System and Tools Deprecation Notice: Permanent Budget System and
Online Transfer of Funds (OLTF)

As previously communicated, the Permanent Budget & Staffing System and the
Online Transfer of Funds System (OLTF) have been deprecated as of July 1st,
2020. Historical budget and staffing data as well as OLTF information will
continue to be accessible via the BudgetLink application.

Deprecation and Alternatives

Previously termed Permanent Budget, now called Recurring Budget, starting
with fiscal year 2021 and beyond will be available within the Oracle Planning
and Budgeting Cloud Service (EPBCS). EPBCS budgets will be used to seed
the total budget in Oracle Financials Cloud (OFC) General Ledger.

There is no replacement for the OLTF tool as budgets are no longer
transactional and represent a financial plan. The OLTF tool is now replaced
with financial journal entries in the Oracle General Ledger.

For resources to help you locate your FY21 recurring core funds budget see our
Budget & Planning Knowledge Base.

Planning and Budgeting Cloud

Upcoming Releases: Oracle Planning and Budgeting Go-Live

The campus is excited to announce the upcoming release of Oracle Planning
and Budgeting in late January 2021! This new system will make way for a
bottom-up budget development for UC San Diego delivering a thoughtful
design and uniformity across budgeting moving forward.

With Oracle Planning and Budgeting, you will be able to perform web based
entries for core and other campus unrestricted funds planning serving as a
comprehensive budget plan.

Oracle Planning and Budgeting User Role and Access

Preliminary Budget Users have been identified and will be provisioned access
to the system for upcoming training beginning late January. Budget Users are
those assigned by their department with responsibility to create and manage
financial unit budgets. We are actively working with your Vice Chancellor Office
to assign access.

Not sure if you’re responsible for preparing the budget for your Financial Unit in
the Oracle Planning and Budgeting system? Please contact your Vice
Chancellor Office.

Training & Resources

Virtual instructor-led system training for Campus budget preparers will be
available in late January. To prepare for training, visit Budget & Finance
Training Courses and take the 5 short Budget eCourses under “Fundamental
eCourses” (will take less than an hour for all 5) to get a sneak peak of the
Oracle Planning and Budgeting tool.

Subject Matter Experts (SMEs) from your VC areas are currently being trained
and will be ready to assist with live, virtual trainings starting in the New Year.
Stay tuned for registration information for those sessions.

Where to go for additional information on training, go-live schedule and your
role? Read more on the details here Oracle Planning and Budgeting.

About the Budget Bulletin

The Budget Bulletin is delivered to budget
preparers and Financial Officers to share
information and important updates related to Oracle
Planning & Budgeting in preparation for go-live.

For knowledge base articles or to submit a question, please visit the Budget and
Planning section of the UC San Diego Services & Support portal.

Budget & Finance Support promotes training, tools, and communications to take full advantage of the financial
information system and support departments’ success in managing their fiscal responsibilities.

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