

# What's New In FinancialLink April 2010

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Staff Education and Development

# 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](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**

# What's New In FinancialLink

## 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**

# What's New In FinancialLink

## New Changes in FinLink

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



# What's New In FinancialLink

## 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**

# What's New In FinancialLink

## 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.

# What's New In FinancialLink

## 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?**