The Learning all there is to know about budget & finance can feel daunting. The Support Framework: Your Guide to Finding Help.

How to Change the Requester on a Purchase Order

More information about the series and a full schedule can be found on the Blink page and join the Office Hours Zoom link for quick links to various resources available to you. Our goal is to deliver timely information that matters to you.

UPCOMING EVENTS

New Report Release: Project Management Dashboard

The new Project Management Dashboard is now available. This dashboard offers one place to conduct a complete analysis of a portfolio of projects, including GL and PPM balances, variance analysis, commitments, payroll reconciliation, and expenditures over time. The Project Management Dashboard is accessible from the PPM home page.

Related Enhancements

- In particular, GL-PPM variances in accounts 774010-To/From Reserves and 774011-Capital Outlay will be reflected in the new dashboard.
- A new tab called 'Account Codes in PPM' provides a full list of accounts and defines whether they are intended to be used for GL or PPM.
- The Resources tab, which can be used to help escalate adjustments and extend the processing time to approve non-event out-of-pocket expense reimbursement requests.

Online Office Hours

At this week's office hours, we will walk through how to use the newly released Project Management Dashboard for your monthly fund management activities, review changes to the GL-PPM Reconciliation report that will help you determine what amount to enter in PPM budgets for updated PPM balance reporting, and review changes made to the Expanded Project Summary.

Tips & Tricks

The “Generate Revenue” job does not successfully generate revenue for a specific contract or project. Non-Sponsored Generate Revenue Process Errors:

- Use this report to identify errors that occur when a “Generate Revenue” process is run for a specific project or contract. This report provides information on why the job failed and what actions you can take to resolve the issue.
- The expanded project summary report now includes the opportunity to reference an external customer PO# per customer invoice, instead of at the contract level.
- This includes the ability to reference an external customer PO# per customer invoice, instead of at the contract level.

Announcements

The Revenue job will fail if the Project Panorama is not accessible. Be sure to try out the different calendar views in the upper right corner!