Announcements

New PPM Cost Transfer Launching December 14

A cost (expense) transfer occurs when expenses are moved from one account to another after the funds have been accounted for in General Ledger (GL). This new PPM Cost Transfer functionality will allow users to move funds directly from one project to another. Single Project to Task, Single Project to Non-Project, and Non-Project to Project are all available for single transfers. For multiple transfers, the new Multi-Project Transfer functionality allows you to select multiple projects and move funds among them.

The following resources are available for you to learn more about the transfer process:

- Watch the Cost Transfer Role Mapping Webinar
- Review the UCPath Intranet Knowledge Base Article (KB0032970)
- View the Cost Transfer Role Mapping Flow Chart

Check out this week’s “How to Transfer” Task Notes! Featuring an in-depth discussion of the underlying system functionality and tools, this series of How tos can be used as a reference guide to help you understand what you need to know, and how to get it done. The notes are designed to give you a better understanding of how existing support tools can be used to move funds between projects.

Upcoming Training: Oracle Planning and Budgeting in the Cloud

Join us for the next in our series of live interactive training webinars on Oracle Planning and Budgeting in the Cloud! This session will focus on key enhancements to the Cloud system that may impact your organization, including a discussion of the new drill-down functionality that will allow you to view and drill-down into financial reports.

Please see the following webinar schedule:

- December 9, 2020 - 10:00 am ET
- December 11, 2020 - 1:00 pm ET
- December 14, 2020 - 6:00 pm ET
- December 16, 2020 - 12:00 pm ET

Webinar details and registration information will be available on the Budget & Finance Report webpage.

Oracle Planning and Budgeting in the Cloud: New Features and Enhancements

This webinar will provide an overview of the new features and enhancements in Oracle Planning and Budgeting in the Cloud. The session will cover:

- New drill-down functionality
- Enhanced forecasting capabilities
- Improved user interface

Attendees will have the opportunity to ask questions and provide feedback.

Oracle Planning and Budgeting in the Cloud: Advanced Features and Capabilities

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Budget & Finance Reports Now Available @ https://ucsd.zoom.us/j/92802287670

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

Attend this session to learn more about UCPath Vacation Accounting & the Budget Space within Finance. We will cover:

- Vacation Accounting functionality
- Budget space overview
- System navigation

Register for Wednesday, December 16, 2020 @ 9:00am - 10:30am for an upcoming University Cost Transfer Training: Watch the Cost Transfer Role Mapping Webinar

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

Oracle and Concur Role Removal Request

E-commerce users have a new resource to help them identify whether or not they need to request the removal of their Oracle and Concur roles.

Oracle Planning and Budgeting Training Courses

Oracle Planning and Budgeting has been in use for over a year now, and we have added two new courses to our offerings. These courses are designed to help users become more proficient in using the Oracle Planning and Budgeting system.

- Oracle Planning and Budgeting 101: Introduction to the System
- Oracle Planning and Budgeting Advanced: Advanced Features and Capabilities

These courses are available on the Budget & Finance Report webpage.

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Check out the New ‘Known Issues’ Tracking Site

The UCPath system is dynamic and evolves over time. As such, it is possible that issues may arise that need to be resolved. The new ‘Known Issues’ tracking site provides a one-stop-shop to view and track known issues, provide status updates, share feedback, and much more!

Oracle and Concur Access De-Provisioning

We are excited to announce that the Budget & Finance Systems Support team has developed some resources available to you:

- E-commerce users, Departmental Preparers, and Budget & Finance Team members to help with the de-provisioning process
- Oracle and Concur Access De-Provisioning Training: Assist users to initiate transfers for transactions from Project to Project, or from Project to Other Budgeting Space.

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