Announcements

New PPM: Quick PPM Card Transfers Launching December 14

A cost (expense) transfer occurs when expenses are moved from one expenditure category to another. After this release you will have access to the new Quick PPM Card Transfers. (Note: this Quick PPM Card transfer functionality will only allow users to transfer costs within the same project. Single Project transfers to other single Projects and Task transfers to other Tasks are not available.)

The following resources are available for you to learn more about this new functionality:

- Watch the Cost Transfer Role Mapping Webinar for an overview of the new cost transfer process:
  - Monday, December 14 at 6 PM
  - UCZoom link: https://ucsd.zoom.us/j/92802287670
- Attend the University Cost Transfer Training:
  - Wednesday, December 16 @ 11:30am - 12:30pm
  - https://ucpath.ucsd.edu
- Watch the Cost Transfer Tutorial:
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New Feature: Oracle PPM Cost Transfers Launching December 14

UCPath Support promotes training, tools, and communications to take full advantage of the financial system. If you have any questions regarding the new functionality or need help with your cost transfer processes, please contact the UCPath Support team.

Upcoming Browser Update: Oracle Planning and Budgeting to Live

This is an important reminder that the upcoming release of Oracle Planning and Budgeting in January 2021 will have some significant changes to its appearance. The purpose is to improve performance and overall and provide a more intuitive interface. Any current active users will have to make some changes to their processes and workflows.

Virtual instructor-led system training for Campus budget preparers will be available to train on the new system. To access the training, please visit https://ucsd.zoom.us/j/92802287670.

Oracle and Concur Access De-Provisioning

This is an important update regarding how to determine the Oracle and Concur roles needed to initiate or approve cost transfers. To assist you with this process, we have created a list of roles and access needed to perform cost transfer actions.

For more information, please visit https://uxpath.ucsd.edu/docs/oracle-access-de-provisioning.

Oracle and Concur Access De-Provisioning

For any questions or suggestions please contact our team directly at the email address provided.

Budget & Finance Digest

December 9, 2020

UC San Diego

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