Upcoming Report Releases: BI & Fund Panorama

The Budget & Finance department is excited to announce the following January 25th in the Business Intelligence (BI) 54th Edition: Panorama, will offer a single dashboard to help Fund Managers evaluate the Fund. This new report will feature:

- Campus and Foundation Ledger details and balances
- GL and subledger transaction details
- Campus and Foundation Ledger details and balances
- PPM Module project/task reporting
- Budget and Financial Management Reports Panorama
- General Ledger Panorama

The new Gift Fund Panorama, which will be available starting January 25th in the 54th Edition: Panorama, will offer a single dashboard to help Fund Managers evaluate the Fund. This new report will feature:

- Campus and Foundation Ledger details and balances
- GL and subledger transaction details
- Campus and Foundation Ledger details and balances
- PPM Module project/task reporting
- Budget and Financial Management Reports Panorama
- General Ledger Panorama

For a sneak preview, watch a recorded demo on the IPPS resources.

In an effort to assist Funding Entry Transactors in UCPath, we've adopted WalkMe for use with the Funding Entry page. WalkMe is a Digital Adoption Platform that will support users by providing context-sensitive hints to guide them through completing tasks. It is recommended that you also attend the "Instructor-Led Training sessions, and Hot Topics." This will help ensure that appropriate chartstrings are being entered correctly. This will reduce subsequent clean-up efforts such as Direct Retros and Cost Transfers when chartstrings are entered incorrectly.

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