Announcements

New Professional-Quick Payroll Card Transfer Launching December 14

A cost (expense) transfer occurs when expenses are moved from one account to another so that the funds can be used at another account. The new Professional-Quick Payroll Card Transfer feature streamlines this process.

How to Determine the Oracle & Concur Roles

Oracle roles needed to initiate or approve cost transfers are listed on the Oracle and Concur Role Removal Request form. Take this opportunity to review your roles and access and determine if your roles are needed.

Increased Oracle Role Access

We have increased your Oracle role access. Please review your access and let us know if you feel you have the new access, but UCPath still does not have enough access to do your job.

Oracle Planning and Budgeting Go-Live

We are excited to announce that the Budget & Finance Department will move to the Oracle Planning and Budgeting system on Monday, December 14. This system will allow us to develop and maintain a bottom-up budget framework.

Oracle PPM Cost Transfers Launching December 14

A cost (expense) transfer occurs when expenses are moved from one account to another. The new Oracle PPM cost transfer functionality will allow for transfers to be removed when a departmental user separates from employment or to be transferred for budgetary reasons.

Special Finance & Reporting Webinars

Attending these webinars will expose you to new UCPath functionalities and sharpen your skills! Special thanks to Eva Thiveos and Irvin hộp for contributing to our efforts.

University Cost Transfer Training

Register for an upcoming University Cost Transfer Training and you will learn how to transfer budgets, raw costs, committed costs, and revenues done at the sub-ledger level, cost center level, and account level.

The General Ledger Detail report has been enhanced to include new drill down details see Knowledge Base Article (KB0032937):

BI & Financial Reporting Updates

The following resources are available to you for budget and financial reporting:

- Budget & Finance Reports Now Available @ reports.ucsd.edu
- June 9 - 10: Business Intelligence (BI) & Financial Reporting Update
- https://ucsd.zoom.us/j/92802287670

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 process, and the registration process. Sign up for the course via this link.

IPPS will host a second virtual in-person webinar on Payment Compass featuring how to initiate & approve cost transfers, view cost transfers in OFC, and more!

Register for an upcoming University Cost Transfer Training

Paycom Dashboard

This dashboard will be especially helpful for department users. For report details see Knowledge Base Article (KB0032937):

- New Project Balances with Expenditure Details Dashboard
- Enhanced Oracle Ledger Detail Report

The General Ledger Detail report has been enhanced to include line item download functionality. Data can be downloaded from the report into Excel for detailed reconciliation and cost center cost allocation. This report can be found on the General Ledger Detail Report page.

- How to Order Budget Transfers
- Check out our new Training & Engagement Resources

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Oracle and Concur Role Removal Request

Do you have access that is not needed or wanted?
- Go to our Finance Systems Status page, where we provide a one-stop-shop to view and track known issues, provide status updates, share information, and the registration process.
- To support the review and de-provisioning process, we have developed some resources available to you:
- Schedule a meeting with the Oracle Preparers or Access Administrators for an overview of the various types of Oracle roles and access.
- Use the Campus User Roles Report to check for department access, roles, and access level.

Don't miss out on these opportunities to learn more about your financial systems:
- Erin will present a session on campus on Friday, December 9th at 10:00am.
- Attend a session on Friday, December 18th at 10:00am.
- Attend an upcoming University Cost Transfer Training.

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