



ADDY TIPS



UCF Rising Updates for UCF Financials

On November 7 Financials Support Services (FSS) implemented the Grants module as a part of the UCF Rising project. New features were installed in UCF Financials that automated many accounting tasks associated with grants and other projects. The tips below provide important information that impacts system users.

Note: All November transactions in UCF Financials can be created beginning November 7.

Key Changes to UCF Financials

Project Requisitions

- Project requisitions cannot be copied if they were created prior to November 1.
- *Note: Requisitions assigned to a Department can be copied.*

Human Capital Management (HCM)

- All salary transfers MUST now be entered in the Human Capital Management (HCM) PeopleSoft system, not in UCF Financials. If you need access to the HCM system, contact your HR liaison.
- Reports on payroll must be run in the HCM PeopleSoft system. Detailed payroll information is no longer available in UCF Financials.

Grants

- All grant funding is managed by a Project code, not a Department. Department codes do not include grant funding.
- Analysis types included on project transactions help to differentiate between chargeable projects and cost-share/match projects.

Purchase Orders

- Project purchase orders (POs) were rolled as of November 1. The ones associated with sponsored research now reflect the new GRANT Activity ID.
- Project POs created prior to November 1 (or rolled) cannot be reopened due to a change in budget ledgers.



ADDY TIPS



- Project history will NOT be converted in the various subsystems (AP, REQ, PCard), so you will not see Activity ID GRANT on transactions prior to November 1 in these modules.

General Ledger

A new offline journal template MUST be used. This template will be used in the upload process for traditional and Standard Budget Ledger journals. An updated Addy Note – “Uploading a Journal Created from a Template” – became available November 7 on the FSS website.

***Note:** Upgrades to the General Ledger (GL) journal upload process require users to have Windows 10.*

Budget Ledgers

Budget ledgers have changed for research-only projects. There are now two different ledgers for current projects. One of those ledgers (CH_PG_BUD) holds non-sponsored budgets as well as research budgets prior to November 1.

Sponsored project parent/child ledgers follow:

- CC_PGRT_CH (Track at the child level)
- CC_PGRT_PT (Control at the parent level)