Finance NEWS

PennState
College of Health and Human Development

Finance Website

Please refer to our **Resources Webpage** for Financial Information and SIMBA Helpful Hints. Some recent updates/instructions added:

- Retrieval of OPP Billing Reports
- Budget vs Actual by Funds Center
- How to Approve:
  - ∗ Non-PO Invoice
  - ∗ Journal Entry
  - ∗ Shopping Cart

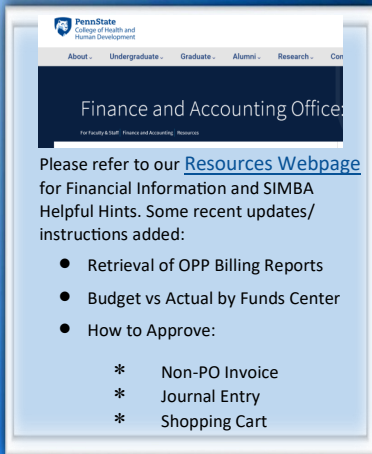### SIMBA/SAP Concur Classes:

Travel Expense

Session 26573, Wednesday 7/26/23
10:00 AM

Session 26574, Wednesday 8/16/23
10:00 AM

Goods & Services

Session 26571, Thursday 7/20/23
1:00 PM

Session 26572, Wednesday 8/24/23
1:00 PM

Request Pcard Maintenance

BOBJ Open Office Hours

Upcoming Sessions:

BOBJ every second (2nd) Tuesday 9:00-10:00 am

Open Reporting Hours every fourth (4th) Thursday 9:00-10:00 am

All sessions will be hosted via **Zoom**

If you have someone who is new to SIMBA BOBJ or Webi reports (or if you need a refresher) it will be incredibly helpful to watch the **Webi 101 Session**.

EVENT EXPENSES ON GRANTS

All event expenses being charged to a grant/sponsored program must have Research Review/Approval attached. Please obtain and attach this approval prior to submitting SAP reports and SIMBA documents.

SOFTWARE ON PERSONAL COMPUTERS

All software purchases require ISS approval prior to purchase. Software purchased for, or downloaded to, a personal computer is not reimbursable, unless charged to gift funds (OGE).

PERSONAL FUNDS SHOULD NOT BE USED

A reminder that business purchases should not be made using personal funds. The only exceptions are; memberships, conference registration, group meals or to pay for travel expenses. These purchases can be made with personal funds and reimbursed to the employee. If a purchase, other than the types listed above, is made with personal funds, a one time exception for reimbursement must be approved by Nicky Rigg and her approval uploaded for payment. Don't risk not being reimbursed for the expense.

ISR (INTERNAL SERVICE REQUEST)

The SIMBA Team has been reviewing the usage of the Internal Service Request (ISR) document in SIMBA. The document is a custom-created feature for Penn State and there is long-term concern regarding the viability of the feature as it does not always react well to system updates and upgrades.

The feature has limited usage with two (2) areas comprising 90% of the use cases. After discussion with these units, it was determined that the Journal Entry (JE) will meet the current use cases of the ISR and that the custom form can be decommissioned. The JE is a heavily used form within SIMBA and is familiar to the broad user base. More information regarding the JE can be found on the SIMBA website at: **Resources – Journal Entry**.

The ISR will be officially decommissioned at the end of the 2023 fiscal year and will no longer be available beginning July 1, 2023. If you have any questions or concerns, please submit a **ticket to the SIMBA ISR Team**.

SAP CONUR NEW USER INTERFACE

The following SAP Concur training sessions are available in the Learning Resources Network:

Travel Expense —**Click here to register for Travel New user interface sessions in LRN**

Goods & Services —**Click here to register for Goods & Services New user interface sessions in LRN**

Pcard Requests—**Click here to register for Pcard request New user interface training session in LRN**