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

Level 2: VC Area

Level 3: Major Department or Division

Level 4: Department

Level 5: Subdepartment

16000AA UC San Diego

100000A Academic Affairs

100800B Dean of Engineering

100807C Mechanical and Aerospace Engineering

1000199 Materials Science Program

Concept 1: Examples

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

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

Level 1 Campus	Level 2 VC Area	Level 3 Major Department	Level 4 Department	Level 5 Subdepartment
UC San Diego	100000A Academic Affairs	100500B Dean of Physical Sciences	100504C Physics	1000144 Physics
UC San Diego	500000A Chief Financial Officer	500300B Campus Budget	500300C Campus Budget	5000131 Campus Budget

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

Level 1 Campus	Level 2 VC Area	Level 3 Major Department	Level 4 Department	Level 5 Subdepartment
UC San Diego	300000A Health Science	300000B Health Sciences	300000C Health Sciences	3000212 Health Sciences
UC San Diego	300000A Health Science	300000B Health Sciences	300000C Health Sciences	3000137 Debt Service
UC San Diego	300000A Health Science	300000B Health Sciences	300001C Health Sciences Office	3000204 VCHS Counsel

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

Revised 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