Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial systems.

Overview

Use this table to add, modify, or remove columns as needed. The table is divided into five columns: Default, Payroll, Purchasing, Financial, and Notes. Each column has a heading and several rows that can be edited.

Table columns:

- Default
- Payroll
- Purchasing
- Financial
- Notes

Some columns are marked as columns of lesser importance and can be reordered to customize your view.

Tip: Be sure to verify your document's status in Concur before submitting a Travel & Entertainment Expense Report(s) and, as applicable, submit them for approval before the 3:00 pm cutoff.

A new training video has been released! Watch this demo to learn how you can browse through and sign up for our upcoming instructor-led Concur courses. Please note that you can also search "Concur" in the UC Learning Center to find new content, include new exercises, and focus on the most key Oracle details.

This course has recently been updated according to campus feedback to reflect major changes. Each type of expense should be reviewed and included in the proper category.

Oracle: Buying and Paying for PO Requisitioners

Thursday, June 10, 2021 @ 9:00am - 11:00am

Universities across campus have requested a training for those responsible for departmental purchases who want to further their understanding. The primary purpose of the training is to provide attendees with the opportunity to learn how to create, edit, and submit requisitions in Concur.

Requests should be closed to lift the commitments. Concur users/delegates can use the "Close/Inactivate Request" button at the top right of the open requisition. Once all associated Expense Reports have been processed, then your Travel/Event Requests should be closed to lift the commitments. Concur users/delegates can use the "Close/Inactivate Request" button at the top right of the open requisition.

In Oracle Projects, non-salary cost transfer requests (journals) that were not originally in PPM. Any non-PPM, non-salary cost transfer requests (journals) that were not originally in PPM should be moved to the new project in the GL. Expense transactions should be corrected to post to the new project.

If you have requisitions that were rejected or not submitted (i.e. incomplete), and the departmental fund manager would like to end date the task sooner, submit a PO change order for any uninvoiced POs. Costs on the old project for open purchase orders should be moved to the new project with a new project number. Concur expenses that post after June 23 for monthly, cutoff deadline at 5:59 am June 14 for bi-weekly, cutoff deadline at 5:59 am should be moved to the new project in the GL. Expense Report to identify any transactions posted to the old project only in the GL. Resource transactions need to be moved to the new project in the GL. Expense transactions need to be corrected to post to the new project.

If the accounting entries need to be modified for an open purchase order, Concur expenses that post after June 23 for monthly, cutoff deadline at 5:59 am June 14 for bi-weekly, cutoff deadline at 5:59 am should be moved to the new project in the GL. Expense Report to identify any transactions posted to the old project only in the GL. Resource transactions need to be moved to the new project in the GL. Expense transactions need to be corrected to post to the new project.

Payroll that has moved as part of this non-salary cost transfer work with individual partners to initiate resource transfer for their area.

Partner with your VC office to initiate resource transfer for non-salary cost transfer. For example, if the accounting entries need to be modified for an open purchase order, Concur expenses that post after June 23 for monthly, cutoff deadline at 5:59 am June 14 for bi-weekly, cutoff deadline at 5:59 am should be moved to the new project in the GL. Expense Report to identify any transactions posted to the old project only in the GL. Resource transactions need to be moved to the new project in the GL. Expense transactions need to be corrected to post to the new project.

Each Tuesday important updates related to Oracle, Concur, and Budget & Finance, including Oracle PPM (Non-Salary), UCSD-DSH Accounts Receivable Panorama, and University of California - Office of the Chancellor (UCOP) are delivered to your inbox. Our publications team is via email as a checklist to help you navigate through travel pre-approval, financial approval, and work with individual partners to initiate resource transfer.

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