Announcements

New Project - Quick Pay Card Transfer Launching December 14

A card-based payment solution which streamlines and automates an efficiency enhancement to Quick Pay Card Transfer, thus improving turnaround time for processors. This change is available to all Quick Pay Card Transfer users.

【Submit a ticket】

The following resources are available if you have issues with the new functionality:

- Quick Pay Card Transfer Training resources
- Budget & Finance Support Knowledge Base Article (KB0033119)

Check office hours if you need a submittal completed outside of your regular business hours.

【Share this email】

Share the message with a colleague or anyone at UCSD who might be interested in learning about this new functionality.

 UW San Diego, 9500 Gilman Drive, La Jolla, CA, 92093

Budget & Finance Digest

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

Click here to subscribe to our mailing list.

Find answers, request services, or get help from our team at the UC San Diego information system and support departments' success in managing their fiscal responsibilities.

Virtual instructor led system training for Campus Research improves your ability to track and report sponsored project expenditures. To opt-in to receiving updates, please sign up to the training distribution list to receive notifications.

UCPath System Outage

Starting November 6 at 9:30 pm to 10:30 am Monday, December 14 at 6 pm to 7 am to all UC employees during the Amazon Web Services (AWS) cutover. During this time, UCPath System Outage will be unavailable for processing. During this time, UCPath System Outages may continue to display old data and, in some cases, incorrect data.

Enhanced General Ledger Detail Report

The General Ledger Detail report has been enhanced to include new drill down balances with expenditure details. This dashboard will be especially helpful for department users. For report details see Knowledge Base Article (KB0034149): How to run and view Project Balances with Expenditure Details Dashboard.

We are excited to announce that the Budget & Finance space within reports.ucsd.edu is now available to all UC employees. During the transition period please see our Budget & Finance Reports Now Available link to access the space.

BI & Financial Reporting Updates

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

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

Special Finance & Reporting Webinar

Wednesday, December 16, 2020 @ 9:00am - 10:30am

Register for an upcoming University Cost Transfer Training. Not sure if you're responsible for preparing the budget for your Financial Unit in the upcoming release of Oracle Planning and Budgeting in January 2021? UCSD will have new roles and responsibilities for budget preparers in your Financial Unit, and you'll need to know how to plan for the transition to this new environment.

Oracle roles needed to initiate or approve cost transfers to another department

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New Feature: Oracle PPM Cost Transfers Launching December 14

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Check our office hours if you need assistance completing an expenditure transfer.

Please note that you will not have access to the UCPath system during the UCPath System Outage.

How to determine the Oracle & Concur Roles

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Oracle and Concur Access De-Provisioning

Please be aware that user roles and access need to be reviewed by department managers and administrators across the University community periodically. To support the review and de-provisioning process, we have developed some resources available to you:

- Oracle and Concur Role Removal Request

How to run and view Project Balances with Expenditure Details Dashboard

The New Project Balances with Expenditure Details Dashboard provides: "How to run and view Project Balances with Expenditure Details Dashboard.

Project Balances with Expenditure Details Eastbound

This new report balances with expenditure details东端是基于Southwest的，has removed some redundant, obsolete, and interesting highlights from the current version.

New Project Balances with Expenditure Details Dashboard

The New Project Balances with Expenditure Details Dashboard is currently undergoing testing and has removed some redundant, obsolete, and interesting highlights from the current version. This report maintains balance and expenditure details. For report details see Knowledge Base Article (KB0035151): How to run and view Project Balances with Expenditure Details Dashboard.

Enhanced General Ledger Detail Report

The General Ledger Detail report has been enhanced to include one row for each task. Additional detail has been added to the General Ledger Detail report to include detailed transaction information. This new report provides additional detail and information that will help you with your financial reporting tasks.

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New Feature: Oracle PPM Cost Transfers Launching December 14

On November 14, 2020, the Oracle Planning and Budgeting system will be updated with a new cost transfer feature. This new feature will allow users to initiate transfers for transactions from Project to Project, account to account, and other expenditures. This new feature will improve the management of financial resources at the University.

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