responsibilities, identify their resources based on the following questions:

How to Resolve an Accounts Payable Invoice Hold

Useful Links

Act Upon the Invoice Hold

Click on your Watchlist on the top right corner in Oracle.

Invoice holds are routed to the Requester indicated on the Purchase Order for approval when there is a discrepancy in price or other transactions that are pointing to the legacy Project/Task so that additional expenses don’t continue to post in the future.

Transfers prior to requesting a fund swap for the remaining balance. This may also include updating payroll, recharges and budget allocations and include

The Campus Budget Office can assist with clearing these fund balances (whether positive or negative) via a SOFI swap as the main Core Operating Fund (13991). However, in the Oracle transition, some legacy index balances will operate with SOFI as their main Core Operating Fund (13991). With the implementation of the Simplified Operating Funds Initiative (SOFI) in FY2016, most departments across campus now

Sign up for the Spring Reporting 1:1 Sessions

Stephanie Chernau will discuss the significant improvements to the Concur PPM Commitment Process effective 5/31 and how

Fund Management Office Hours

Find out about the PPM contract and invoice process. These resources and training are for individuals new to UC San Diego

Tips & Tricks

From now until August 2nd, join the Fiscal Close Office Hours to ask questions and provide feedback regarding fiscal close

Endowment Guide

The SAP Concur for Mobile App Blink page is now Live! Learn more about the app and how to keep track of your receipts and

Blink page

The expense report is approved. If the invoice charges accurately reflect goods that were received or services that were performed, Release the invoice

Compare the invoice details shown in the notification with the PO in Oracle

What is changing:

Significant improvements to the Concur commitment process will go into effect on May 31st and we would like to thank those

Improvements to Concur Commitments

Please only submit a Services & Support case if a commitment needs to be corrected urgently.

Requests will remain open until a corresponding expense report is approved.

Please send us feedback on how we can improve the service.

Submit a ticket or suggest enhancements or help escalate issues by emailing finance-help@ucsd.edu with the subject line:

Before submitting a ticket make sure to check our Frequently Asked Questions webpage.

Some examples of ticket requests:

Request to create a new Budget Activity

Request to update an existing Budget Activity

If you are unsure of the correct Budget Activity to use, please submit a Services & Support ticket

For questions on how to identify and manage your commitments going forward. She originally presented these changes on Feb. 9. Come get your questions

Data and Reporting Workshop: Dashboard of the Week Series

Monday, June 5 @ 11:00am

Reporting Workshop: Concur PPM Commitment Process

Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include workshops, discussions and report demos to help address some of your frequently asked questions. There may also be opportunities to

Next, we will be hosting workshops on:

Monday, June 5th

Oracle Fixed Assets Module Office Hours

Oracle Fixed Assets Module Office Hours Monday June 5th

At the end of the session, there will be an open QA/QD (Ask Me Anything) session.

If you have other questions, please book a support appointment online.

We hope to see you there!