What’s New In FinancialLink
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What’s New In FinancialLink

Goals for today

• Summarize changes from last year
• Show recent changes to FinLink
• General Q&A and demonstration
What’s New In FinancialLink

Changes announced in March 2009

• Transition from Sybase to DB2 backbone
• New Look & Feel for FinLink Reports
• Improved Ledger Reviewer
• Cost Center Management
• MyFunds “View Related FM Profiles”
• Salary & Expense Projections Maintenance
What’s New In FinancialLink

New Changes in FinLink

• Review updates in Quarterly Release Notes:
  • https://www-act.ucsd.edu/financialLinkWiki/attach/FinancialLinkWiki/ACT_Financial_Team_Releases.docx
What’s New In FinancialLink

New Changes in FinLink

• Cost Center Management:
  – Projects at the Fund/Org & Fund/Org/Program level
  – Mass Role Update to include Mass Add & Delete
  – Chart of Account Override at the F/O & F/O/P level
  – Chart of Account Override for multiple indices
New Changes in FinLink

- Index Management:
  - Create a sub index number
  - Update Early Index Inactivation
  - Update Index Title
  - Re-active an index number
What’s New In FinancialLink

New Changes in FinLink

• MyFunds:
  – Transfer of ownership between Fund Managers
  – Option for revenue reporting
  – Improved payroll projections formatting
  – Improved distribution of payroll expense formatting
New Changes in FinLink

• **Transaction Sampling:**
  - Improved performance and stability
  - Targeted profiles
Demonstration

- CCM training is available on Blink:
  - http://blink.ucsd.edu/finance/tools/CCM.html

- Live Demo in FinLink
What’s New In FinancialLink

Coming Soon:

- Index Management – Deactivate index number
- Improved ENPET stability & formatting
- On-line training for Expanded Budget Summary
Q&A

• When can MyFunds be run by Organization?
  – Projects can be created at the F/O or F/O/P. ACT won’t add an option to add an entire org by itself.

• Is it possible to remove old fund manager names from the ledgers?
  – Yes. CCM now allows changes for FMs that are separated

• How can you mask payroll information for FinLink & MyFunds reports?
  – Your DSA can remove FinancialLink Payroll Data Access and this will prevent FinLink or MyFunds from showing payroll.
Q&A

- Local Transactions – Import/Export
- Explain bi-weekly accrual
- Payroll Projections Overview
- Which QueryLink queries do I use most often?
  - The group used the following queries: DOPES, Employee, Contracts & Grants, Accounts Receivable, Statement of Operations, Operating Ledger Detail Transaction, Graduate SAM data & some of the Student queries.
- Is there a query that displays multiple monthly balances?