Learning all there is to know about budget & finance can feel daunting. Did you know that we have two Knowledge Base Articles (KBAs) that provide guidance on how to resolve alerts in Concur?

The first KBA is the "How to Resolve COA/POETAF Failed Validation Errors in Concur". This KBA breaks down the various CoA and POETAF errors, what they mean, and how you can resolve them. Both of these KBAs are a great resource to review before submitting a case about an alert that you do not know how to resolve in Concur. This will save breaks down the various CoA and POETAF errors, what they mean, and how you can resolve them. Both of these KBAs are a great resource to review before submitting a case about an alert that you do not know how to resolve in Concur. This will save

The second KBA is the "Resolving Alerts in Concur on Your Own!" section. This KBA provides guidance on how to remove yourself as a delegate for Concur alerts. If you are no longer needed as a delegate, you can do it yourself! There are two scenarios when you would want to remove yourself as a delegate: removing a user you are no longer needed to delegate for and removing an outdated user. You can also remove users who are no longer needed to be a delegate for you.

### Removing Users You Are No Longer a Delegate For

1. Go to your Profile Settings.
2. Select the Expense or Request Delegate button.
3. Toggle to the Delegate For tab.
4. From there you will have the ability to select the box next to the name(s) of the users you want to remove as a delegate.

### Removing an Outdated User

1. Go to your Profile Settings.
2. Select the Expense or Request Delegate button.
3. Toggle to the Delegate For tab.
4. From there you will have the ability to select the box next to the name(s) of the users you want to remove as a delegate.

### Removing a User as a Delegate For You

1. Go to your Profile Settings.
2. Select the Expense or Request Delegate button.
3. Toggle to the Delegate For tab.
4. From there you will have the ability to select the box next to the name(s) of the users you want to remove as a delegate.

In this course, you will learn about Concur processes for prepaying travel and claiming expenses after the business trip. The course provides an overview of UC San Diego travel policy and procedure, including summarized guidelines, resources, preparers (Concur Delegates) and approvers. The course is intended for those involved in the process of trip reconciliation for business travel at UC San Diego, including travelers, business officers, or DSA to finalize your sign in information. You will have the ability to log-in. If you need Business Systems access please follow the UC San Diego Help Desk for assistance.

### Enhancements to the Supplier Inquiry Report + Webinar

To provide best practices on using the Supplier Inquiry report, we have also published an Enhancement Release. Visit the Supplier Inquiry report for quick links to various resources available to you.

### New! Budget vs Actual Report has been rebuilt in Cognos

Special thanks to Katy Schoeneweis and Jason Yates for submitting these enhancement requests. The GL Project Balances Report: Project Reporting Category has also been added as a field to the report. The Project Reporting Category is now a multi-select prompt and allows users to view projects that have no reporting and information, visit the Supplier Inquiry report.

### The UC San Diego Budget & Finance Weekly Digest

Each Tuesday, the Weekly Digest provides important updates related to budget, planning, and reporting. In this issue, we have included information about the Planning and Budgeting Dashboard, the Fiscal Close Office Hours on Friday, July 21, 2023, and the Financial Operations Office Hours on Friday, July 21, 2023. Don't miss it!

### Reporting 1:1 Sessions

The course will include an in-depth explanation of Concur processes related to meetings, entertainment, and business expenses. Preparers (Concur Delegates) and approvers for requesting employee reimbursements for business expenses may attend this course. It is intended for preparers, approvers, and attendees. Join us virtually each week as we dedicate time to training on a specific dashboard or report. The workshop format will include discussions and report demos to help address some of your frequently asked questions. There may also be opportunities to ask questions and interact with the BI & Financial Reporting team. Don't forget to sign up for a 1:1 Zoom session to meet with a member of the BI & Financial Reporting team who can answer your specific questions.

### Reporting Workshop: Dashboard of the Week Series

Each Tuesday, the Weekly Digest provides important updates related to budget, planning, and reporting. In this issue, we have included information about the Planning and Budgeting Dashboard, the Fiscal Close Office Hours on Friday, July 21, 2023, and the Financial Operations Office Hours on Friday, July 21, 2023. Don't miss it!

### Hot Topics to learn about the reports that exist for Concur and how best to use them.

### Clinic - General Contract Billing, Open Q&A

Join the Financial Operations team this Friday for updates on Fiscal Close for subledgers, Fixed Asset module, Deep Dive for quick links to various resources available to you. Open Q&A.

### Oracle Fixed Assets Module Office Hours Monday July 24th

If you have any questions or need further assistance, contact the Financial Operations team at financehelp@ucsd.edu or 858-822-4300.