Thank You - We Hear You

• 9 Academic Affairs Sessions with 100+ attendees
  • JSOE  • DoBS  • GPS
  • DSS  • DAH  • Quartet
  • DPS  • Rady  • EVC Units

• 300+ Challenges (Anonymized & Themed)
  • Change saturation
  • Reporting challenges
  • Training needs
  • Communication challenges
  • Lack of department engagement in decision-making
  • Overall low morale

• 100+ Potential Solutions
<table>
<thead>
<tr>
<th>SME</th>
<th>Title</th>
<th>ESR System Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heather Sears</td>
<td>Director – Business Intelligence and Reporting Business &amp; Financial Services</td>
<td>Oracle</td>
</tr>
<tr>
<td>Cheryl Kaino</td>
<td>FIS Service Owner Information Technology Services</td>
<td>Activity Hubs</td>
</tr>
<tr>
<td>Brett Pollak</td>
<td>Sr Director, Workplace Tech Services Information Technology Services</td>
<td>Activity Hubs</td>
</tr>
<tr>
<td>Judy White</td>
<td>Director/Bus Intel Analytics Information Technology Services</td>
<td>Activity Hubs</td>
</tr>
<tr>
<td>Arlynn Renslow</td>
<td>Director – Internal Controls &amp; Accounting Business &amp; Financial Services</td>
<td>Oracle</td>
</tr>
</tbody>
</table>
Expectations

1. Stay on topic
2. Respect each other's unique experiences
3. Focus on moving forward
4. Specific examples or experiences are most helpful to pinpoint solutions
5. Raise your hand if you have a question or comment. Individuals will be recognized in order
Moving Forward: Discussion
Oracle BI & Financial Reporting Team

Heather Sears (Director) hired 11/15/2021 to lead the team

Framework for report development is changing to support the needs of the campus

- Comprehensive view of financial reporting, not only Oracle BI

Dashboards, training, and report delivery will be transitioned to persona-based categorization.
Theme 1: Adjust existing reports and develop new reports to meet the needs of the community

Your feedback:

• Reduce time to generate reports
• Simplify/consolidate reports
  • Multiple reports must be run to find all information about an award/project
  • Ineffective organization of reports
• Improve report functionality
  • Expanded search parameters, drill-throughs
• Need for payroll projections
• Need for award data by budget period
• Notes about projects/awards
## Oracle BI Tools vs Activity Hub Tools

<table>
<thead>
<tr>
<th>Pros</th>
<th>Oracle BI</th>
<th>Activity Hub</th>
</tr>
</thead>
<tbody>
<tr>
<td>• All data elements already in system</td>
<td>• All data elements already in system</td>
<td>• Data is stored locally (better performance)</td>
</tr>
<tr>
<td>• Data is real time</td>
<td>• Data is real time</td>
<td>• Data from multiple systems easily joined</td>
</tr>
<tr>
<td>• Data is stored locally (better performance)</td>
<td>• Data is stored locally (better performance)</td>
<td>• Security can be defined separately from user interface (better performance)</td>
</tr>
<tr>
<td>• Data from multiple systems easily joined</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Security can be defined separately from user interface (better performance)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cons</td>
<td>• Data must be accessed from the cloud (slower)</td>
<td>• Data is accurate as of yesterday</td>
</tr>
<tr>
<td>• OFC optimized for transaction processing, not reporting</td>
<td>• OFC optimized for transaction processing, not reporting</td>
<td>• Some ability for user customization of reports (i.e. filters, sorting, subtotals), but customizations cannot be saved</td>
</tr>
<tr>
<td>• Limited to Oracle data</td>
<td>• Limited to Oracle data</td>
<td></td>
</tr>
<tr>
<td>• Subject to Oracle’s timeout settings</td>
<td>• Subject to Oracle’s timeout settings</td>
<td></td>
</tr>
</tbody>
</table>
Fund manager dashboards in development

- Goal: Task-focused dashboards with everything a fund manager needs to perform a given task on a single dashboard
- Current state: Gathering requirements with SMEs
- Once developed, user testing/feedback before implementation
- Continuous improvement to refine based on needs

<table>
<thead>
<tr>
<th>Dashboard</th>
<th>Purpose</th>
<th>Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI Reporting</td>
<td>Fund manager analysis of PI portfolio; report for fund manager to deliver to faculty; may expand to cover all project reporting</td>
<td>Cognos</td>
</tr>
<tr>
<td>Project Closeout</td>
<td>Facilitate clearing deficits, identify areas for clean-up prior to close</td>
<td>Oracle BI</td>
</tr>
<tr>
<td>Award Closeout</td>
<td>Identify awards ended or close to ending, facilitate all activities needed to bring award to close</td>
<td>ND; collaboration with OCGA</td>
</tr>
<tr>
<td>Transaction Details</td>
<td>Search PPM and GL transactions by any parameters; drill to detail from any report with summarized costs; enable identification of high-risk transactions for ledger review</td>
<td>Cognos</td>
</tr>
<tr>
<td>Project Trending and Analytics</td>
<td>Graphs and charts to show project activity and trending over time</td>
<td>ND</td>
</tr>
</tbody>
</table>
Next Steps

• Continued focus on role-based reporting
  • Fiscal Manager and Fiscal Leader Dashboards up next.

• Moving some key reports to Cognos
  • Faculty and Researcher Dashboard: rebuilding and enhancing to include payroll projections.

• Q&A (10 minutes)
Welcome to the Business Analytics Hub

The Business Analytics Hub (BAH) houses a centralized list of analytics and reports that use data from one or more Activity Hubs or created from sources such as Oracle Financials Cloud and UCPath, among others. On BAH, find analytics and reports listed by area, request access to view the data, suggest new or enhanced analytics reports and submit questions. Recommended browsers for BAH and posted reporting solutions are Chrome and Firefox.

Get Started
Select from one of the sections above: Budget & Finance, HR/Payroll, Research, Student, Help.
HR/Payroll

Filter by Category

- All Reports
- Academic Personnel Reports
- Community Reports
- Human Resources EDI Reports (Restricted)
- Human Resources Reports
- Payroll Accounting and Reconciliation
- Payroll and Financial Reports (Restricted)
- Payroll and Financial Reports

Filter by Keyword

- Academic Position Management Audit
  - This report shows position status to audit position data and to review employee records.
  - View Details
  - Launch

- Additional Pay Report
  - Departments should use this report to monitor end dates for Recurring Additional Pay and decide if it should end as scheduled, be ended early (requires UCPC assistance), or be extended (following appropriate...)
  - View Details
  - Launch

- Benefit Costs Report
  - Report provides benefit costs associated with employees’ earnings charged to the department.
  - View Details
  - Launch
Budget & Financial Management Reports Panorama

This Panorama delivers a full suite of budget and financial management reports and queries intended to support campus business officers. They are designed to support internal financial management of the university finances, and as such use Managerial Reporting hierarchies.

Contents

The Budget and Financial Management Reporting dashboard includes the following pages:

- Reports List
- Budget vs. Actual
- Net Operating Results and Fund Balance
- Expanded Budget Summary
- Financial Deficit Report - Operating Funds
- Financial Deficit Report - Sponsored Projects
- Fund Summary
- Total Budget Summary
- FY21 Core Recurring Budget
- Managerial Reporting Account Hierarchy
- Managerial Reporting Fund Hierarchy

Business Scenarios

- Delivers a full suite of budget and financial management reports and queries intended to support campus business officers.
- Designed to support internal financial management of the university finances, including use of Managerial Reporting hierarchies.

Resources
Theme 2: Report Accuracy and Training

• Context of the data being displayed is important
  • List of GL transactions will show different totals than a list of PPM transactions
  • Variance based reporting will not add up to a report showing all transactions
  • Transactions may have posted to one or more suspense accounts (Financial Unit Default Project)
• Online, self-paced training and Zoom based training is planned. Open to feedback on additional delivery channels
• Please report any questions or issue through Services and Support
Theme 3: Increase Report Access

- Operational Data Committee (ODC) is developing recommendations to streamline access both for report viewers and report creators (role based access)
  - Recommendations targeted for January, 2022 with implementation to follow
  - Review and recommendations are for all data domains (not just Finance)
  - Includes both Oracle and reports built in Activity Hub
  - Some dependencies on Identity and Access Management
Resources and Questions

• Chancellor's Financial Systems Advisory Committee [Main Issues List](mailto:Main Issues List)
  • Contact Allorah Pradenas ([apradenas@ucsd.edu](mailto:apradenas@ucsd.edu)) with questions

• Services & Support >> Budget and Finance Request Catalog >> Get Help (BFP) >> [Budget & Finance Enhancement Request](mailto:Budget & Finance Enhancement Request)
• Find out more about the [BI & Financial Reporting Team](mailto:BI & Financial Reporting Team)
• View the reports linked from the [Business Analytics Hub (BAH)](mailto:Business Analytics Hub (BAH))
Thank You