Oracle PPM Cost Transfer Feature Launches December 21

A cost (expense) transfer occurs when expenses are moved from one accounting distribution to another after they have been recorded in Oracle Financials (OFC). The new Oracle PPM cost transfer functionality will allow users to initiate transfers for transactions from Project to Project, Single Project from one Task to another Task, Single Project from one funding source to another, and Non-Projects to Projects and vice versa.

The following resources are available for you to learn the new cost transfer process:

- Watch the University Cost Transfer training webinar for a general overview of the various types of cost transfers, uses, and system navigation. Topics include how to initiate & approve cost transfers, view cost transfers in OFC, and more!
- Refer to Knowledge Base Article (KB0032893): How to Perform a Full or Split Cost Transfer Transaction in Oracle
- Attend office hours for cost transfer support

In preparation for this new feature, members of OPAFS teamed up to process outstanding cost transfers submitted through Services & Support. As of the past two weeks, over 250 requests have been processed. Associated IDC corrections for IFIS cost transfers are in progress.

Track Known Transitional Issues

Many one time transitional issues impacting financial processes and reports were identified and corrected centrally through the month of November. We have curated issues and will maintain a central page to support financial review and corrective actions by department fund managers.
Update on Financial Information System Go-Live
While we continue to make steady progress transitioning to new processes and systems over the first six months since Go-Live, we know we are far from the level of fluency achieved with our previous systems that have been familiar to us over many decades.

Expect more information from us in the new year.

View the full campus notice.

Training & Engagement Resources

University Cost Transfer Training
The University Cost Transfer training provides a general overview of the various types of cost transfers, uses, and system navigation. Topics include how to initiate & approve cost transfers, view cost transfers in OFC, and more!

New Year, New Trainings
Additional training focused on common activities (reconciliation, financial reporting, corrective actions, etc.) performed by department fund managers begins in January. New modules and webinars will be developed and made available through multiple mediums, in an effort to support as many learning styles as possible. Please expect more information from us in the new year.

Bookmark the Training & Events Calendar to track upcoming training, events, and see which trainings are right for you. Recorded webinars are available to watch on-demand at your convenience.

BI & Financial Reporting Updates

Oracle Report Roadmap
View the new detailed roadmap of all Oracle reports in the queue. To request additional reports or report enhancements to be added to the roadmap, you can now request new reports here.

Consistent with all new system launches, all standard financial reports will be published on https://reports.ucsd.edu, with links to request access and support.
Project Information Lookup
This report provides information for COA and POETAF values for projects and is searchable by Business Unit, FinUnit, and Project Manager. The report is designed to bring back all projects, including those that have not been funded, have not had accounting posted against them, and even those without an award, contract or task number.

Project Information Lookup can be accessed directly in Oracle or at reports.ucsd.edu under Budget & Finance. For details see Knowledge Base Article (KB00330304): How to Access and Run UCSD-DSH Project Information Lookup

Help make this lookup tool great! If you have a project that is not showing in the report, please submit a ticket with the following information:

- Project Number
- Is the project new?
- Has the project been funded?
- Is there a task number associated?
- Are there any costs entered against the project?

Implementing New Operating Standards
As of 12/14, we are working on implementing new operating standards in an ongoing effort to protect your production reports. Please be advised that bookmarks, favorites and saved links may no longer work. All report access will be made available via reports.ucsd.edu and new links will be provided.

Unable to see Reports in the Oracle Financial Reporting Center (FRC)
Over the next few weeks you will see some changes to the overall end user strategy for Oracle BI Reporting at UCSD. In the meantime, if you are using FRC as a primary way to view reports, the below helpful tip is for you:

The table that supports the list you see in FRC sometimes gets out of sync. To fix it:

1. Go to Navigator-> Financial Reporting Center
2. Click on Task Panel
3. Click on Open Workspace for Financial Reporting Center
4. Click on Navigate-> Applications-> BI Catalog
5. Navigate to where the report should be

See the reports? Great! Just head on back to FRC and search away! The reports will be visible.

If you still don’t see the reports, it could be a caching issue:

- FireFox browser
  Task Panel > Options > Privacy & Security > Cookies and Site Data > Clear Data

- Chrome browser
  Task Panel > Settings > Clear browsing data

If the problem still persists, you could have a security issue. Please submit a ticket in Services & Support!

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**Services & Support**

**New Notification Banner**

A new notification banner has been added to the Services & Support portal to notify you of financial system outages and significant processing delays should they arise.

**Check out the latest new or enhanced Knowledge Articles**

Visit Find Answers in the Budget & Finance portal and search by KB#
System Alerts

Users may experience temporary outages or performance issues during maintenance windows. When a planned outage is known, rendering the service unavailable for an expected 60 minutes or more, campus will be notified.

Oracle Financials Cloud Production & Oracle Quarterly Release

- OFC quarterly updates - Every 3rd month (Mar, June, Sept, Dec). 3rd Friday of the month. Start time 7 PM PST. End time 7 AM Saturday.

- The Oracle Financials Cloud production site has a variable quarterly maintenance and update window. The next release, Oracle Release 20D, is scheduled for December 18.

Visit the system maintenance page for a complete maintenance schedule.

Thank you!

We want to thank faculty & staff for their hard work and dedication during this time of unprecedented change. We are particularly grateful for the close
Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial information system and support departments’ success in managing their fiscal responsibilities. Find answers, request services, or get help from our team at the UC San Diego Services & Support portal.

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