

July 6, 2021

Subject: Faculty and Researcher Panorama (Third Release)

Dear faculty, researchers, and fund managers,

We are thrilled to announce the third enhancement release of the Faculty and Researcher Panorama. This long-anticipated release adds information on non-sponsored projects with data from both the General Ledger (GL) and the Project Portfolio Management system (PPM). Based on feedback from frontline fiscal and fund managers, the following enhancements are now live:

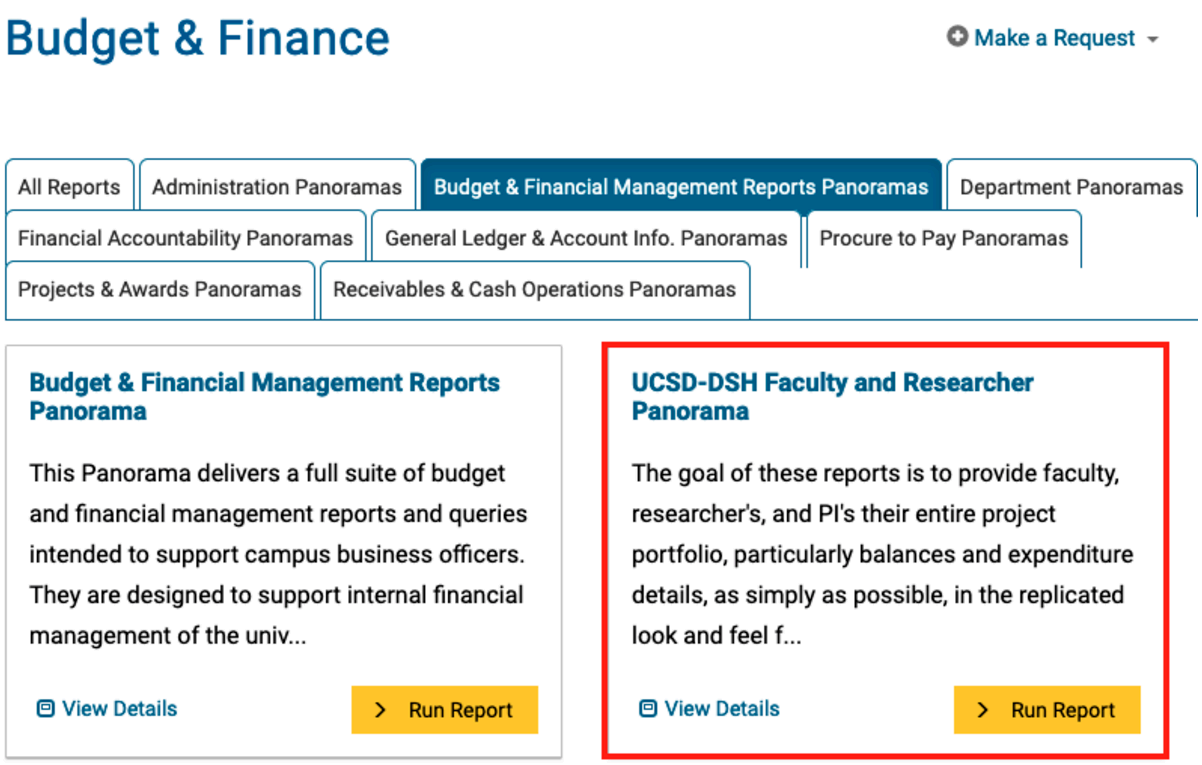
1. **A General Ledger table provides current fiscal year activity and available balances for your non-sponsored projects.** A link on the project name takes you to a GL Expanded Project Summary page that provides additional detail on resource and spending totals as well as transaction-level detail.
2. **Similar to the Sponsored Projects section of the report, two PPM-based tables provide summary information on projects and tasks to which you are assigned as project manager or task manager.** These tables display budgets, revenue from customer/sponsor billing, total costs, commitments, and an available balance for each project and task. Links on the project and task names take you to additional PPM-based detail for your revenue, costs, and commitments.
3. **A third section of the report lists your sponsored and non-sponsored projects and tasks with no activity to date.**

To help you understand the information you see in the Non-Sponsored Projects section of the report and important differences between the GL and PPM tables, we have prepared a highly interactive, self-paced training. Please review the training prior to reviewing your data in the report, as it will address

many questions you are likely to have when viewing the report. The training covers the entire report, including the Sponsored Projects section. If you are already familiar with the Sponsored Projects section of the report, you may skip to the training section titled, "Non-Sponsored Projects: GL vs PPM Management Is Critical."

If you would like to see this report with your sponsored project information:

1. Navigate to the Business Analytics Hub at bah.ucsd.edu
2. Select **Budget & Finance**
3. Select the **Budget & Financial Management Reports Panoramas** tab and locate the **UCSD-DSH Faculty and Researcher Panorama**
4. Click the yellow **Run Report** button in the UCSD-DSH Faculty and Researcher Panorama
5. Click the blue **Company Single Sign-On** to view



For more information on how to run the report and to understand your data visit the Faculty and Researcher Panorama Blink page.

As a reminder, faculty and principal investigators have been automatically provisioned access to the Faculty and Researcher Panorama and the report should automatically load with their name associated. If you have any trouble

accessing the report or for inquiries, email hsears@ucsd.edu.

Office Hours Support

We are here to support you! In an effort to provide ongoing and dedicated support to the faculty and researcher community, we will be starting a Faculty/Researcher Office Hours scheduled for Tuesday, July 13 from 1:00-2:00 pm. Click here to join - https://ucsd.zoom.us/j/94383220998

This hour will be dedicated to supporting you as you work within Oracle to view, interpret and understand your project financials. Co-hosted by Beverly Baker and Heather Sears, this is your opportunity to continue your learning on the new reports as well as ask any other questions you have of the new Oracle financial system.

Future Releases

Planned enhancements for future releases:

- Add historical payroll information so you can view who was paid from your projects and tasks
- Possible addition of payroll projections to provide balances net of future payroll

Thank you for your support!

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.
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