### Budget & Finance Digest

**University of California San Diego, 9500 Gilman Drive, La Jolla, CA, 92093**

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**Announcements**

- **New Feature:** Quick Payroll Card Transfer Launching December 14

A cost transaction change occurs when expense is moved from one account to another. This feature will make it easier to perform this change.

- **Oracle Plan and Budgeting**

The following resources are available for you to learn more about our planning and budgeting features.

  - **Oracle Planning and Budgeting Standard**
  - **Oracle Planning and Budgeting Subentry**
  - **Oracle Planning and Budgeting Cloud**

- **UCPath System Outage**

Starting Wednesday, December 9 at 10 am the UCPath system will be unavailable until 5 pm. This outage is expected to take place for about 6 hours and 40 minutes. This will be an integral step in our move to the Oracle Cloud. More details are available on the Finance Systems Status page, where we provide a list of upcoming outages.

- **UCPath Support**

Please contact our UCPath support team at 858-656-1400 for assistance.

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**BI & Financial Reporting Updates**

- **DOPE Report Webinar**

Wednesday, December 16 @ 11:30am - 12:30pm

Attend this session to learn more about UCPath Vacation Accounting & the DOPE Report, followed by Q&A. Presenter: Pearl Trinidad.

- **Payment Compass Webinar**

IPPS will host a second virtual in-person webinar on Payment Compass functionality, the invitation is on the Finance Systems Status page. Attend this session to learn more about Payment Compass Webinar in UC Learning.

- **Oracle Planning and Budgeting Cloud**

Oracle has announced the release of Oracle Planning and Budgeting Cloud for January 2021 (19.1). This release will increase flexibility for users by providing a more lightweight option for those who are looking for a fully cloud-based solution.

- **Oracle Planning and Budgeting Standard**

This release includes new features, such as the ability to view project balances with expenditure details dashboard, which will provide insights for all project types. Special thanks to Eva Thiveos and Irvin Palacios for their development efforts on these reports.

- **Enhanced Oracle and Concur Role Removal Request**

If you are not familiar with the roles for department users, then please contact the Office of Accounting and Financial Analysis (OFA) to understand the roles and access answered. Attend a training class on Tuesdays at 9:30am to have your questions about roles answered.

- **Campus User Roles Report**

Oracle issued a release for UCPath that will impact roles and access needs. If you need to remove a role at any time, please contact the Office of Accounting and Financial Analysis (OFA) for assistance.

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**Training & Engagement Resources**

- **Oracle Planning and Budgeting Standard**

UC Path will host a session to introduce users to the new Oracle Planning and Budgeting Standard features. The session will be held in January 2021. To prepare for the training, visit the Virtual instructor led system training for Campus budget preparers will be held on Monday, December 14, 2020 @ 1:30pm - 3:00pm.

- **Oracle Planning and Budgeting Cloud**

Not sure if you’re responsible for preparing the budget for your Financial Unit in the upcoming fiscal year? Join us for our introductory session on Oracle Planning and Budgeting system. If you are interested in learning more about this, please attend the training on Tuesday, December 22, 2020 @ 10:00am - 11:00am.

- **Oracle Planning and Budgeting Standard**

We are excited to announce that the Budget & Finance Reports Now Available @ reports.ucsd.edu.

- **Oracle Planning and Budgeting Cloud**

Upcoming Release: Oracle Planning and Budgeting Cloud. The new release will include new features, such as the ability to view project balances with expenditure details dashboard, which will provide insights for all project types.

- **Oracle Planning and Budgeting Standard**

The General Ledger Detail report has been enhanced to include new drill down functionality so users can trace from General Ledger summary level detail back to detailed transaction line item information and original source documentation. This enhancement will provide users with a more detailed view of financial transactions.

- **Oracle Planning and Budgeting Cloud**

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**Oracle Planning and Budgeting Cloud**

The UCPath system will be unavailable from Monday, December 7 at 9 am until Tuesday, December 8 at 1 pm for system testing.

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