



ONE
CONNECT



Log In Instructions

How To Log In To Oracle Cloud

Step 1:

- Open your web browser
- Click on the Dev environment link → <https://iayzqy-dev4.fa.ocs.oraclecloud.com/> or add in your browser

Step 2:

- Click on 'Company Single Sign-On' button.
- You will be redirected to your company's Single Sign-On (SSO) page.

Step 3:

- Enter your organization email address
- Enter your network password (the same password you use for Outlook)
- Click 'Sign In'

Step 4:

- Once verified, you'll be redirected to the Oracle ERP Cloud home page



Shelby County Tennessee (IAYZQY-DEV4)

Shelby County ERP and HCM Sign In

Identity domain ⓘ

fa-iayzqy-dev4-slu2j

User Name

Password

[Forgot Password?](#)

Sign In

Or sign in with



Shelby County She...



Shelby County Gov...

[Need help signing in?](#)

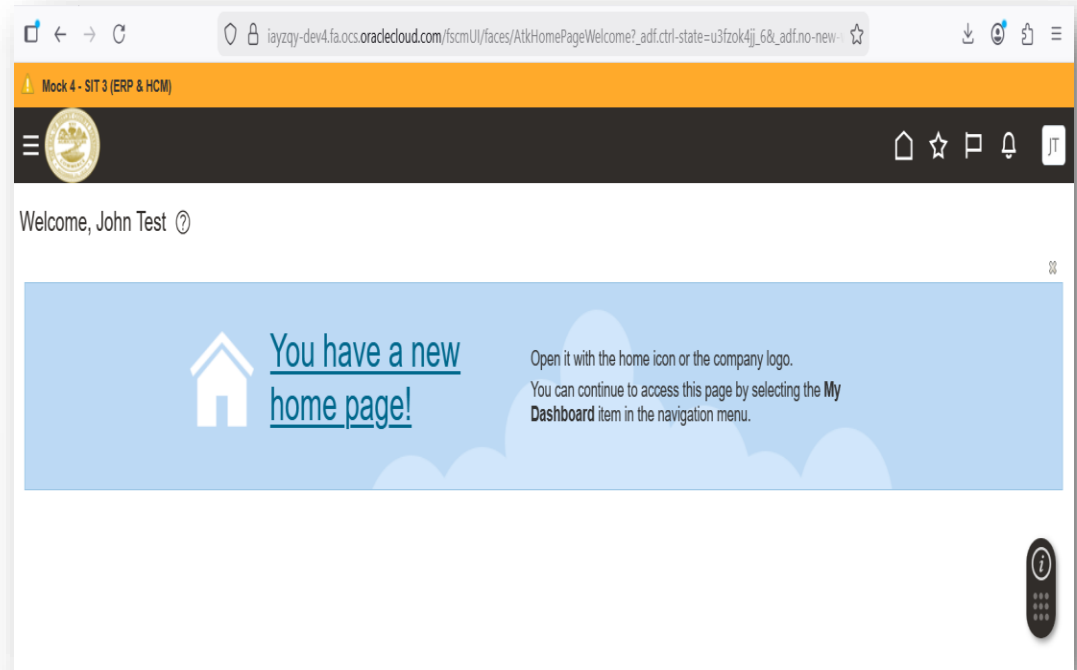
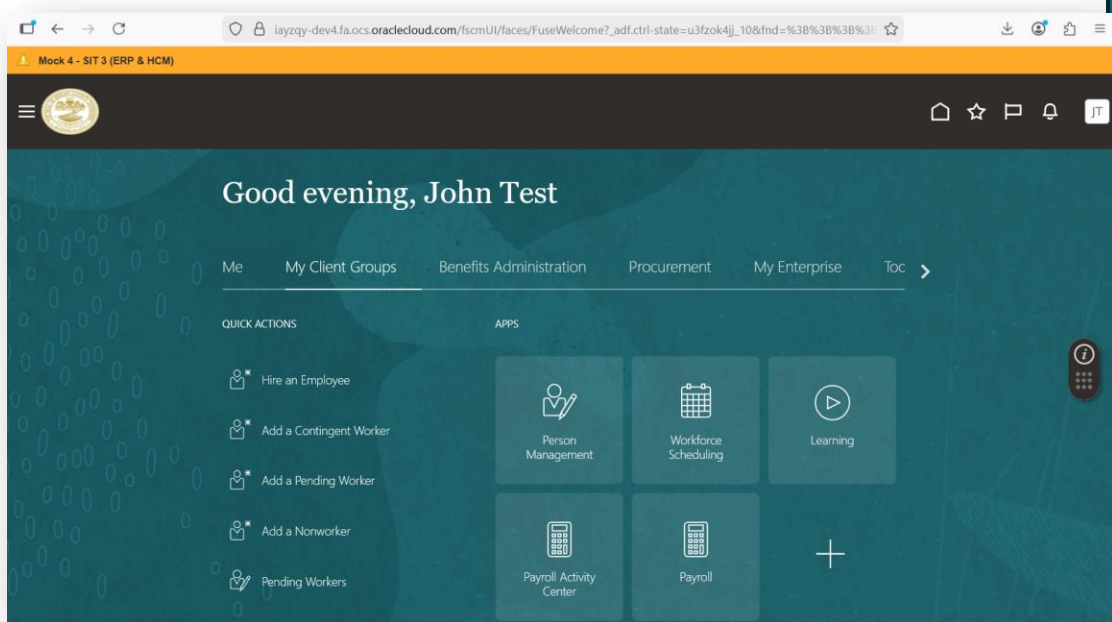


English



How To Log In To OneConnect Oracle Cloud

- **Step 5:** After logging in, you will see the Oracle ERP Cloud dashboard.
- **Step 6:** Click on the 'You have a new home page!' link to view the home screen.



- **Step 7:** Click on icons or tiles to open specific applications.



Ground Rules

Identify how we will work well together today.



Ground Rules



Be Present/Participate



One conversation at a time



Stay on topic (Parking Lot)



Cell Phones on Silent



No Texting Please



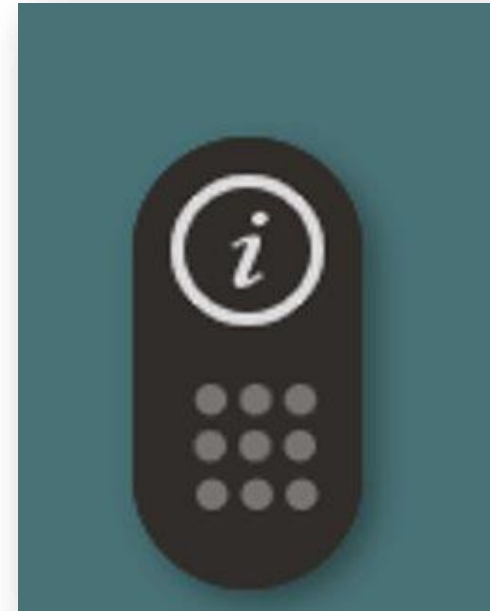
Back from Breaks on Time



Have FUN!

Using Oracle Guided Learning (OGL)

- After logging into the application, you will see the OGL icon on the right side of the page
- This widget contains embedded instructions for all processes. Click the "i" to view available guides.
- Use the Search field to search for a specific guide or navigate through the list.
- Click directly on a guide name to launch step by step directions.
- Note: guided learning must begin on the home screen.





Overview: Project Portfolio Management(PPM)



Today's AGENDA

Technology, Processes & People

- Welcome & Introductions
 - Review Today's Agenda
- Overview:-
 - What it is, why it is important
 - Process & Subprocesses
- Navigation
 - Terms & Terminology
 - Navigating from Home Page
 - Using Oracle Guided Learning (OGL)
- Oracle – Project and Portfolio Management(PPM)
- Closing
 - Summary
 - Q & A
 - Evaluation
 - Next Steps

Projects :

- 1.Create Capital Projects
- 2.Import and Review CIP Project Cost
- 3.Review Accounting for CIP Project Cost

Grants :

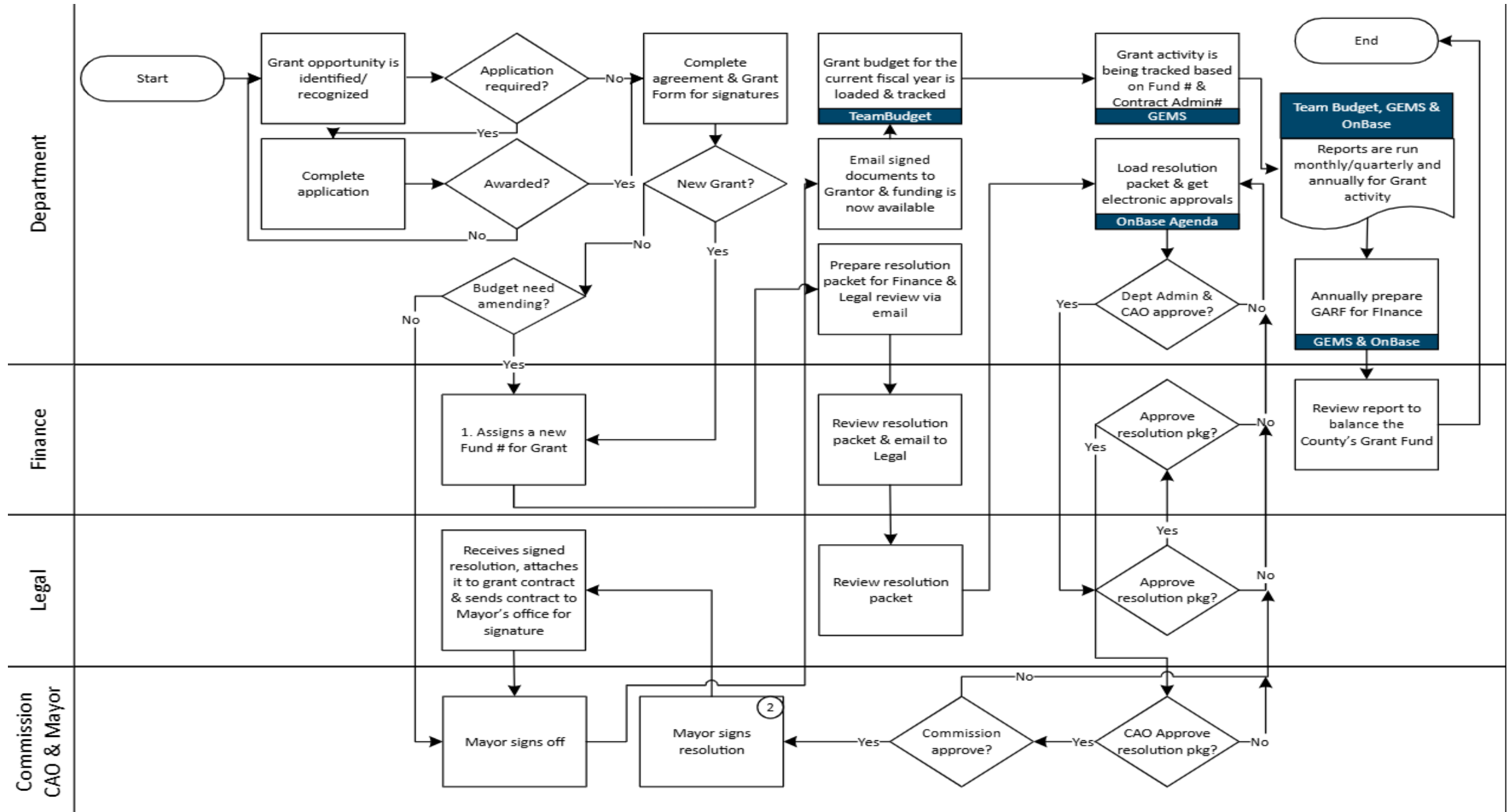
- Create Federal award with single project and roll forward budget spanning multiple years

Grants Management

Grants Management helps organizations manage funding received from external sponsors such as federal, state or private agencies to support specific projects or programs.



Current Process – Grant Management



Create Federal award with single project and roll forward budget spanning multiple years:

A Federal Award is created for Funding received from a federal Sponsor and is associated with one single project.

The award budget spans multiple years, and any unspent budget from one fiscal year is rolled forward to the next year automatically . This allows project to continue without creating new projects each year. This setup is commonly used for long term federal grants that run for several years under one agreement .

Steps:

- Create Federal Award from Template
- Create Sponsored Project
- Associate Fund value to the Sponsored Project
- Submit the Project for Approval
- Associate Project to the Award
- Create Funding and Associate the Funding to the Project
- Create Cost Budget - Create Budget Lines Manually
- Submit Budget for Approval
- Submit Contract

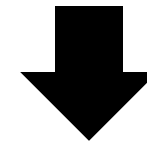
Steps:

1. Create Federal Award from Template :

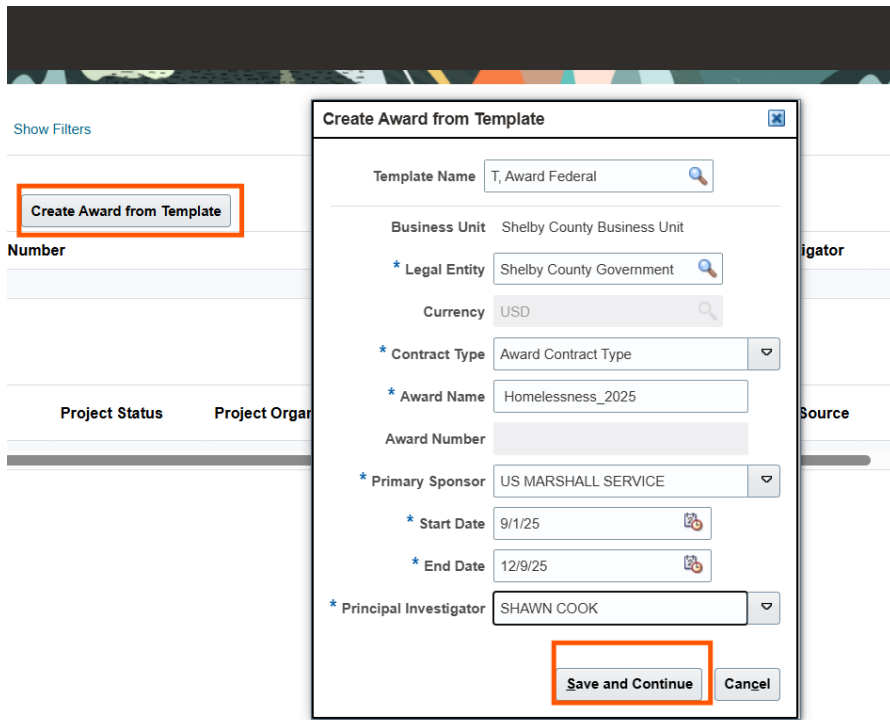


1. Click Navigator

2. Go to Grants Management



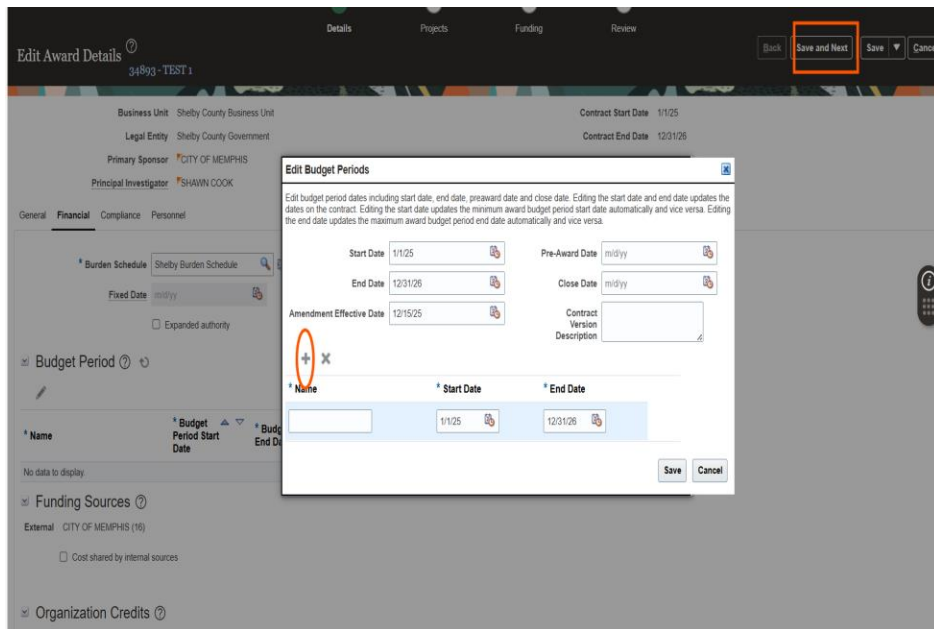
3. Click Awards



4. Click On Create Award from Template

5. Enter all Required Fields

6. Click on save and Continue



2. Create Sponsoring Project

Create Project

* Source Template T, Federal Award-Contract Proj

* Project Name 30577-481717-HOME DELIVERED MEA

* Project Start Date 12/9/25

Project Finish Date m/d/yy

* Organization 200301-CAO-ADMINISTRATION

* Grant Type 4330-Grants-State of Tennessee

* Project Manager Reddy, Sravya

* Budget Approver Reddy, Sravya

* Invoice Approver Reddy, Sravya

Additional Information

SC Fund

EPM Project Number

Save and Continue Cancel

1. Click Navigator

2. Go to Projects-Projects Financial Management

3. Go to Task Panel

4. Go to Initiate-Create Project

5. Fill required details.

6. Click save and continue

3. Associate Fund value to the Sponsored Project

1. Click Navigator
2. Go to Projects- Projects financial Management
3. Click on Filters
4. Select the Project
5. Go to Manage Financial Project settings
6. Click on Additional Information
7. Enter SC Fund
8. Click Save

The screenshot displays a project management application interface. At the top, there's a search bar for 'Project Name or Number' and a filter for 'Project Manager: Reddy, Sravya'. Below this is a table of projects. The first row is highlighted, and its 'Additional Information' column is expanded, showing a dropdown menu with 'Manage Financial Project Settings' selected. A large black arrow points from this menu item to the 'Manage Financial Project Settings' page below. This page has several tabs: 'General', 'Parties', 'Planning', 'Financial', 'Capital', 'Reporting', 'Additional Information', and 'Cost Rate Overrides'. The 'Additional Information' tab is active, showing a form with an 'SC Fund' dropdown menu set to '30114' and a 'Save' button. A red box highlights the 'SC Fund' dropdown, and another red box highlights the 'Save' button. The page title is 'Manage Financial Project Settings 30577-481717-HOME DELIVERED MEALS'.

Project Name	Project Number	Overall Health	Project Status	Project Manager	Customer
30577-481717-HOME DELIVERED MEALS	FED-10523		Draft	Reddy, Sravya	12
TEST CIP 1	CIP-10089		Draft	Reddy, Sravya	11
TestCIP1	CIP-10084		Active	Reddy, Sravya	1/
Test_SR_CIP	CIP-10001		Active	Reddy, Sravya	1/

4. Submit the Project for Approval

Manage Financial Project Settings 30577-481717-HOME DELIVERED MEALS

General Parties Planning Financial Capital Reporting Additional Information Cost Rate Overrides

Basic Information

Project Name
Project Number
Organization

Description

Show More

Project Classification

View

Class Category

Grant Type

Attachments

View

Type

No data to display.

Columns Hidden 1

Change Project Status

From Draft

* To Submitted

Comments

Include attachments in the workflow

Change History

From	To	Last Updated Date	Last Updated By	Comments
	Draft	12/9/25 8:36 AM	Harsha.V@shelby...	
Draft	Submitted	12/9/25 8:47 AM	Harsha.V@shelb...	

Save and Close Cancel

Start Date 12/9/25

Finish Date 12/11/23

Project Status Draft **Change Status**

Sponsored Project Yes

Attached By Attached Date

1. Go to Manage Financial Settings

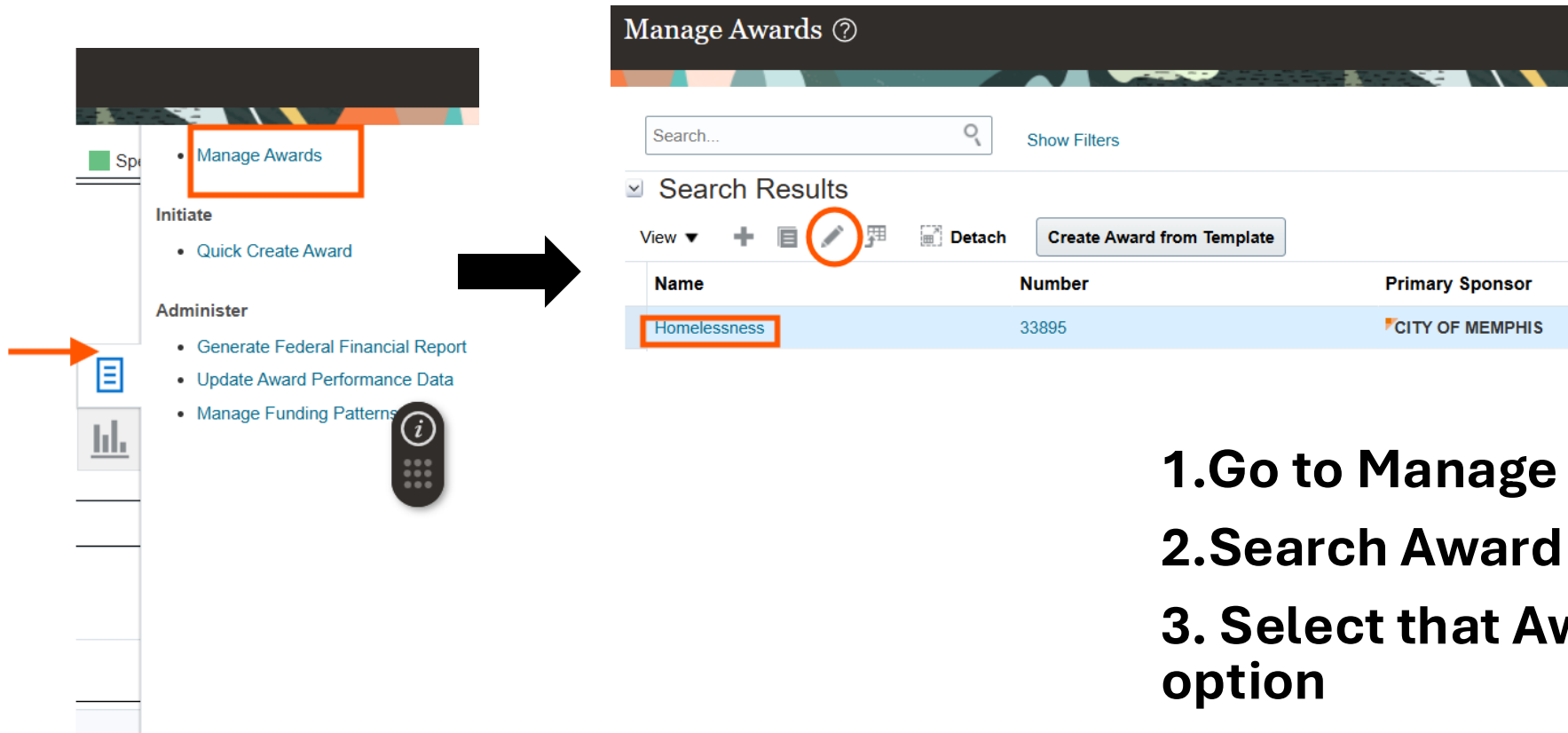
2. Click on General Info Tab

3. Change Project status to Submitted

4. Project has been Submitted, sent for Approval Level.

5. Associate Projects to the Award

We Associate Project to the Award so sponsor funding can be used for that project



The screenshot shows the 'Manage Awards' interface. On the left, a sidebar menu has 'Manage Awards' highlighted with an orange box. Below it, under 'Initiate', is 'Quick Create Award'. Under 'Administer', there are options for 'Generate Federal Financial Report', 'Update Award Performance Data', and 'Manage Funding Patterns'. An orange arrow points to the 'Manage Awards' menu item. A black arrow points from the sidebar to the main content area. The main content area has a search bar with 'Search...' and a magnifying glass icon, and a 'Show Filters' link. Below the search bar is a 'Search Results' section with a dropdown arrow, a plus sign, a list icon, an edit icon (circled in orange), a calendar icon, and a 'Detach' button. A 'Create Award from Template' button is also present. Below these are three columns: 'Name', 'Number', and 'Primary Sponsor'. A table row is shown with 'Homelessness' in the 'Name' column (highlighted with an orange box), '33895' in the 'Number' column, and 'CITY OF MEMPHIS' in the 'Primary Sponsor' column. An information icon (i) is visible in the bottom right corner of the sidebar area.

1. Go to Manage Awards
2. Search Award Name
3. Select that Award, click Edit option

The screenshot shows a web application interface for 'Manage Award Projects' with the subtitle '33895 - Homelessness'. At the top, a progress bar indicates four steps: 1. Details (checked), 2. Projects (highlighted with a red circle), 3. Funding, and 4. Review. Below the progress bar, there are buttons for 'Back', 'Save and Next' (highlighted with a red box), 'Save', and 'Cancel'. The main content area features a table with columns: '* Project Name', 'Project Number', 'Funding Source', 'Project Status', 'Project Manager', 'Project Start Date', and 'Project Finish Date'. The 'Project Name' column contains a dropdown menu, which is highlighted with a red box. Below the table, there is a 'Details' link.

- 4. Go to Project Tab
- 5. Link Project to the Award
- 6. Click save and next....

6. Create Funding and Associate the Funding to the Project

1. Click on Funding
2. Fill Required Details
3. Click Save and close.

Manage Award Funding 33895 - Homelessness

Funding Summary

Funding Allocation

Funding Graphs

Add Funding

Budget Period BP 1 4/1/25 - 12/9/25

Funding Source CITY OF MEMPHIS (16)

Funding Issue Details

Type Base Supplement

* Number 10000

* Date 12/9/25

Description

Direct Funding Amount 10,000.00 USD

Indirect Funding Amount 10,000.00 USD

Total Funding Amount 20,000.00 USD

Project Funding Allocation





* Project Name	Project Number	Funding Amount (USD)
30133-271006-HOUSING	FED-10258	20,000.00
Total		20,000.00

Save Save and Close Cancel

7. Create Cost Budget - Create Budget Lines Manually

Manage Budget Versions TEST PROJECT 2 ?

Award 34893 | Currency = USD

Actions    

No data to display.






Edit Budget: Version 1 TEST PROJECT 2

Award 34893

* Name Version 1 Display Task structure

SC_Awards Cost Only Plan Planning Options Cost Budget
Planning Level: Project Attachments: None \$0.00

Actions View    Filter Detach Go to Task Layout Budget Lines

Task Number or Resource	Task Name	Funding Source	Quantity	Raw Cost (USD)	Raw Cost Rate (USD)
FED-10627	TEST PROJECT 2				

1.Capital Project

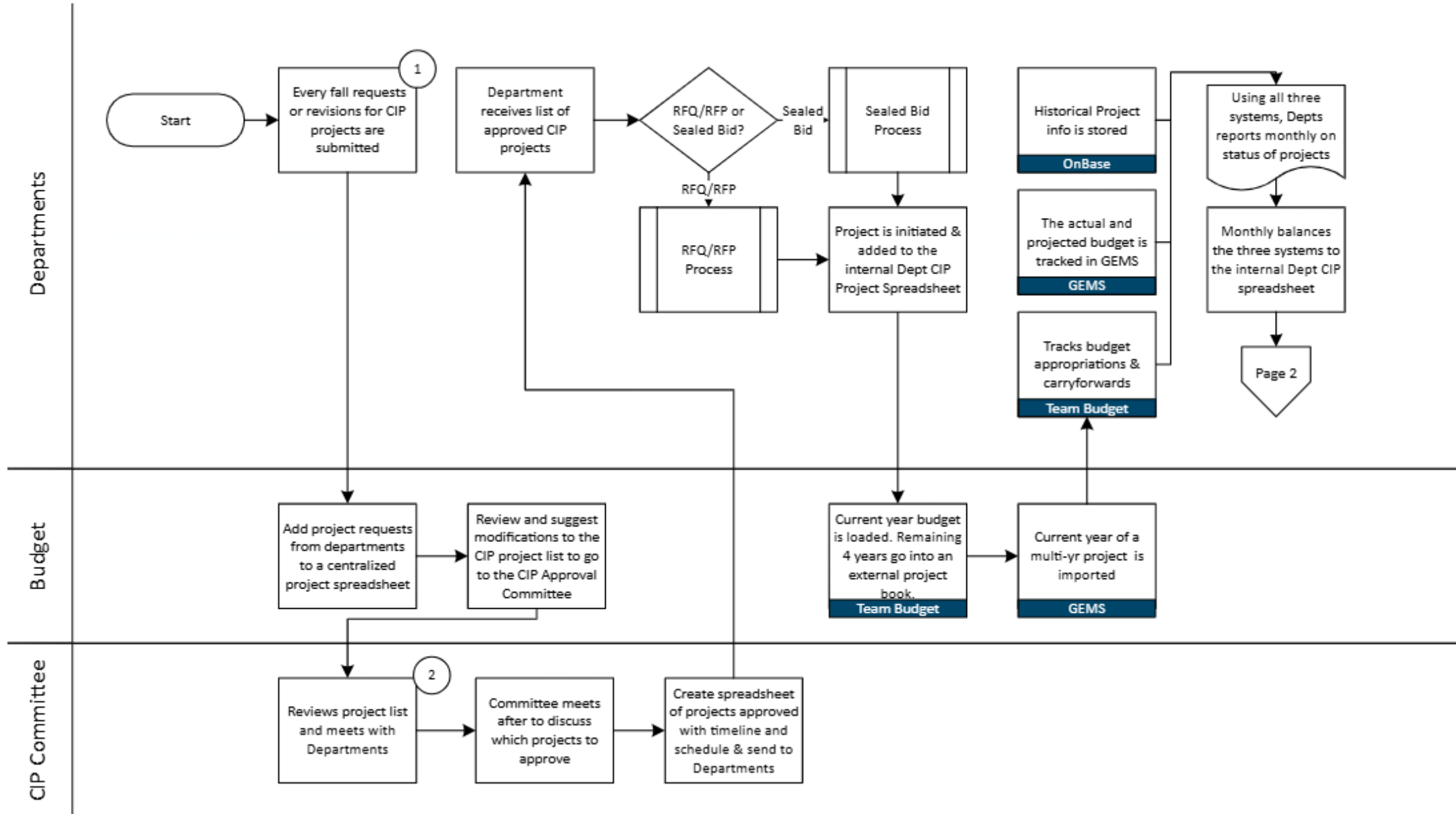
Capital Project Creates Long term Asset and cost will be directly go to the Fixed Assets.

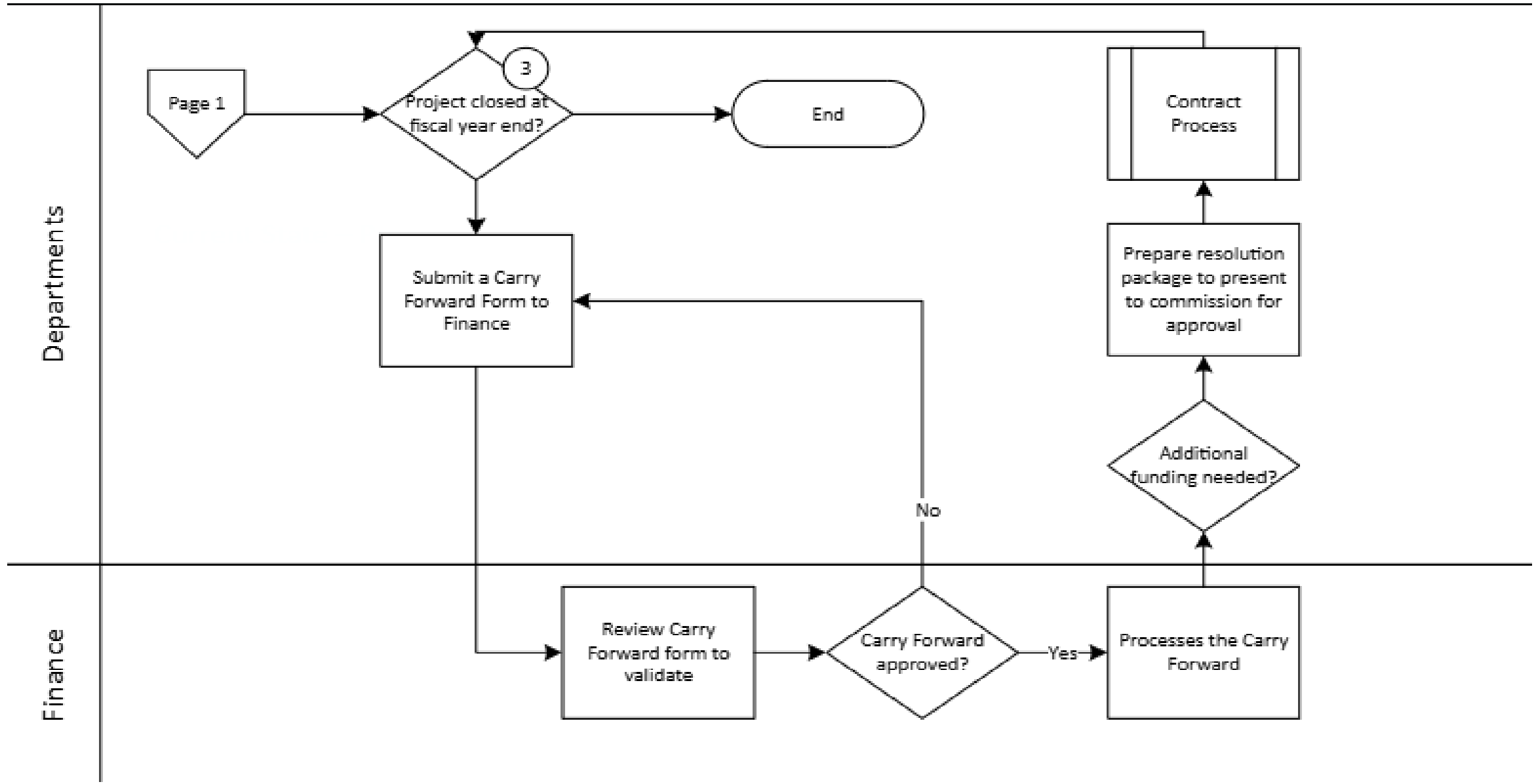


Types of Capital Projects :

- 1. New Construction Projects** : Buildings , Roads, Hospital, Airports
- 2. Renovation Projects** : Renovation of Government Buildings
- 3. Infrastructure Projects** : Water Systems, Power Plants
- 4. IT Capital Projects** : Data Centers, Purchase and install servers.
- 5. Land & Facility Development Projects** : Parking lot construction, Stadium Improvements

Current Process- Capital Projects





Departments

Finance

Creating a capital project includes the following steps:

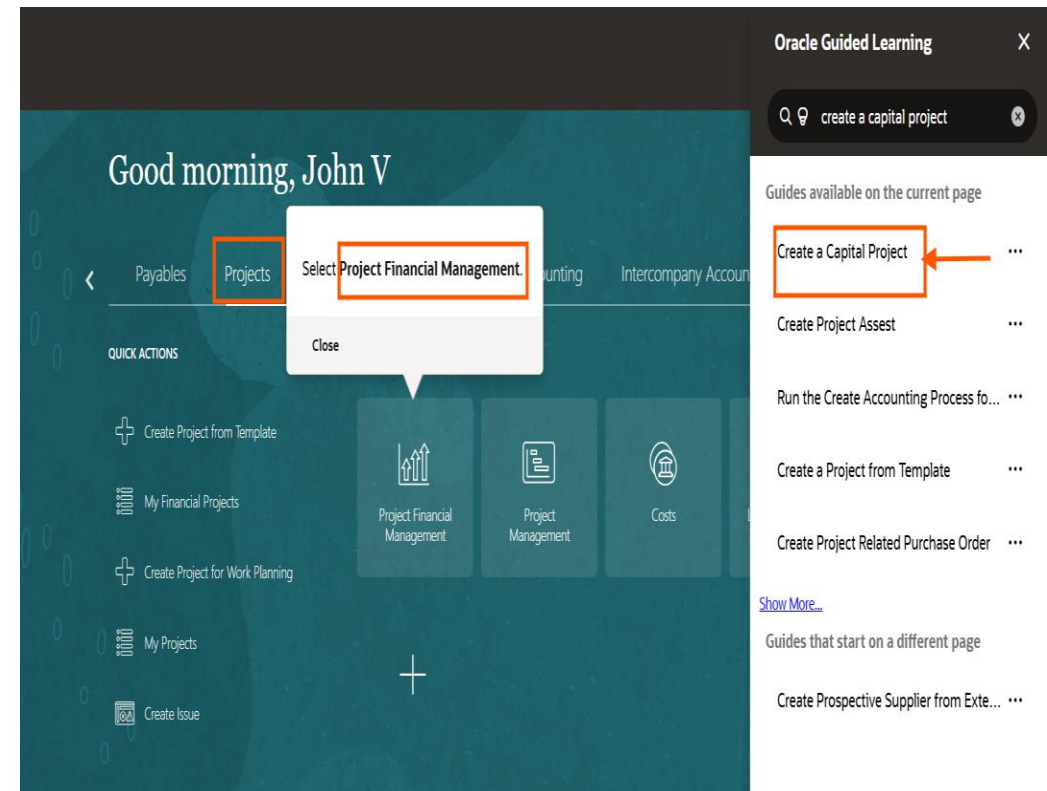
- Create Project by using CIP Template
- Associate Fund value to the CIP project
- Submit and approve project
- Approve Project with Project Approval Workflow
- Notification of Approved Project Status Change Approval Workflow
- Create Cost Budget - Create Budget Lines Manually
- Submit Budget with Budget Approval Workflow

Step 1: Create Project by using CIP Template

- A CIP template is a ready-made setup used to create capital projects easily.
- It already contains default project Structure , tasks, financial and asset settings.

Navigation :

1. Projects > Projects Management



2. Click Create Project From Template

3. Select the CIP template, enter Project Name, Dates, BU. Then click save and continue.

My Projects ?

Project Name or Number Show Filters

View **+** Detach

Project Name	Project Number	Overall Health
30231-400427-ENVIRONMENTAL...	ST-10047	
TEST CIP 1	CIP-10089	
test	CIP-10086	
test1		
test2		
test3		
test4		

Create Project

* Source Template ?

* Project Name

* Project Start Date ?

Project Finish Date ?

* Organization ▾

* CIP Project Type ▾

* Project Manager

* Budget Approver

▲ Additional Information

SC Fund

EPM Project Number

Save and Continue Cancel

Enter key criteria, then select Save and Continue.

Close

Organization

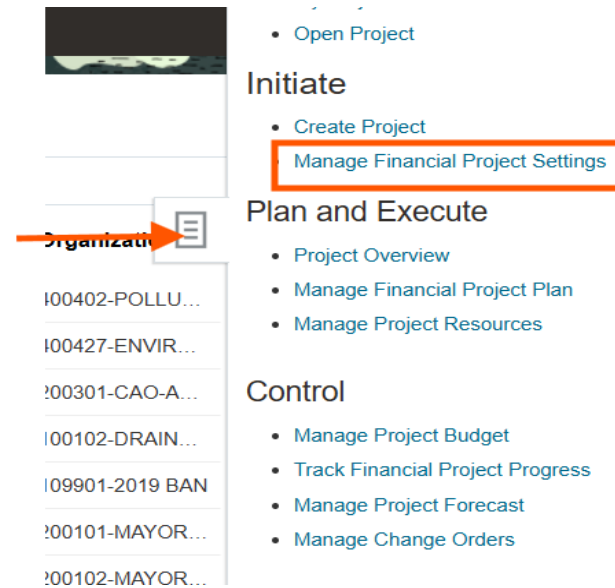
- 400427-ENVIR...
- 200301-CAO-A...
- 100102-DRAIN...
- 109901-2019 BAN
- 200101-MAYOR...
- 200102-MAYOR...
- 200119-MAYOR...

Step 2: Associate Fund value to the CIP project

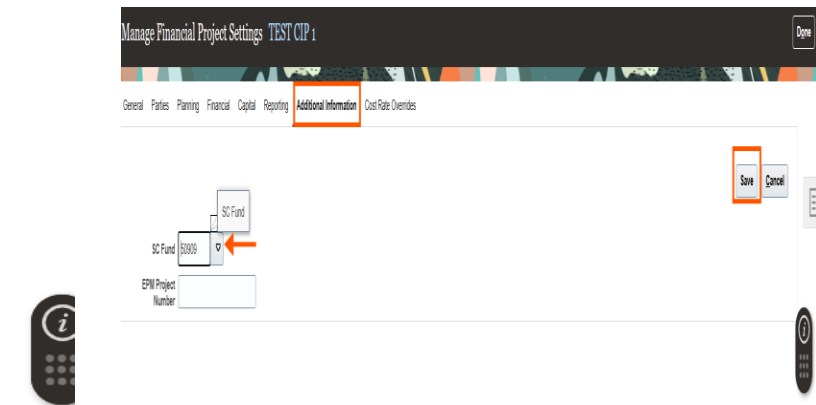
Attach the correct fund or funding source to the capital project .

Navigation:

- From Project Screen, Go to Task panel
- Click Initiate> Manage Financial Project settings
- Go to additional Info Tab
- Enter/ update SC Fund(50909)
- Click save



1



2

Step 3 :Submit and approve project

Manage Financial Pro Close TEST CIP 1 Done

General Parties Planning Financial Capital Reporting Additional Information Cost Rate Overrides

Basic Information

Project Name TEST CIP 1

Project Number CIP-10089

Organization 200301-CAO-ADMINISTRATION

Start Date 11/1/25

Finish Date 11/30/25

Project Status Draft Change Status

Sponsored Project No

Enable budgetary control

Description

Show More

Project Classifications ?

Class Category	Class Code	Percent	Exceptions
CIP Project Type	Roads & Bridges Projects		

Attachments

Type	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.					

Columns Hidden 1

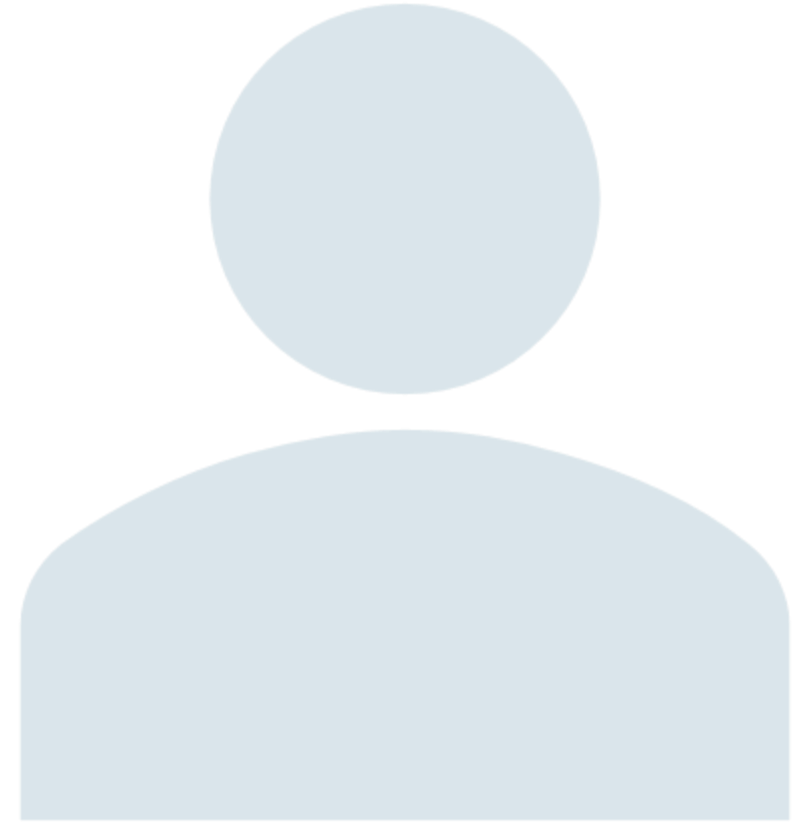


- Change Project status from draft to Submitted. The project submitted for Approval.

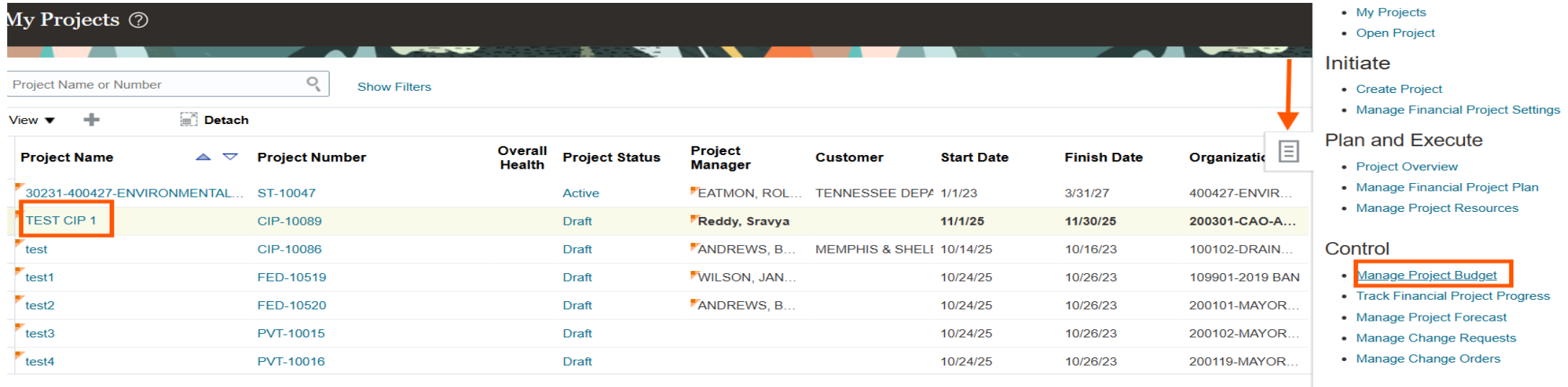
Step 4 :Approve Project with Project Approval Workflow



Project is Approved



Step 5 :Create Cost Budget - Create Budget Lines Manually



The screenshot shows a web application interface for project management. At the top, there is a header "My Projects" with a help icon. Below it is a search bar for "Project Name or Number" and a "Show Filters" button. A "View" dropdown and a "Detach" button are also present. The main area is a table with columns: Project Name, Project Number, Overall Health, Project Status, Project Manager, Customer, Start Date, Finish Date, and Organization. The row for "TEST CIP 1" is highlighted with a red box. To the right of the table is a sidebar with a menu icon, and an orange arrow points from the search bar area to this menu icon. The sidebar contains several sections: "Initiate" (My Projects, Open Project), "Plan and Execute" (Project Overview, Manage Financial Project Plan, Manage Project Resources), and "Control" (Manage Project Budget, Track Financial Project Progress, Manage Project Forecast, Manage Change Requests, Manage Change Orders). The "Manage Project Budget" option in the Control section is highlighted with a red box.

Project Name	Project Number	Overall Health	Project Status	Project Manager	Customer	Start Date	Finish Date	Organization
30231-400427-ENVIRONMENTAL...	ST-10047		Active	EATMON, ROL...	TENNESSEE DEPA	1/1/23	3/31/27	400427-ENVIR...
TEST CIP 1	CIP-10089		Draft	Reddy, Sravya		11/1/25	11/30/25	200301-CAO-A...
test	CIP-10086		Draft	ANDREWS, B...	MEMPHIS & SHEL	10/14/25	10/16/23	100102-DRAIN...
test1	FED-10519		Draft	WILSON, JAN...		10/24/25	10/26/23	109901-2019 BAN
test2	FED-10520		Draft	ANDREWS, B...		10/24/25	10/26/23	200101-MAYOR...
test3	PVT-10015		Draft			10/24/25	10/26/23	200102-MAYOR...
test4	PVT-10016		Draft			10/24/25	10/26/23	200119-MAYOR...

- My Projects
- Open Project

Initiate

- Create Project
- Manage Financial Project Settings

Plan and Execute

- Project Overview
- Manage Financial Project Plan
- Manage Project Resources

Control

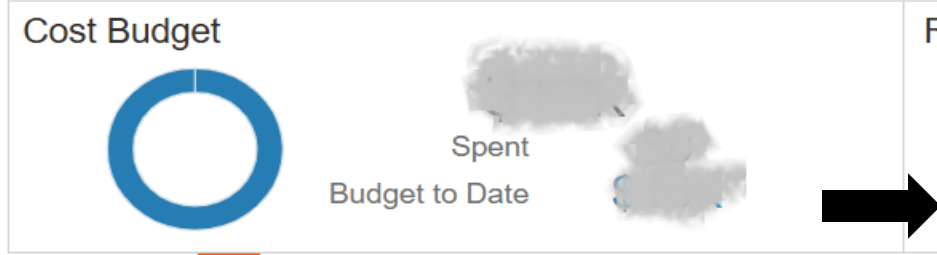
- Manage Project Budget
- Track Financial Project Progress
- Manage Project Forecast
- Manage Change Requests
- Manage Change Orders

Navigation:

1. Projects – Select the project
2. Go to Task panel
3. Click control-Manage Project Budget

Currency = USD

Overview



Actions + + + + +

Create Budget Version



* Name

Financial Plan Type Help

Planning Amounts Approved cost budget

* Budget Creation Method

Description

Notes

Attachments None

4. Click Create Budget Lines Manually [Budget Creation Details](#)

5. Enter required details - Cost Only Budget

6. Enter Version Name

7. Click Save



* Name Version 1 Display Task structure Current Planning Period 2025-12



Cost Only Budget

Planning Level: Project and top tasks

Planning Options

Attachments: None +



Cost Budget

\$0.00

Actions View



Detach

Go to Task

Layout

Budget Lines

Task Number or Resource	Task Name	Quantity	Raw Cost (USD)	Raw Cost Rate (USD)
CIP-10089	TEST CIP 1			
Financial Resources			10,000.00	
99	Conversion			

8. Select Project- Click Add Icon

9. Choose Financial Resource

10. Enter Raw Cost

11. Click save and Close

12. Budget has been sent to the approver for approval.

2. Import and Review CIP Project Cost

This Process is used to bring project costs into Oracle PPM from different sources like Supplier Invoices , Expense reports . After importing , we review the costs to make sure they are accurate and correctly linked to the CP project.

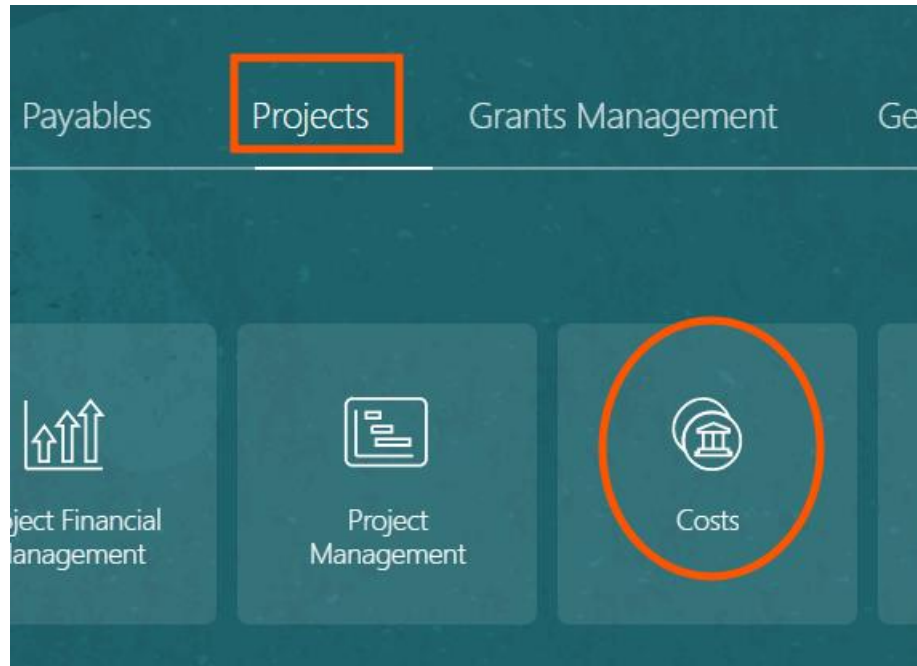


CIP Project Costing Includes Following Steps:

- Import and Process Transactions from Payables - Expense Report
- Import and Process Transactions from Payables - Supplier Invoice

Step 1 :Import and Process Transactions from Payables - Expense Report

1.Navigator- Projects – Cost

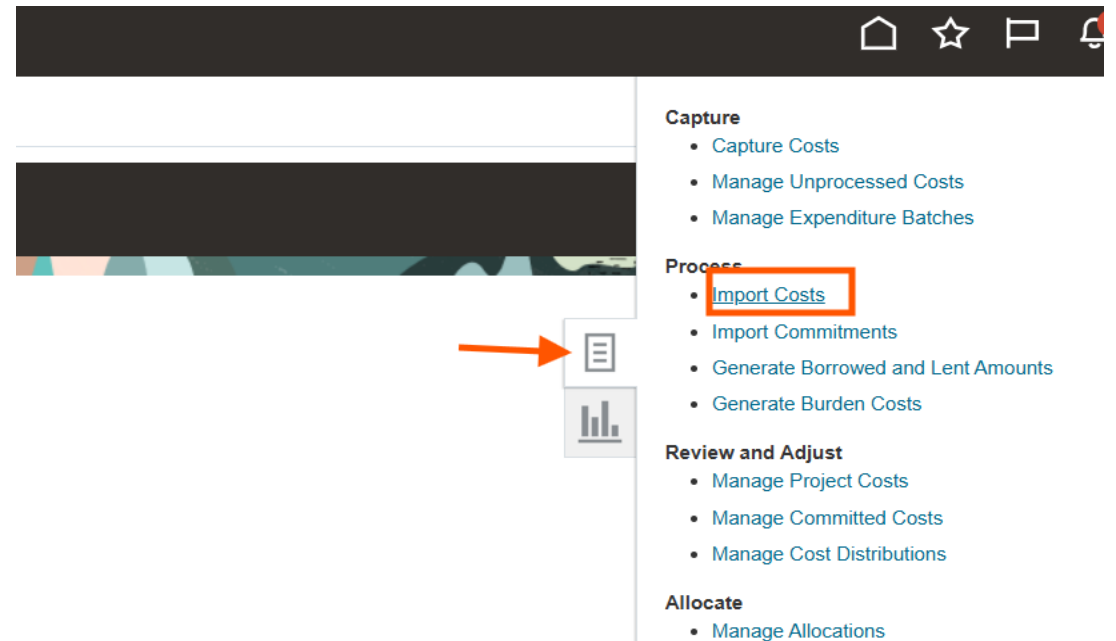


1

2.On the overview page, Click Tasks

3.Select process –Import Cost


4. Click Import Costs



2

5. In the Import Cost page, Fill all required Information

6. Click Submit.

 This process will be queued up for submission at position 1

Name Import Costs

Description Creates project costs and cost distributions for the transactions in the Project Costing open interface table using parallel processing.


Notify me when this process ends


Schedule As soon as possible


Submission Notes


Basic Options

Parameters

* Business Unit 

* Process Mode 

* Transaction Status 


* Transaction Source 

Document

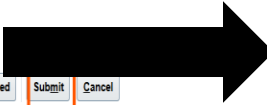
Expenditure Batch

From Project Number

To Project Number

Process Through Expenditure Item Date 

Generate Report 



Confirmation

Process 1122312 was submitted.

Overview ?

Items Requiring Attention

Business Unit

Transaction Processing Status

Incomplete Expenditure Batches (0) ?

Allocations (0)

Process Monitor

View Flat List Hierarchy

View Resubmit Status All Time Range Last 24 hours ?

Process Name	Process ID	Status	Scheduled Time	View Output	Parameters	View Log
Import Costs	1122312	Succeeded	12/5/25 12:56 PM ...		300000000425501, PREV_NOT_IMPORTED, IMPORT_AND_PROCESS, 300000000425502, 3000000004855101, Shelby County ...	

4

7. After Submit, go back to overview page

8. Scroll to the Process Monitor section


9. Click expand to see process list

10. Click Refresh Until the status shows Succeeded

11. Click View Output

12. Open PDF and check that there are no errors.

Step 2: Import and Process Transactions from Payables - Supplier Invoice

 This process will be queued up for submission at position 1

[Process Options](#) [Advanced](#) [Submit](#) [Cancel](#)

Name Import Costs

Description Creates project costs and cost distributions for the transactions in the Project Costing open interface table using parallel processing.

Schedule As soon as possible


Notify me when this process ends

Submission Notes

• **Same as Step 1 Process, Instead of Expense Report select Supplier Invoice.**

Basic Options

Parameters

* Business Unit	Shelby County Business Unit	▼
* Process Mode	Importing and processing transactions	▼
* Transaction Status	Not previously imported	▼
* Transaction Source	Oracle Fusion Payables	▼
Document	Supplier Invoice	▼
Expenditure Batch		▼
From Project Number		▼
To Project Number		▼
Process Through Expenditure Item Date	12/3/25	
Generate Report	Detail	▼



3.Review Accounting for CIP Project Cost

Step 1 :Create and view Accounting - Miscellaneous Cost

This Option is used to manually create costs that are not coming from payables or Expense Report

Example :

A Project Team purchased small construction Material like Screws, Bolts from local stores.

Since this is not purchased through a supplier invoice or expense report, we manually record this cost as a Miscellaneous cost in oracle.

Overview

Overview ?

Items Requiring Attention

Business Unit

Transaction Processing Status

Incomplete Expenditure Batches (0) ?

Allocations (0)

Process Monitor

View Flat List Hierarchy

View Status Time Range

Process Name	Process ID	Status	Scheduled Time	View Output	Parameters
No data to display.					

Capture

- Capture Costs
- Manage Unprocessed Costs
- Manage Expenditure Batches

Process

- Import Costs
- Import Commitments
- Generate Borrowed and Lent Amounts
- Generate Burden Costs

Review and Adjust

- Manage Project Costs
- Manage Committed Costs
- Manage Cost Distributions

Allocate

- Manage Allocations
- Manage Allocation Rules

Account and Close

- Create Accounting
- Review Journal Entries
- Post Journal Entries to General Ledger
- Account Analysis Report
- Journal Entries Report
- Project Accounting Period Close Exceptions Report
- Accounting Period Close Exceptions Report
- Subledger Period Close Exceptions Report
- Sweep Transaction Accounting Events
- Manage Project Accounting Periods
- Manage Accounting Periods

Administer

- Manage Rate Schedules
- Manage Burden Schedules

1

1. Go to Projects- costs
2. Click on costs link (overview page Opens)
3. Click the Task Panel
4. Go to account and close- create Accounting

This process will be queued up for submission at position 1

Process Options Advanced **Submit** Cancel

Name Create Accounting for Projects

Description Creates subledger journal entries for eligible transactions in Oracle Fusion Project Portfolio Management.

Notify me when this process ends

Schedule As soon as possible

Submission Notes

Basic Options

Parameters

→ Ledger SC Primary Ledger

→ Business Unit Shelby County Business Unit

→ Process Category Miscellaneous Cost

→ * End Date 12/3/25

→ * Process Mode Final

* Process Errors Only No

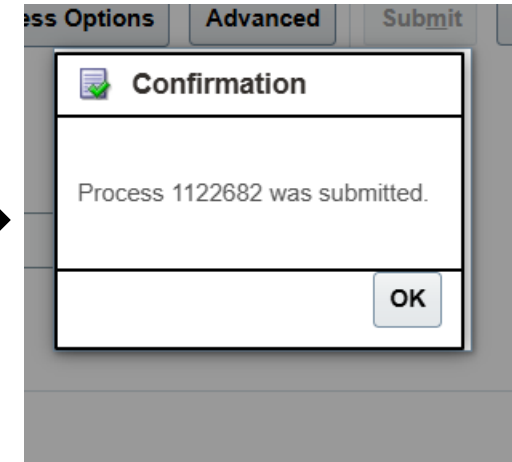
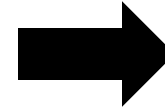
* Report Style Detail

* Transfer to General Ledger Yes

* Post in General Ledger Yes

General Ledger Batch Name

* Include User Transaction Identifiers No



5. Enter Required Fields (ledger, BU, Process Category

6. Click Submit

Overview ?

Items Requiring Attention

Business Unit

Transaction Processing Status

Incomplete Expenditure Batches (0) ?

Allocations (0)

Process Monitor

View Flat List Hierarchy

View Status Time Range

Process Name	Process ID	Status	Scheduled Time	View Output	Part
Create Accounting Execution Report	1122685	Succeeded	12/5/25 3:42 PM ...		N, D

Create Accounting Execution Report, 1122685, Output

Output & Delivery

XML Data

Status

Output Name	Template	Format	Local
Default Document	Create Accounting Report	PDF	Englis

View Log

3

7. From Overview Page, Scroll to the Process Monitor Section

8. Click Refresh until the process status Succeeded

9. Select Create Accounting Execution Report

10. Click View Report



Question & Answer Time

Next Steps

-
- After leaving this session, what will you do:
 - First
 - Next
 - Next
 - Next...



What's Next?

Homework

- Review Notes & OGL Guides
- Huddle/Debrief with your Team
- Practice Logging In
- Support:
OneConnect.help@shelbycountyttn.gov
- Link To One Connect :
<https://oneconnect.shelbycountyttn.gov>

**Thank You
for your
active participation
in today's session!**