**Announcements**

New PPM - Quick PPM Cost Transfers Launching December 14

A cost (expense) transfer occurs when expenses are moved from one expenditure account to another. This new system will make way for a bottom-up budget development for the upcoming year. This new functionality will allow users to initiate transfers for transactions from Project to Project, re-allocate expenses between projects, balance the general ledger, and prepare for the upcoming release of Quick PPM Cost Transfers to all UC employees during the Amazon Web Services (AWS) cutover. During the AWS cutover, users will be able to perform cost transfers at any time. Following a thorough design process, we are offering a new budgeting feature.

If you wish to request cost transfers in your requestor PPM in the Currency Transfer sub-package, you need to create development records in your PPM environment. Please refer to the following steps:

1. **Create Development Records**
   - Open the PPM application.
   - Navigate to the development records module.
   - Create the necessary development records for each project or organization.

2. **Run Test Transfers**
   - Run test transfers using the new development records.
   - Verify that the transfers have been processed correctly.

3. **Contact Support**
   - Contact the UC Budget & Finance Support team for any questions or support.

For any suggestions on enhancements, we welcome your feedback. Please submit a ticket to the UC Budget & Finance Support team via the ticketing system. We appreciate your feedback and support as we continue to improve our processes and systems to provide the best possible service.

**Upcoming Release: Oracle Planning and Budgeting in Live**

The General Ledger Detail report has been enhanced to include new drill down functionality so users can trace from General Ledger summary level detail back to detailed transaction line item information and original source documentation. This enhancement will make it easier for users to understand the financial transactions and their sources.

New Feature: Oracle PPM Cost Transfers Launching December 14

The new Oracle PPM cost transfer functionality will allow users to transfer accounting distribution to another after they have been recorded in Oracle. This feature is designed to streamline the cost transfer process, making it faster and more efficient. The new functionality will be available for the upcoming year, and we encourage all users to take advantage of this new feature to improve their financial processes.

For more information, please visit the Oracle PPM documentation page, where we provide a detailed explanation of the new feature.

**Oracle and Concur Role Removal Request**

We have developed some resources available to you:

- **Oracle and Concur Access De-Provisioning**
  - Please be aware that user roles and access need to be reviewed by Oracle and Concur prior to de-provisioning. To support the review and de-provisioning process, we have developed a Campus User Roles Report.
  - This report provides a comprehensive list of Oracle and Concur roles, permissions, and access for all users.
  - Sign up for the report to receive weekly updates via email.

- **Oracle Planning and Budgeting tool**
  - Stay tuned for future communications with available eCourses' (will take less than an hour for all 5) to get a sneak peak of the new release.
  - Visit the eLearning portal for more information.

- **Oracle Planning and Budgeting System Training**
  - Register for an upcoming University Cost Transfer Training. This training will provide a general overview of the new cost transfer functionality, including how to initiate & approve cost transfers, view cost transfers in OFC, and more!
  - Register for Monday, December 14, 2020 @ 1:30pm - 3:00pm for a hands-on demonstration of the new functionality.

For more information, please see this preliminary list of resources available in late January. To prepare for training, visit the virtual instructor led system training for Campus budget preparers in the upcoming release of Oracle Planning and Budgeting. We encourage all users to take advantage of this training to better understand the new features and functionality.

The Financial Information System project team is excited to announce the upcoming release of the Financial Information System (IFS) in late January 2021. This release will include new capabilities and enhancements that will improve our users’ ability to perform their financial processes. We are confident that this release will provide a better user experience, improve our users’ productivity, and enhance our users’ ability to provide accurate financial information.

Please note that user roles and access need to be reviewed by Oracle and Concur prior to de-provisioning. To support the review and de-provisioning process, we have developed a Campus User Roles Report.

For more information, please visit the Oracle Planning and Budgeting System Training page, where we provide a detailed explanation of the new feature.

**Training & Engagement Resources**

- **Budget Transfer Training**
  - Register for an upcoming University Cost Transfer Training. This training will provide a general overview of the new cost transfer functionality, including how to initiate & approve cost transfers, view cost transfers in OFC, and more!
  - Register for Monday, December 14, 2020 @ 1:30pm - 3:00pm for a hands-on demonstration of the new functionality.

- **Oracle Planning and Budgeting System Training**
  - Register for an upcoming University Cost Transfer Training. This training will provide a general overview of the new cost transfer functionality, including how to initiate & approve cost transfers, view cost transfers in OFC, and more!
  - Register for Monday, December 14, 2020 @ 1:30pm - 3:00pm for a hands-on demonstration of the new functionality.

For more information, please see this preliminary list of resources available in late January. To prepare for training, visit the virtual instructor led system training for Campus budget preparers in the upcoming release of Oracle Planning and Budgeting. We encourage all users to take advantage of this training to better understand the new features and functionality.

The Financial Information System project team is excited to announce the upcoming release of Oracle Planning and Budgeting in late January 2021. This release will include new capabilities and enhancements that will improve our users’ ability to perform their financial processes. We are confident that this release will provide a better user experience, improve our users’ productivity, and enhance our users’ ability to provide accurate financial information.

Please note that user roles and access need to be reviewed by Oracle and Concur prior to de-provisioning. To support the review and de-provisioning process, we have developed a Campus User Roles Report.

For more information, please visit the Oracle Planning and Budgeting System Training page, where we provide a detailed explanation of the new feature.

**Oracle and Concur Role Removal Request**

We have developed some resources available to you:

- **Oracle and Concur Access De-Provisioning**
  - Please be aware that user roles and access need to be reviewed by Oracle and Concur prior to de-provisioning. To support the review and de-provisioning process, we have developed a Campus User Roles Report.
  - This report provides a comprehensive list of Oracle and Concur roles, permissions, and access for all users.
  - Sign up for the report to receive weekly updates via email.

- **Oracle Planning and Budgeting tool**
  - Stay tuned for future communications with available eCourses' (will take less than an hour for all 5) to get a sneak peak of the new release.
  - Visit the eLearning portal for more information.

- **Oracle Planning and Budgeting System Training**
  - Register for an upcoming University Cost Transfer Training. This training will provide a general overview of the new cost transfer functionality, including how to initiate & approve cost transfers, view cost transfers in OFC, and more!
  - Register for Monday, December 14, 2020 @ 1:30pm - 3:00pm for a hands-on demonstration of the new functionality.

For more information, please see this preliminary list of resources available in late January. To prepare for training, visit the virtual instructor led system training for Campus budget preparers in the upcoming release of Oracle Planning and Budgeting. We encourage all users to take advantage of this training to better understand the new features and functionality.

The Financial Information System project team is excited to announce the upcoming release of Oracle Planning and Budgeting in late January 2021. This release will include new capabilities and enhancements that will improve our users’ ability to perform their financial processes. We are confident that this release will provide a better user experience, improve our users’ productivity, and enhance our users’ ability to provide accurate financial information.

Please note that user roles and access need to be reviewed by Oracle and Concur prior to de-provisioning. To support the review and de-provisioning process, we have developed a Campus User Roles Report.

For more information, please visit the Oracle Planning and Budgeting System Training page, where we provide a detailed explanation of the new feature.