PennState
College of Health and Human Development
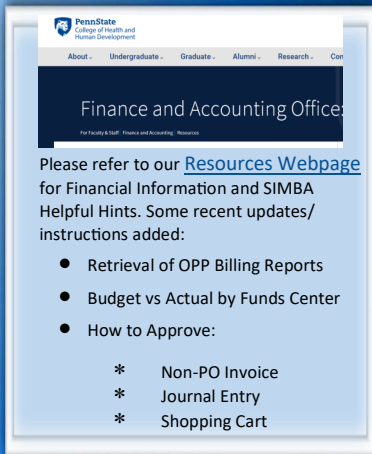
SIMBA/SAP Concur Classes:

Goods & Services

#24276, Wednesday, 3/23/2022, 10:00 AM to 12:00 PM

Travel Expense

#24274, Wednesday, 3/16/2022, 10:00 AM to 12:00 PM

PCard Policy & Procedure Training

Wednesday, March 9, 9:00-10:30
Thursday, April 7, 9:00-10:30
Tuesday, May 3, 1:30-3:00

Click Here to register through LRN
Or

Corporate Controller's Website

BOBJ Open Office Hours

Upcoming Sessions:

BOBJ every second Tuesday 9:00-10:00 am starting 1/11/22

Open Reporting Hours every fourth Thursday 9:00-10:00 am starting 1/27/22

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.

PROCESSING JE'S

When processing JEs to transfer expenses from one account to another, transfer each line item separately. Do not combine line items with the same GL into a lump sum. Only transfer the actuals. If there is a PO that has not been actualized but needs to be transferred, you will need to process a PO change form.

JEs to correct an error must include how the error will be avoided in the future in the justification entered in the long text box of the form. Also remember to answer the questions who, what, where, when and why in the justification.

GROUP MEALS

Group meal forms are no longer needed in SIMBA or SAP Concur. If entering an Event Expense in SAP Concur for a group of 12 or more attendees and the attendees are not entered individually in the event expense, you must upload an event expense attendee list to the report. The attendee list must contain Attendee Name, Attendee Title, Institution/Company and Attendee Type. There is an event expense attendee form located on our Finance Office resources page.

NOTE: When reconciling in SAP, report type should be Travel, not Goods & Services.

OGE/MGR/ENDOWMENT REPORTING

To view reports for OGE and MGR accounts:

- Always start with FY 2020 and run through the current FY. These are life to date accounts that began in 2020 and all years need to be viewed to get an accurate account balance.

To view reports for Endowment Accounts:

- Always start with FY 2021 and run through the current FY. These are life to date accounts that began in 2021 and all years need to be viewed to get an accurate account balance.

CONTRACTS ROUTING PROCESS UPDATES

Beginning on March 1st the following new processes will be in place:

Procurement has updated the contract submission form so that a single form can be used on contracts paid via purchase order, non-PO invoice contracts, P-Card contracts, electronic click-through type agreements (except for software), as well as non-financial contracts. This form and instructions can be found on the contracts information website.

Additionally, the riskcontracts@psu.edu email address for submitting contracts is being retired. All contracts that use the new submission form should now be sent to psucontracts@psu.edu.