Tririga Department Hierarchy Overhaul

USING ORACLE FINANCIAL CLOUD FINANCIAL UNIT HIERARCHY FOR SPACE
Current State

Three different department hierarchies on campus

1. UCPath
   - Imported from PPS
   - Tied to union agreements
   - Has evolved organically and unevenly over time

2. Oracle Financial Cloud
   - Revamped as part of OFC implementation
   - Tracks money

3. Tririga
   - Inherited from old FIS
   - Customized to track space
   - Tied to OP space management requirements
Challenges of multiple hierarchies

Can’t map from one system to another in reporting and integrations

- Which space manager should be responsible for this employee?
- How many dollars per square foot does this department spend?

If different systems have different definitions of departments, we can’t answer basic questions
Space is a Resource

Converting Tririga to use the OFC hierarchy

- Better matches needs for space tracking
- More consistent and logical structure
- Easier to make changes (because not tied to union agreements)
OFC Financial Unit Concepts

1. 5 Levels
2. Units Repeat
3. “Top Line” FinUs
OFC Concept 1: 5 levels

Level 1: Campus
16000AA UC San Diego

Level 2: VC Area
100000A Academic Affairs

Level 3: Major Department or Division
100800B Dean of Engineering

Level 4: Department
100807C Mechanical and Aerospace Engineering

Level 5: Subdepartment
1000199 Materials Science Program
## Concept 1: Examples

<table>
<thead>
<tr>
<th>Level 1 Campus</th>
<th>Level 2 VC Area</th>
<th>Level 3 Major Department</th>
<th>Level 4 Department</th>
<th>Level 5 Subdepartment</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC San Diego</td>
<td>100000A Academic Affairs</td>
<td>100500B Dean of Physical Sciences</td>
<td>100503C Mathematics</td>
<td>1000143 Math Diagnostic Testing Project</td>
</tr>
<tr>
<td>UC San Diego</td>
<td>200000A Marine Science</td>
<td>200100B Marine Sciences Research</td>
<td>200103C Earth Sciences</td>
<td>2000017 Institute of Geophysics and Planetary Physics</td>
</tr>
<tr>
<td>UC San Diego</td>
<td>500000A Chief Financial Officer</td>
<td>500500B Information Technology Services</td>
<td>500505C Business Technology Services</td>
<td>5000096 ITS BTS RMP Info Services</td>
</tr>
<tr>
<td>UC San Diego</td>
<td>500000A Chief Financial Officer</td>
<td>500500B Information Technology Services</td>
<td>500505C Business Technology Services</td>
<td>5000092 ITS BTS Financial Info Services</td>
</tr>
</tbody>
</table>
OFC Concept 2: Units repeat

All expenses are recorded at level 5 (the one with no letter)

If a unit does not have smaller units, it repeats again until it gets to level 5

<table>
<thead>
<tr>
<th>Level 1 Campus</th>
<th>Level 2 VC Area</th>
<th>Level 3 Major Department</th>
<th>Level 4 Department</th>
<th>Level 5 Subdepartment</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC San Diego</td>
<td>100000A Academic Affairs</td>
<td>100500B Dean of Physical Sciences</td>
<td>100504C Physics</td>
<td>1000144 Physics</td>
</tr>
<tr>
<td>UC San Diego</td>
<td>500000A Chief Financial Officer</td>
<td>500300B Campus Budget</td>
<td>500300C Campus Budget</td>
<td>5000131 Campus Budget</td>
</tr>
</tbody>
</table>
OFC Concept 3: “Top Line” FinUs

Major Departments have a need to reserve unallocated moneys and space

So they have a “top line” financial unit to reserve the resource

To separate between top line units and operational units, operational units have the word “office” at the end of the name

<table>
<thead>
<tr>
<th>Level 1</th>
<th>Level 2 VC Area</th>
<th>Level 3 Major Department</th>
<th>Level 4 Department</th>
<th>Level 5 Subdepartment</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC San Diego</td>
<td>300000A Health Science</td>
<td>300000B Health Sciences</td>
<td>300000C Health Sciences</td>
<td>3000212 Health Sciences</td>
</tr>
<tr>
<td>UC San Diego</td>
<td>300000A Health Science</td>
<td>300000B Health Sciences</td>
<td>300000C Health Sciences</td>
<td>3000137 Debt Service</td>
</tr>
<tr>
<td>UC San Diego</td>
<td>300000A Health Science</td>
<td>300000B Health Sciences</td>
<td>300001C Health Sciences Office</td>
<td>3000204 VCHS Counsel</td>
</tr>
</tbody>
</table>
Using Financial Units for Space

We’ll be using the Level 4 “C level” departments for space.

We will not be creating custom departments in Tririga – they must exist in OFC first.

All of the OFC Financial Units will automatically be loaded into Tririga.
  ◦ But they will not all be allowed to have space allocated to them.
  ◦ Some FinUs are purely financial constructs.

All OFC Level 4-mapped departments with space will need overhauled space contact roles.
Implications in Tririga

The existing department hierarchy is going away

Spaces will be allocated to OFC department-level Financial Units
  ◦ The ones that end in “C”
  ◦ This may result in more or less granular tracking depending on your business area
  ◦ It’s okay to revisit/restructure Financial Units

We can disable departments that we do not want space allocated to

All departments in Tririga will need to be mapped to OFC Financial Units for the conversion

All departments in Tririga will need completed department contact roles
1. Department contact roles
   - OFC Level 4 “C level” departments with space
   - **Space Administrator** - VC or equivalent
   - **Space Manager** - School or major/multiple department(s)
   - **Space Associate** - department/multiple sub-department(s)

2. Tririga user roles
   - **Space Editor** replaces "Space Manager"
   - **Space Information** replaces "Data Consumer"
Exercise

1. Review the existing department hierarchy for your area in Tririga
2. Look at our tentative mapping
3. Make necessary changes
4. Add department contacts
Questions and comments

1. Discussion
2. Next steps