Budget & Finance Digest

December 9, 2020

Announcements

New Process: Quick PPM Cost Transfers Launching December 14

A cost (expense) transfer occurs when expenses are moved from one account (object) to another account (object). The new Quick PPM Cost Transfer process will allow users to make transfers to and from single objects. The new Quick PPM process is designed for single Projects and does not allow transfers between Projects.

The following items are available for you to learn more about the detailed transfer process:
- [Quick PPM Cost Transfer Frequently Asked Questions](#)
- [Quick PPM Cost Transfer Training Classes](#)
- [Quick PPM Cost Transfer Support Document](#)

Check Out Our New "How to" Training Series

Existing UCPath users can follow this link to learn more about UCPath processes and features! A list of some of the topics you can find on our site is provided below. By using our "How to" tutorials, you will be able to perform various tasks in the system, whether it be a one-time action or a recurring process.

- [Submit a Campus User Roles Report](#)
- [Oracle roles needed to initiate or approve cost transfers](#)
- [Watch the Cost Transfer Role Mapping Webinar](#)

IPPS will host a second virtual in-person webinar on Payment Compass on Wednesday, January 27, 2021, from 10:30 am to 12:30 pm in the Board of Regents Room, UCSD Jacobs School of Engineering. This webinar will provide an overview of the key features of Payment Compass and how to use it to facilitate your financial transactions.

For any suggestions on enhancements please submit a ticket. For report details see Knowledge Base Article (KB0032937):

Enhanced General Ledger Detail Report

The General Ledger Detail Report is enhanced to include one or more fund descriptions associated with the transaction. The report includes a breakdown of the transaction by object and sub-object, along with detailed information on the transaction. The report is designed to be user-friendly and easy to navigate.

The following resources are available to you to learn more about the new General Ledger Detail Report:
- [General Ledger Detail Report](#)
- [Enhanced General Ledger Detail Report](#)

Partner Messages

UCPath System Outage

Starting Wednesday, December 9 at 10 am to Thursday, December 10 at 11 am, the UCPath system will be unavailable as we update our core financial system. During this time, you will not have access to the system to perform financial tasks, but you will have access to a limited set of tasks. We encourage you to use this time to prepare for the outage.

Please have access to your budget, cost centers, and accounts, and have a plan in place for how you will handle the loss of access to the system.

For any suggestions on enhancements please submit a ticket. For report details see Knowledge Base Article (KB0032936):

BI & Financial Reporting Updates

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

DOPE Report, followed by Q&A. Presenter: Pearl Trinidad.

Special Finance & Reporting Webinar

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

Payment Compass Webinar

Register for Monday, December 14, 2020 @ 1:30pm - 3:00pm

UCPath system available during the Amazon Web Services (AWS) cutover. During this outage, UCPath will be unavailable to all UC employees during the Amazon Web Services (AWS) cutover. During this time, you will not have access to the system to perform financial tasks, but you will have access to a limited set of tasks. We encourage you to use this time to prepare for the outage.

Please have access to your budget, cost centers, and accounts, and have a plan in place for how you will handle the loss of access to the system.

For any suggestions on enhancements please submit a ticket. For report details see Knowledge Base Article (KB0032936):