Oracle PPM Cost Transfer Feature Launches December 21

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! The University Cost Transfer training webinar will be posted to Oracle BI Reporting at UCSD. In the meantime, if you are using Oracle reports as a primary way to view reports, the below helpful tip is for you:

If you still don’t see the reports, it could be a caching issue: 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. Navigate to where the report should be
3. Click on Navigate-> Applications-> BI Catalog
4. Click on Task Panel
5. Go to Navigator-> Financial Reporting Center
6. Click on Task Panel > Options > Privacy & Security > Cookies and Site Data > Clear Data
7. Navigate to where the report should be

Oracle reports are designed to bring back all projects, including those that have not been funded, so make sure you are seeing results for any projects you may have. This is especially important when fielding reports to campus partners and in the upper executive office hours.

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 systems over the first six months since Go-Live, we know we are far from the end of this journey! We are making steady progress transitioning to new processes and systems. One of the ongoing efforts is to protect your production reports. Please be advised that implementing new operating standards has created some challenges for Oracle reports.

Oracle reports are currently being protected in a "sandbox" environment. The report, please:

1. Visit /orafin/lookup
2. Click on Office Hours
3. Search "Non-Projects to Projects" or "Projects to Non-Projects"
4. Select the project information look-up
5. Enter task, award, contract or task number.
6. Copy the report, please

Financial Information System Go-Live

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

- Single Project from one Task to another Task, Single Project from one funding source to another, and Non-Projects to Projects and vice versa.
- A cost (expense) transfer occurs when expenses are moved from one cost center to another after they have been recorded in Oracle PPM. A cost transfer can be initiated within Oracle PPM Cost Transfer for financial stewardship. A cost (expense) transfer may be initiated through the Source to Target process to move a cost from one cost center to another. A cost transfer may be initiated through the Target to Source process to move a cost from one cost center to another.

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