Getting Ready for Fiscal Close

Our goal is to deliver timely information that matters to you.

Announcements

Upcoming Report Release:

The following enhancements have been released on the Incoming Payments report on the Accounts Receivable Panorama:

Enhancements:

- A new tab has been added to the Default Project Payroll report to simplify creation of DrPat files for users who have access to see detailed UCPath Labor Ledger information such as person name, position, and UCPath chartstring.
- Oracle: Clicking on the Original Transaction Reference number in the Transaction Details report will take you to the DOPES to Transaction Reference number in the DOPES will take you to the Transaction Details report to see where the payroll posted in DOPES - Transaction Details Linkage

Call the UC San Diego Finance Help Line! Knowledgeable agents are standing by to assist you and answer questions

Oracle: Buying and Paying for Financial Unit Approvers

IPPS will be hosting a demo during Office Hours 9:30am – 10:00am Wednesday, June 8, 2022

Please note the processing nonPO payments, and checking invoice status. This course will be especially valuable for individuals responsible shopping for and purchasing goods and services, searching across UC San Diego requisitions and POs, closing POs, 9:00am - 11:00am 11:00am - 12:00pm

Fund Management Office Hours

Watch recorded office hours and more on our current access, please submit a new $5000 without requiring Financial Unit Approval. This functionality has now been updated, and users can have both Journal training will be added to June's RA Training Bootcamp.

FM's are encouraged to use pivot tables in Excel to streamline the reports they need to generate for sponsors. Pivot table reports on the

With the launch of several new or upgraded reports, sponsored project agency billings require less manual work to be done walkthrough of the steps required to approve or dispute an invoice hold are outlined in our newest KBA,

New Release:

- Expanded Project Summary
- Project Costs Detail Report
- DOPE - Sponsor Report
- Accounting Details' provides the account and financial unit associated with the receipt.
- Two table options: 'No Accounting Details' table returns one line per receipt and removes merged cells, while 'With contracts along with payment and chartstring information.
- Receipt Number and Receipt Comments are "contains" searches: Enter partial information (i.e. check number, customer name, contract number, PI name, protocol number etc) in either of these prompts to find receipts related to
- Batch has been added to the GL Transactions table.
- function (Ctrl-F) to find a financial unit by number or name.
- Financial Unit prompt is now a checkbox list, enabling users to select multiple financial units. Use your browser search
- Not sure where to find answers? Get started using our
- Each Tuesday, the Weekly Digest provides important updates related to
- 05/20 Financial Operations Office Hours
- 73rd Edition
- Create and review the
- How to Use PADUA 2.0 KBA
- How to Resolve an
- Chancellor's ESR
- Future releases will allow task
- live demonstration
- This

Tips & Tracks

The Budget Examiner - How to do it Right

For more information watch

Creating a Billing

Business Analytics Hub