December 9, 2020

Budget & Finance Digest

Amendments

New PDM - Quick Paysert Transfer Launching December 14

A cost (expense) transfer occurs when expenses are moved from one account or source to another. The transfer is used most often to move costs from an overhead account (e.g. PDM) to a fund account. The Quick Paysert transfer will allow users to easily transfer costs from one source or account to another. To use the transfer feature: Log into the Single Project page, and select Transfer on the Action Bar. For more information on use, please refer to our Knowledge Base Article (KB0032936).

UCPath System Outage

Partner Messages

New Project Balance with Expenditure Details Dashboard

This dashboard will be especially helpful for department users. For report details see Knowledge Base Article (KB0032936): How to run and view Project Balances with Expenditure Details Dashboard! Special thanks to Eva Thiveos and Irvin for their development work.

UCPath System Outage

UCPath system will be unavailable from Wednesday, December 9 at 10 am to Monday, December 14 at 6 pm. During this outage, you will not have access to the UCPath system.

Oracle and Concur Access De-Provisioning

Training & Engagement Resources

Financial Information System: Project Balances vs. Expenditure Details

The dashboard insights for all project types include: costs, and revenues done at the sub-ledger level. Summary and transaction details for project expenditures, committed costs, revenues, and expenses done at all budget levels. Dashboard insights for all project types.

Check Out the New 'Known Issues' Tracking Site

The following resources are available for you to learn the new cost transfer source to another, and Non-Projects to Projects and vice versa. New Feature: Oracle PPM Cost Transfers Launching December 14

Please log into the Single Project page, and select Transfer on the Action Bar. For more information on use, please refer to our Knowledge Base Article (KB0032936): How to initiate & approve cost transfers, view cost transfers in OFC, and more!

Oracle roles needed to initiate or approve cost transfers

Financial Systems Status

The Financial Information System project team is excited to announce the upcoming release of Oracle Planning and Budgeting in late January 2021. This new release will include a number of new features to support the UC San Diego budget office in furthering a thoughtful design and effectively addressing budgeting challenges.

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We have developed some resources to support the review and de-provisioning process, we have developed some resources to support the review and de-provisioning process.

How to run and view Project Balances with Expenditure Details Dashboard

To support the review and de-provisioning process, we have developed some resources to support the review and de-provisioning process.

Oracle and Concur Access De-Provisioning

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Enhanced Social Ledger Detail Report

The Social Ledger report has been enhanced to include all your shared fund accounts from across all your financial units. To use the report, please log into the Single Project page, where we provide a link to access the UCPath system. To access the UCPath system, please refer to our Knowledge Base Article (KB0032936): How to access the UCPath system.

Special Finance & Reporting Webinar

IPPS will host a second virtual in-person webinar on Payment Compass use, and system navigation. Topics include: how to initiate & approve cost transfers, view cost transfers in OFC, and more!

Special Finance & Reporting Webinar

Attend a University Cost Transfer Training class on Tuesdays at 9:30am to have your questions answered.

UC San Diego delivering a thoughtful design and uniformity across budgeting space within UCPath system will be available as normal: 855-982-7284 (Mon - Fri: 8 am - 5 pm). Center phone access will be available as normal: 855-982-7284 (Mon - Fri: 8 am - 5 pm). Center phone access will be available as normal: 855-982-7284 (Mon - Fri: 8 am - 5 pm). Center phone access will be available as normal: 855-982-7284 (Mon - Fri: 8 am - 5 pm).

Budget & Finance Support

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial space within UCPath system. For report details see Knowledge Base Article (KB0032936): How to run and view Project Balances with Expenditure Details Dashboard! Special thanks to Eva Thiveos and Irvin for their development work.

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