TEM Web ADI FAQ’s

How do I get access to TEM Web ADI?

To gain access to the TEM Web ADI Maintenance forms, you need to complete the online training course “BEN Web ADI Training for TEM Maintenance” through Knowledge Link, then complete a Ben Financials Access Request eForm. Under the section “Requested Access- BEN Pays” select Web ADI TEM Maintenance.

The Web ADI forms will not download on my computer.

Your Excel and internet browser settings may need to be adjusted for Web ADI compatibility. Please refer to the Required Settings Guide.

Which form do I use to…?

Student Maintenance:
- Assign/edit a default reviewer and default funding source for students

Active Payroll Appt. Maintenance:
- Assign/edit a default reviewer and default funding source for faculty & staff
- Assign a user as a Supplemental Approver entering a ‘Y’ in the Supplemental Approver field

Add Funding Source:
- Add a new account combination to the Funding Source Maintenance form

Funding Source Maintenance:
- Assign a Level 1, Level 2, or Level 3 approver to a funding source to add it to Concur
- Exclude a funding source from Concur by setting the Exclusion flag column to ‘Y’

Add Delegate:
- Add a delegate to Concur
  Note: An approval delegate cannot be added through the Web ADI Add Delegate form. To assign an approval delegate, log in to Concur and navigate to Profile>Profile Settings>Expense Delegates. For detailed instructions, see the instructional guide Assign an Approval Delegate.

Delegate Maintenance:
- Disable a delegate relationship
- Edit the ‘Receives Emails’ option for an existing delegate
  Note: The list of delegates shown on the Delegate Maintenance form is restricted to only those who were added through Web ADI. If a delegate was set up within Concur, the delegate will not show up on the Delegate Maintenance form.

Run Add Delegate for Entire Org:
- Add a delegate relationship for everyone in a Home/Student Sponsor Org.
- Cannot set ‘Receives Emails’ to Y - turn that functionality on in the Delegate Maintenance form.

View Add Delegate Request:
• Displays your ‘Add Delegate for Entire Org’ requests and their status. You can view the output and details here also. View only.

How do I upload the changes that I’ve made on the Web ADI Maintenance forms?

Once you have finished making updates on the form, upload the changes by selecting the Add-Ins tab at the top of the worksheet, then click Oracle>Upload. Click Upload again on the pop-up window. The pop-up window will then confirm whether the upload was successful or not. If the upload was successful, you will see a green smiley face next to the rows that were uploaded. If the upload was not successful, you will see a red sad face and an error message in the ‘Message’ column.

How do I add someone as an expense user through Web ADI?

Faculty, staff, and students need to have a default funding source, default reviewer, and active payment method in order to gain access to the expense tab in Concur. For students, the “Expense User” column on the Student Maintenance form also needs to be changed to ‘Y’.

Why can’t I find the approver I am trying to assign?

When you search for a default reviewer or cost object approver in Web ADI, the list of values is restricted to active Faculty & Staff Members who are expense users and are not in error status. You can add a UPHS or Agency employee who is not an active faculty or staff member at the University to Concur by completing a Concur Expense Access Request form. UPHS/Agency users are granted access as approvers and/or delegates only- they will not be able to submit their own expenses through Concur.

What does it mean when someone is in error status?

A user is in error status if their default funding source is invalid. (A valid funding source has at least one approver assigned to it, and the Exclusion Flag is either ‘N’ or blank on the Funding Source Maintenance form.) If a user is in error status, no changes to their record will be sent to Concur until they have a valid default funding source. There is a ‘Status’ column on the Active Payroll Appt. & Student Maintenance forms which indicates if a user is in error status.

How do I filter the results after I download a form?

You can download an entire form by entering the wildcard symbol % for all of the search parameters, or you can search for a specific org, school/center, etc. Once the download completes, turn on the filters by clicking on the Add-Ins tab, then select Oracle>Filters>Show Filters. Filter on any of the columns to select the records you need to update.

Can I update multiple users at once?

Yes- after you edit one field, you can copy it by clicking on the bottom right corner of the cell, the dragging it down the list. Upload all of the changes at once by clicking on Add-Ins>Oracle>Upload.
When I search by School/Center, the form downloads zero records.

When you search by School/Center, only enter the two-digit school/center number, not the three-digit CNAC value. For example, for Division of Finance, search for school/center 87, rather than 870.

How do I add a new fund to Concur?

A new fund needs to be budgeted or charged with an expense object code 52XX before it is available in Web ADI. As a workaround, you can create a dummy journal entry to charge an expense against the fund:

Create a new journal for $1 and charge the account you would like to add, using object code 5200. Save the journal but do NOT reserve the funds. Delete the journal immediately after saving it. The act of saving it will create the COA combination, and the following day it will be available in Web ADI on the Funding Source Maintenance form (assuming you are using the resp org). If you are not using the resp org, then you will be able to add the funding source on the Add Funding Source form the day after creating the dummy journal entry. Once the funding source is available on the Funding Source Maintenance form, you need to upload an approver, then it will feed into Concur overnight.

When I try to add a funding source on the Add Funding Source form, I get an error that says the combination already exists.

Either the funding source is already available on the Funding Source Maintenance form or the funding source is inactive. If the funding source is listed on the Funding Source Maintenance form, it needs to have at least one approver assigned to it, and the Exclusion Flag column must be blank or ‘N’ in order for the account to be active in Concur.

If the funding source is NOT listed on the Funding Source Maintenance form, then the account combination is inactive, most likely because the fund is frozen. A fund needs to be unfrozen for PDA forms and feeders to be active in Web ADI and Concur.

When I try to add a funding source on the Add Funding Source form, I get an error that says 'Enter a valid FUND'.

The fund number must be selected from the List of Values with the description appended to it. Double click in the Fund cell to search the List of Values.