SkyVU Frequently Asked Questions

GENERAL

How do I log into the system?
Users can access Oracle Cloud by navigating to the SkyVU homepage and selecting the Oracle Cloud icon. Users will then enter their VUnetID and ePassword.

What is my username and password for Oracle Cloud?
Users will use their VUnetID and ePassword to access Oracle Cloud.

What is the chart of accounts? How do I use it?
A chart of accounts is a structure used to record the financial impact of transactions. At Vanderbilt, we use this information to communicate how our transactions support our educational and research mission. You can learn more about our chart of accounts and how to use on the SkyVU website.

I'm going on vacation. Can someone approve my transactions on my behalf?
Yes. Financial unit managers will be able to delegate their approvals in workflow from the BPM worklist in Oracle Cloud for procurement and financials (including expense reports) to another financial unit manager or upwards to their approval group. Other approval roles that are part of an approver group need not delegate their approvals to another person, as the other members of the approval group may continue to claim and approve/reject transactions in their absence.

I forgot to approve a transaction and I can no longer access it. How can I tell where it is?
Approvers will receive notifications by email and within Oracle Cloud itself. Prior notifications will be available in an approver's bell notifications and within Oracle Cloud's BPM worklist. By searching the transaction within Oracle Cloud's BPM worklist, the approver can review its current workflow assignment status, and if still currently assigned to the approver, take action (approve or reject). If the transaction has escalated from the approver to the approver's HR line manager due to inactivity exceeding five (5) days, the transaction's history will show to whom it is currently assigned.

What is the recommended internet browser for the best user experience in Oracle Cloud?
For the best user experience, it is recommended that you use Mozilla Firefox.

Do I need to enable pop-ups in Oracle Cloud?
Yes. Please ensure your pop-up settings are enabled/allowed for all OracleCloud.com
subdomains (.prc, .hcm, .erp, etc.).

Why does my co-worker have options in the navigator that I don't?
The options that populate the navigator and the homepage springboard are controlled
by a user's security roles. If your co-worker holds the role of financial unit manager or
HCM specialist, his/her navigator and homepage will feature related options that are not
available to a general user.

Who is my FUM? What do I utilize them for?
Your financial unit manager ("FUM") is a required approver, and the first approver, for
all procurement and expense report transactions for that financial unit and any related
projects. As the financially responsible person for a department, the FUM is also a
required approver when posting Taleo requisitions for open positions in that department.
To find your FUM, click here.

Who is my HCM specialist? What do I utilize them for?
Your business unit's HCM specialist(s) can initiate a wide variety of HR-related
transactions, including hiring, ending assignments, adjusting compensation, editing time
cards, and adjusting an employee's assignment labor costing. To find your HCM
specialist, click here.

HUMAN CAPITAL MANAGEMENT (HCM)

Where will I update my personal information?
Beginning Jan. 3, users will log into Oracle Cloud to make updates to their personal
information (formerly made in C2HR). From the navigator, users can select "Personal
Information" found beneath the heading "About Me." The first panel on the screen will
be "My Details," where a user may click "Edit" and begin submitting changes to his/her
information.

NOTE: Any change made to a user's personal information in C2HR after Nov. 30 is
ineffective. Changes that must be made to a user's personal information between Dec.
1 and Jan. 3 should be held, when possible, and entered on or after Jan 3. If a user is
unsure whether the changes to information can be held until Jan. 3, please contact HR
Information Systems.

Where do I view my paycheck?

Beginning Jan. 3, users will log into Oracle Cloud to view payslips for pay periods ending on or after Jan. 1. From the Navigator, users can select "Personal Information" found beneath the heading "About Me." "My Details" will load, and users can select the third tab on the left side (vertical tabs). This tab is labeled "Payroll" and features an icon with a person's silhouette in a circle.

By clicking on this tab, the system will display a table of payslips with details for Period Begin/End/Payment Dates, Pay Amount, and a check icon. Clicking on the check icon will open the respective payslip (PDF format).

NOTE: Viewing paychecks issued prior to Jan. 1 will remain in C2HR where users can continue to log in using their VUnetID and ePassword. This access to C2HR should be used only for viewing historical information, as no changes submitted here have any effect on our new systems.

Where do I view my W2?
The 2017 W2 will be viewable within C2HR in late January 2018. The 2018 W2 will be viewable in Oracle Cloud under Personal Information.

How do I change my address?
Beginning Jan. 3, users will log into Oracle Cloud to make updates to their personal information (formerly made in C2HR). From the navigator, users can select "Personal Information" found beneath the heading "About Me." The first panel on the screen will be "My Details," where a user may click "Edit" and begin submitting changes to his/her information.

NOTE: Any change made to a user's personal information in C2HR after Nov. 30 is ineffective. Changes that must be made to a user's personal information between Dec. 1 and Jan. 3 should be held, when possible, and entered on or after Jan. 3. If a user is unsure whether the changes to information can be held until Jan. 3, please contact HR.

How do I change my direct deposit?
Vanderbilt faculty, staff, and students must visit Vanderbilt University Human Resources located on the 10th floor of the Baker Building (110 21st Ave. S.).

How do I update my AlertVU emergency contact information?
Beginning Jan. 3, users will log into Oracle Cloud to make updates to their personal information (formerly made in C2HR). From the navigator, users can select "Personal Information" found beneath the heading "About Me." The first panel on the screen will

be "My Details," where a user may click "Edit" and begin submitting changes to his/her information.

On Jan. 3, the AlertVU-specific fields will show as blank; however, your contact information originally supplied in C2HR (on or before Nov. 30) will still be used in an emergency to contact you unless or until you make changes in Oracle Cloud.

NOTE: Any change made to a user's personal information in C2HR after Nov. 30 is ineffective. Changes that must be made to a user's personal information between Dec. 1 and Jan. 3 should be held, where possible, and entered on or after Jan. 3. To request a manual change to your AlertVU contact information between Nov. 30 and Jan. 3, contact Public Safety.

Where do I go to view my employment history?
Beginning Jan. 3, users will log into Oracle Cloud to view their employment history. From the navigator, users can select "Personal Information" found beneath the heading "About Me." The fifth tab in the vertical list on the left side of the panel with an icon of a person record is "Employment Details," which a user can click to review a timeline with pertinent employment changes (e.g., assignment or manager changes), time with Vanderbilt University, and other details.

How do I access my old information that used to be in C2HR?
Generally, your employment history will be available in Oracle Cloud. Nevertheless, not all historic information will be available in Oracle Cloud. Beginning Dec. 1, 2017, changes should not be made in C2HR. Users will still have access to C2HR and will be able to review past payslips and employment history.

NOTE: Any change made to a user's personal information in C2HR after Nov. 30 is ineffective. Changes that must be made to a user's personal information between Dec. 1 and Jan. 3 should be held, where possible, and entered on or after Jan. 3. If a user is unsure whether the changes to information can be held until Jan. 3, please contact HR.

If I need to change my direct deposit info or my marital status, do I need to visit HR?
Employees who seek to make a change to their direct deposit information, W-4, or marital status or to correct their date of birth and/or SSN must visit HR directly to initiate these changes.

Will new hire information need to be entered into Taleo and into Core HR?
A new staff (or VTS) hire need only enter his/her details into Taleo. These details, along with position details, are automatically imported into Oracle Cloud's Core HR module as a pending worker. An HCM specialist will review the submitted details to ensure

completeness, add compensation details, and submit the transaction for approval. Duplicative data entry is not required.

How do I view my direct reports in Oracle Cloud?
From the navigator in Oracle Cloud, line managers will be able to review their direct reports under the "My Team" heading, using various links.

How do I deal with job changes (like a promotion) with Oracle Cloud?
HCM specialists can affect changes to a user's assignment details, including reclassifications and new/additional assignments. For additional information, contact your HCM specialist. You can find an HCM specialist for your business unit on [SkyVU's Local Resources webpage](#).

How will missed pay requests be made and processed?
Depending on the type of missed pay, it will either be keyed into Time and Labor (by the employee directly) for the previous pay periods or the HCM specialist will make corrections to the pay type within Oracle Cloud. Generally, the missed pay will be processed on the next scheduled pay period.

Will exempt time-off requests follow workflow for approval?
Yes. Time-off requests entered by exempt employees (through Time: Manage Absences) will route to the requester's line manager for approval.

Can I submit a time-off request for a future period?
Yes. Exempt employees can submit future-dated PTO requests through Time: Manage Absences. The Oracle Cloud system will forecast future accruals and other pending and approved time-off requests to provide an accurate balance for employees to plan their PTO.

Will a time clock or paper time cards still exist?
If you are currently using a time clock and are paid weekly, there will be a new time-recording device to replace the time clock. In limited circumstances, departments can continue to use paper time cards, but each must be manually keyed into Oracle Cloud by an HCM specialist to be picked up and paid by Payroll.

Biweekly payroll employees will enter their time into Oracle Cloud directly, regardless of whether they previously used a Kronos clock or eTimesheet.

I'm a non-exempt employee. How do I enter my time in Oracle Cloud?
From Oracle Cloud's navigator, select "Time" under "About Me." Users will enter work and PTO hours, along with any other eligible time types as appropriate. At the end of the pay period, users must review and submit the time card to their line manager for approval. Training materials are available online in the [Learning Exchange](#).

If I'm a non-exempt employee, what is the payroll calendar and when is the first biweekly time submission?
If you are paid on the weekly payroll, your first time card submission will need to take place by noon on Jan. 2, reflecting the hours you worked beginning Dec. 25.

If you are paid on the biweekly payroll, you have the same time submission date, covering the time period beginning on Dec. 17. However, we encourage you to submit your time on Dec. 21 before leaving for Winter Break.

If I am a weekly union employee, etc., what is my card swipe/tap process to clock into my job?
Located next to the Kronos clocks are the new SkyClock kiosks that weekly payroll union employees will use after Dec. 24. These employees will be able to use their Vanderbilt ID to record their timestamp for clock-in and clock-out at the beginning and end of their shifts.

Training will be scheduled for union employees to learn how to use the new time device.

As an exempt employee, please explain how I don't have to enter my time off at the end of the month, but I instead enter it in real time?
Oracle Cloud's time-off request system differs from our current month-end time-off attestation system by allowing users to request in advance planned time off (e.g., vacation) and to enter unplanned time off (e.g., unexpected illness) retrospectively. When submitting time-off requests, employees will be able to see future accruals and other previously entered future-dated time off to forecast balances and to assist in planning their PTO. Upon submitting a time-off request, the system sends a notification to the employee's HR line manager for approval.

If you are an exempt employee, your PTO will no longer appear on your paycheck. You will request PTO requests using Oracle Cloud, and your manager will review and approve your requests. Your PTO accrual will appear on the first business day of each month.

Who approves time cards and PTO?
In Oracle Cloud, an employee's line manager (direct supervisor) will receive workflow notifications to approve time cards (non-exempt) and PTO requests (exempt). These notifications will arrive by email and will show in the line manager's Oracle Cloud bell notifications and the BPM worklist.

Where will I enter my benefit elections and life events?
Vanderbilt will continue to use Benefits Express for our benefits enrollments. Additional information will continue to be found on [Vanderbilt Human Resources' Benefits webpage](#).

Will my retirement contributions still be updated and managed through Fidelity?
Yes. Vanderbilt faculty and staff will continue to manage their enrollment in our 403(b) retirement plan through Fidelity.

How do I manage my leave in Oracle Cloud?
Whether an employee is exempt or non-exempt, users should select "Time" under "About Me" from the navigator. For non-exempt employees, users will populate their time cards with the appropriate time types, including leaves (PTO, FMLA, etc.). Exempt employees will select "Manage Absences" from the right-hand Tasks menu under the same Time screen. Here, entries are made through a request process. In both instances, the users' submissions will route to their line managers for approval.

What is the exempt employee PTO request process in Oracle Cloud?
As Vanderbilt moves to Oracle Cloud, our PTO request process will drastically change from the month-end PTO function found in Exempt Time Off. In Oracle Cloud, exempt employees will log their PTO use and future requests in real time. Both prospective and retroactive PTO requests are initiated from the Manage Absences menu, found in the Tasks menu within the About Me: Time module. These requests immediately route to the employee's line manager for approval, and the employee's balances are updated, allowing for forecasting future PTO availability within the system.

How do I view my PTO balances?
From the navigator in Oracle Cloud, users can select "Time" under "About Me." From the right-hand Tasks menu, the second icon represents Absence Details, which shows a user's current PTO balances. Users who need assistance can also consult their HCM specialists to understand their current balance, the accrual process, and the process to request PTO and forecast for future leaves.

If I'm a non-exempt employee, how do I maintain my PTO requests?
You will continue to use the same process that has been established within your department or by your manager. The line manager will review any PTO time that is submitted on the time card against these requests to ensure that they had previously approved the PTO prior to it being processed by Payroll.

I see "imputed income" on my payslip. What is this?
Imputed income includes all of the benefits that Vanderbilt pays on the employee's behalf, which is taxed to the employee directly. An example of imputed income includes employer-paid life insurance.

I heard that Taleo has been re-implemented. What are the new features, such as onboarding and collaborators?
Enhancements include:
- Onboarding for candidates
- The collaborator feature to add individuals to the requisition
- A streamlined requisition process for line managers/HCM specialists
- A shortened/streamlined application process for candidates
- An improved candidate workflow for the Talent Acquisition team
- The elimination of paper e-PAFs for staff hires

How do I work with my HCM specialist when I'm recruiting for a new position?
HCM specialists will create new hire requisitions in Taleo, see screened candidates, will confirm offer details and schedule orientation for new hires. Line managers will have access to their requisitions in Taleo, can view their screened candidates and will work closely with the recruiter during the hiring process. The line manager and HCM specialist should collaborate to determine the timing of the tasks to be completed to ensure they are completed in a timely manner and to avoid duplication of work. Ultimately, each area is unique and must determine what works best for them.

How will faculty (Interfolio) and student (Student Employment) hiring work? Will my HCM specialist enter the information into Core HR?
Because faculty and student hires are not part of our Taleo job posting and onboarding process, these new hires will be entered directly by the work unit's HCM specialist in Oracle Cloud Core HR.

FINANCE

Will someone be able to complete my expense report on my behalf?
Yes, you can set a delegate through the tasks menu within the Expenses module. From the Expenses module, users can select the task icon from the right-hand side of the screen and choose "Manage Delegates." Then search for the person's name in the system to delegate your expense item and report creation. For additional guidance, search "expense delegate" in Guided Learning.

Can I charge an expense report to a department outside of my home department?
Yes. Users can populate any valid COA or POET string for each item on the user's expense report. For convenience, each expense item will pre-populate the funding source with a user's default work unit information and this field is user-editable. Workflow for each expense item in an expense report is dependent on the financial unit specified in the COA/POET string.

If my expense report violates policy, how will I know?
Just as today, there are audit rules in place that prevent the user from submitting or recording a policy violation. The system will notify the user with messages requesting a correction in order to move forward. There are also audit rules that trigger and notify the back office, but will not prevent the user from submitting a report. These audit rules are typically reported to leadership for further review. It is the responsibility of each user to know the current travel and expense policy to avoid any violations. The current travel and expense policy is available for review every time a user submits an expense report.

How will my One Card charges go into Oracle Cloud?
One Card transactions will import into Oracle Cloud just as they do today. The transactions will no longer exhibit an orange icon, but will be identified with the last four digits of your One Card and the word (card) under the total. One Card transactions will continue to import into Oracle Cloud with many of the payment details already completed, meaning minimal updates will be required by the user.

If I submit an incorrect expense report charge, how and when can I fix my mistake?
If a user notices that he/she submitted an expense report containing errors, the user has the ability to withdraw the expense report prior to payment processing.

When a user notices that changes are required after payment processing has occurred, such as incorrect POET or COA details, changes are not made by initiating journal entries to the general ledger as they may be done today. In Oracle Cloud, changes to data coming from a subledger, like Expenses and Accounts Payable, must be corrected in those sources, rather than through journal entries to the general ledger. When

changes are made in the subledger, those changes will be automatically reflected in updated accounting in all reports (and in the general ledger itself).

Because such corrections require manual intervention from our Procurement and Payment Services teams, it is imperative to ensure that correct data is entered into the system and that the financial unit manager reviews each transaction carefully. A policy will be communicated related to the limited and appropriate uses of corrections to subledger entries. Again, it is imperative that expenses are submitted correctly prior to processing.

Can I split an expense item between multiple grants or financial units?
Yes. Users can populate any valid COA or POET string for each item on the user's expense report. For convenience, each expense item will pre-populate the funding source with a user's default work unit information and this field is user-editable. To split charges to multiple COAs and/or POET strings, users must select "itemize" and identify the portion of each expense item and appropriate funding. Workflow approvals will route to the appropriate financial unit manager for each provided COA/POET string.

If I already have direct deposit setup for my paychecks, do I need to re-enter this information in Oracle Cloud or will it already be stored?
Faculty, staff, and students who have provided direct deposit information for payroll purposes (as required) will automatically receive expense reimbursements into the same account via direct deposit.

Can I mark part of an expense as personal?
Yes. Users can identify a portion of or an entire expense item as personal when creating their expense report by selecting "Itemize" and populating the appropriate fields. When itemizing, users must account for 100 percent of the expense item in the itemization break-out.

How can I work around errors submitting expense reports?
We have identified an issue that intermittently prevents employees from submitting expense reports. Oracle is aware of this issue and is working on implementing a permanent fix. In meantime, please have the user follow the steps below:
1. Log into Oracle and open the impacted expense report.
2. Select the "X" at the far right-hand side of an expense line/transaction. This will send the transaction back to the expenses area. Attachments, notes and accounting information will remain intact.
3. Complete step 2 for all transactions on the report.
4. Once the report is empty, delete the report.
5. Return to the expenses area, select the appropriate transactions, and click "Add to Report."

6. Once the appropriate transactions are back in an expense report, complete the necessary fields and click "Submit."

How will I use Concur in the future?
Concur will be available for travel bookings. Faculty and staff are expected to book all travel through Concur Travel to realize the benefits of our World Travel and International SOS systems.

I used to submit journals regularly. Who does this now?
Journal entries are permissible in Oracle Cloud, but the appropriate uses are limited. To safeguard the integrity of Vanderbilt's financial data, access to create and submit journal entries resides with members of the business unit/entity approval group.

Will I get to see journals before they hit my financial unit?
Journal entry practice differs greatly in Oracle Cloud compared to the business processes Vanderbilt used to support our legacy systems. Journal entries are no longer the appropriate method to make corrections or perform inter-company transactions. Although journal entries are permissible in Oracle Cloud, appropriate uses are generally limited to recording accruals and deferrals.

To safeguard the integrity of Vanderbilt's financial data, access to create and submit journal entries resides with members of the business unit/entity approval group and each journal entry must be approved by Central Finance. Financial unit managers will be able to see journal entries that post to their financial units through reporting, but they do not have specific roles in the system to create or approve journal entries.

What should I do with the money my department earns from point-of-sale transactions?
Any money earned from point-of-sale transactions must be both deposited at the bank and recorded on Vanderbilt's books. If the funds received are cash or check, a deposit slip must be filled out and the money must be deposited at the cashier's office. If you do not have a deposit slip or deposit bag, contact your business officer to obtain them.

To record the transaction on Vanderbilt's books, fill out the Cash Management External Transactions spreadsheet and send it to Treasury at treasuryoracle@vanderbilt.edu for upload into Oracle. Treasury will send confirmation back to the department once the spreadsheet has been uploaded.

If the funds received are from credit card sales, no deposit is needed, but the transactions must still be recorded on Vanderbilt's books by filling out the Cash Management External Transactions spreadsheet as noted above.

How do I request a wire transfer?
To request a wire transfer, contact Treasury at treasury@vanderbilt.edu. In order to initiate the wire transfer, proper approval, such as a memo, from the appropriate vice chancellor and complete instructions on where the wire is to be sent are needed.

The department requesting the wire is then responsible for recording that transaction appropriately by filling out and submitting the Cash Management External Transaction spreadsheet (see next question).

How do I record an outgoing wire transfer?
Any incoming or outgoing cash is recorded on Vanderbilt's books by using the Cash Management External Transactions spreadsheet. The department receiving or sending the cash is responsible for filling out the spreadsheet, obtaining the proper approval, and submitting the spreadsheet to Treasury at treasuryoracle@vanderbilt.edu for upload into Oracle. Treasury will send confirmation back to the department once the spreadsheet has been uploaded.

If I co-purchase an asset with another financial unit, what happens to the asset and the depreciation?
The ownership and depreciation will be split based off of the PO source lines if the split is greater than 25 percent. If the split is less than 25 percent, the asset ownership and depreciation will reside with the entity that funded the majority.

What do I do when I need to dispose of an asset?
When an asset owner identifies that an asset is no longer needed, the first determination should be whether the asset must be returned. If it does not need to be returned, the asset owner can determine the appropriate method of disposal-- whether through sale or disposal. In these cases, the asset owner should coordinate with the assets administrator and Plant Operations, as appropriate.

Vanderbilt's asset administrator (in Finance and can be reached at capital.assets@vanderbilt.edu) will update the asset information in Oracle Cloud. A Property Transmittal Form needs to be completed and routed to capital.assets@vanderbilt.edu. The form can be found on the Finance website.

My financial unit has received an expensive gift-in-kind that I think is capitalizable. What should I do?
Users who receive an expensive gift-in-kind should notify Finance Accounting (at capital.assets@vanderbilt.edu) so that appropriate accounting is created and the asset can be tagged and tracked.

Can I apply ("journal") a cost directly onto my faculty fund?
Yes, however, directly charging the PPM project (including faculty funds) by using the appropriate POET details during the requisition or expense reporting process is preferred. Generating transactional activity charging a POET from a sub-ledger facilitates the appropriate accounting entries in both PPM and the general ledger. If a user previously did journal entries to projects to correct incorrect entries, such changes must be made in the appropriate subledger so that accounting rules account for the financial activity throughout the system.

When non-transaction activity costs need to be applied to a PPM project, a member of your business unit/entity approval group may create a Miscellaneous Batch via spreadsheet upload. Inter-company billing will occur in the same fashion, with the provider organization performing the spreadsheet upload of the Miscellaneous Batch.

What should I do if I receive a warning message regarding the project budget when I am charging something to that project?
We are not utilizing budgetary control for faculty fund projects, so no warning should be generated. If a warning appears, it signifies that you are charging to a grant and is advisory only.

How can I see my faculty fund starting balance? Will I be able to see old transactions on my faculty fund in Oracle Cloud?
As a project team member on the PPM project, users will be able to view project demographics and summary financial details of PPM projects for any projects to which they have been added as a team member by looking up the project in Project Financial Management. Within the project financial summary, the user will see the funding entries available balance (starting balance adjusted by inception to date transactions) for their faculty fund.

Additional details, including transaction-level details of project costs, can be obtained through your financial unit manager or your business unit/entity data analyst(s). User visibility into transactions charged to a faculty fund is limited to transactions originating in Oracle Cloud. Historical activity will be available to certain data analysts in Vanderbilt's data warehouse.

NOTE: If a user does not have the Project Financial Management tile, they have not yet been added as a team member to any project. To be added to a project, users should contact their business unit/entity approval group.

How will I know that my time is being charged appropriately against my faculty fund?
HCM specialists and certain other system roles will be able to regularly run reports to determine an individual's labor distribution (cost allocation) and confirm with

departmental leaders that this conforms to the individual's efforts. If you or a coworker begins working on a new or different project or if your current project is coming to an end, you should notify one of your business unit's HCM specialists early and often so that prospective changes to labor distribution can be entered timely.

Who can charge purchases or expense reports to my faculty fund?
By referencing the appropriate POET segments, any user can specify the project as the funding source during the creation of an expense item or when entering the requisition line details.

Who can charge time to my faculty fund?
Generally, any employee (including student workers) can have a portion or all of their labor costs for an assignment charged to a project (e.g., faculty fund). To charge labor to a project, an HCM specialist can submit a prospective labor distribution change for an employee's assignment, distributing a portion of the employee's labor costs to the respective POET.

Who approves charges against my faculty fund?
Each project has an owning organization (financial unit). The "O" of POET indicates this owning organization and routes the transaction through workflow to the respective financial unit manager for approval.

Who can see the details of my faculty fund?
By default, the faculty member, financial unit manager, business unit/entity data analysts and approval group members will be project team members on each faculty fund. Additional team members may be added to each project from time to time, as appropriate. Project team members will be able to view project demographics and summary financial details of PPM projects for any projects to which they have been added as a team member by looking up the project in Project Financial Management.

If a user does not have the Project Financial Management tile, they have not yet been added as a team member to any project. To be added to a project, users should contact their business unit/entity approval group. Additional details, including transactional-level details of project costs, can be obtained through your financial unit manager or your business unit/entity data analyst(s).

Can other people see how much I'm getting paid by looking at my labor distribution on my faculty fund?
Generally, no. Charges are presented in summary form only disclosing the total amounts by account category related to labor attributed to a project. General user access to project financials is limited to this summary information. In the case of certain

system roles, such as business unit data analysts, project cost details are available and may reveal the amounts charged to a faculty fund by person, but it does not disclose the entire amount the person earns.

When the individual is also funded from general, unrestricted operational funds or another project, the project cost details will only show a portion of the total wages and will not disclose how much or whether the individual has additional funding sources.

I want to use my funding for a few different purposes. How can I segregate costs?
For faculty funds, the Task field will be used to track different fund use purposes (e.g., start-up funds, general research, etc.). Departments should consult their CBO for which Task should be used for each funding type.

Can I have a second project for my faculty fund?
No. Faculty members may have no more than one faculty fund project. Tasks are used to represent different funds within their project, providing the additional detail needed to track activity separately.

I want to move a charge from my faculty fund to my financial unit (or vice versa). What do I do?
Please refer back to the source of the transaction (payables, expenses, payroll, intercompany) and process a correction through that subledger, keeping the GL and subledger in sync. Certain compliance and/or dollar thresholds will be invoked to determine whether a change should be processed.

I want to move a charge from my faculty fund to another project (or vice versa). What do I do?
Please refer back to the source of the transaction (payables, expenses, payroll, intercompany) and process a correction through that subledger, keeping the GL and subledger in sync. Certain compliance and/or dollar thresholds will be invoked to determine whether a change should be processed.

Can I use a program or activity on my faculty fund?
Program and Activity values can be established on a given project, so that the COA cost string for every transaction posted against the project will be reflected in the general ledger with those given values.

How do I bill an internal Vanderbilt department?
Internal organizations that have been identified as intercompany provider organizations will be able to generate intercompany billing transactions via spreadsheet upload.

These transactions route to the recipient organization's financial unit manager for approval. If you believe you should be able to generate intercompany billings, please contact your local business officer.

Who creates and approves internal billing transactions?
Vanderbilt has identified certain internal organizations as internal providers for purposes of initiating internal billing transactions based on the broadly provided nature of services. Financial unit managers, as the designated financially responsible person for these areas, have been identified as the representatives who can create and submit internal billing transactions. Internal billing transactions, like requisitions and expense reports, must be approved by the financial unit manager of the charged financial unit in the internal billing transaction.

What resources are available to help me understand the internal billing processes?
Internal billing information can be obtained from your local business officer or another member of your business unit/entity approval group.

What types of things should I charge internally for? Is there anything for which I shouldn't charge internally?
Internal billing is appropriate for apportioning institutional costs, such as the Public Utilities Commission, and other consumption-based activities (e.g., catering and telecommunications). Charges between financial units are otherwise generally inappropriate.

Today I use journal entries to record costs. How will I do this in the future?
Costs will be recorded in the appropriate Oracle Cloud subledger (via direct entry or spreadsheet upload) or in an integrated third-party subledger. When costs are attributable to Accounts Payable and are not generated from the requisition or expense report process, users will be able to complete the appropriate spreadsheet to record financial impact and transmit to Accounts Payable for upload into the system.

What resources are available to help me understand the new processes without journal entries?
Your financial unit manager and business unit/entity approval group members are the best local resources for understanding the new processes.

If a journal entry is absolutely necessary, who has permission to create one?
Journal entries are permissible in Oracle Cloud, but the appropriate uses are limited. To safeguard the integrity of Vanderbilt's financial data, access to create and submit journal

entries resides with members of the business unit/entity approval group (decentrally) and with Central Finance.

Business unit/entity approval group members may rely on members of their staff to draft the appropriate journal entry details for submission in spreadsheet format; however, only the approval group members will actually be able to upload the document to Oracle Cloud and submit the transactions for workflow approval. All journal entry submissions will route to Central Finance for review and approval regardless of dollar amount.

What are subledgers? What impact do they have on our operations?
Subledgers collect transaction-level details in Oracle Cloud by relevant area (e.g., Accounts Payable) and, through configured accounting rules, populate Vanderbilt's general ledger with the appropriate summary details of subledger activity. This arrangement—where details reside in a subledger and summaries are automatically populated in the general ledger—enhances Vanderbilt's financial reporting and declutters the general ledger.

When I run reports, sometimes the data shows only $0.00. Am I missing a setting?
It depends. For users who have been granted data access to run reports, a report that produces $0.00 results incorrectly may signify that a user has not previously set his/her Report Currency default to the Ledger Currency. To set report currency to Ledger Currency, go to the Reports and Analytics Catalog View and click on your name in the top right. Select "My Account." A pop-up window for "My Account" will display a variety of settings, including "Currency." Select "Ledger Currency" from the drop down, and then click "OK."

I'm a financial unit manager now. What role do I have in period-close?
Financial unit managers should be timely reviewing and approving their transactions all month long. During month-end, it would benefit their area if they watch items pending approval and help escalate them to ensure that they are processed/posted by month-end. FUMs also may need to help prepare accruals/deferrals or other necessary general ledger entries at the discretion of their business officers.

What is the deadline for entering transactions during month-end and year-end?
We plan to have a five-day close, which includes reporting entries, so departments will need to make every effort to submit all transactions by the end of the month. We will have a close calendar for month-end and year-end (just like we do today) that will be published on the Finance website.

How do I create reports on my financial data?
A variety of reports will be available within Oracle Cloud to provide key financial information for your entity, financial unit, and/or projects. These reports reside in the Financial Reporting Center and in Reports & Analytics (both found in the navigator). As our Oracle Cloud implementation matures, we will continue to create and publish standardized reports to fulfill Vanderbilt's needs. Additional information will be published for the community at regular intervals.

How do I create reports on budget forecasting?
A variety of reports will be available within Oracle Cloud to provide key financial information for your entity, financial unit, and/or projects. These reports reside in the Financial Reporting Center and in Reports & Analytics (both found in the navigator). As our Oracle Cloud implementation matures, we will continue to create and publish standardized reports to fulfill Vanderbilt's needs. Additional information will be published for the community at regular intervals.

How do I find a financial unit? How does it compare to today's center number?
While creating a transaction, whether an expense report or a procurement requisition, users will be able to intuitively search for financial units by both number and name. Our new chart of accounts aligns the entity, net asset class, financial unit, program, and activity values with what users may find similar to our legacy systems' cost centers. Additional information about our COA and the translation from our prior cost centers is available online, and your local financial unit manager(s) and business unit approval group members can provide additional useful information about the appropriate use of program and activity segments for your department.

What are resources for identifying what account to use for a certain transaction?
The narrative chart of accounts (NCOA) details the appropriate uses for each account entry. Although the system will automatically provide a likely account based on the transaction type when shopping in the catalog or completing an expense item, users should verify that the account matches their intended use of the goods/services based on the descriptions in Vanderbilt's NCOA. The NCOA is available to review online and may be updated from time-to-time as appropriate.

What is a subledger? How do I use it?
Subledgers collect transaction-level details in Oracle Cloud by relevant area (e.g., Accounts Payable) and populate Vanderbilt's general ledger with the appropriate summary details of subledger activity through configured accounting rules. Users will do all transactional activity in Oracle Cloud's in modules like Procurement and Expenses, which will create transactions in the various subledgers (e.g., Accounts Payable or

Payroll). This is a significant change from our legacy systems and support processes, which required transactions to be processed directly in the general ledger.

What is the change in the reconciliation process/the TRV role?

The primary business function of the transaction review and verification changes drastically from our prior practice as a result of workflow changes. In Oracle Cloud, almost all transactions must be approved by the appropriate financial unit manager prior to posting. This prior approval eliminates the concerns inherent in our legacy systems, where transactions could post without approval. Certain transactions and charges will still require review and scrutiny; such transactions include labor-cost allocations and miscellaneous batches for PPM projects.

How do I search for my chart of accounts information in Oracle Cloud?

Searching for chart of accounts (COA) segment information can be done directly in the fields for the COA segments in Oracle Cloud. By clicking on the magnifying glass, users can search by number. Or they can use the advanced search features to navigate all available segment values, searching by descriptive name text and selecting the appropriate values.

What are the different types of cash? What does each mean?

- Operating Cash Flows: Cash from operations and to be included in operating budget
- Area Cash: Cash on hand, reserves
- Capital Bank Cash: Internal debt, to be paid back to the capital bank with interest
- Other Cash: Cash provided by another source in the university

Will I be responsible for inputting cash flows from philanthropy and debt?

No. Funding from external debt and philanthropy will be entered into the capital plan prior to capital planning.

Will I be able to add new projects?

Minor equipment and minor renovations can be added by users directly to ePBCS. For major and threshold projects, budget officers must submit the name of the project to financial planning and analysis in order for it to be created in the system.

What's the difference between fixed and movable equipment?

In general, fixed equipment is permanently fixed to a structure, whereas movable equipment can be moved. This differentiation comes into play when calculating depreciation as they each have a different useful life. For fixed equipment, the useful life is 18 years, and it is eight years for movable equipment.

How will we indicate we do not intend to carry out a minor renovation that appears on the facility renewal master list?
Since the project cannot be deleted, simply input zero in the "Budget amount to include in capital plan" column.

How do I write a compelling narrative?
Consider the following when writing a narrative:
- Who: Parties involved and/or impacted by the project.
- What: Project specification and what it entails.
- When: Explanation as to why this investment is needed in the planned years and duration of the project.
- Where: Physical location of the project.
- Why: Purpose of the project and how it supports the Academic Strategic Plan.
- How Much: Size/dimensions of the project and relevant unit costs.

What are the different tenants of the Academic Strategic Plan?
There are six main tenants:
- Healthcare solutions: Building distinctive and distinguished programs that develop and offer effective solutions to pressing health and healthcare problems.
- Acquisitions and growth: Acquiring new land and buildings expanding Vanderbilt's footprint.
- Infrastructure and maintenance: Routine maintenance or renewal/replacement not associated with the Academic Strategic Plan.
- Rich and diverse community: Offering students a rich and diverse intellectual community that educates the whole person and cultivates lifelong learning.
- Transforming educational models: Transforming education models through technology and research.
- Trans-institutional programs: Leading in defining and addressing important problems facing society, while pursuing new and exciting opportunities.

When I enter a percentage in "% in Budget Year" associated with a minor renovation or minor equipment, should a new row be created for that project?
The percentage indicates what portion of funding will be associated with the selected budget year. The system will automatically move the remaining balance of funds to the following year.

How can I filter minor renovations projects by fiscal year?
There is currently no way to filter out data in input forms. The data uploaded from the facility renewal master list will be imported in order by fiscal year, but any added projects will have to go at the end of that data.

How can I distinguish minor renovations from Facilities from ones that I entered?
Minor renovations entered by Facilities will follow a set naming convention and have information populated into the three read-only columns. Minor renovations entered by users will not have information in the Cost Provided by Facilities, Priority (1-3), and Suggested Budget Year columns.

What are the abbreviations that appear in some areas (e.g., OEP_Working)?
The most commonly encountered abbreviations are as follows:
- OEP: This prefix means it is consistent across the whole Oracle suit.
- OFS: This prefix means it only applies to Financial.
- PRJ: This prefix means it only applies to Projects.
- CPX: This prefix means it only applies to the Capital module.

How is depreciation calculated/distributed for major/threshold projects shared by areas? Is it square footage, funding, or something else?
Depreciation is calculated based on the costs distributed by facility and equipment type on the properties tab by entity.

Why does it take so long to confirm the data was saved when I hit "Save"?
When a user presses "Save," several calculations may run depending on the form. Because of this, sometimes there a delay between when the user clicks "Save" and when acknowledgement from the system occurs.

Can I change the formatting of negative numbers?
Yes. In the settings, it is possible to change how negative numbers are displayed. Negatives can appear in red or black and can have either a negative sign or be encased in parentheses.

What are the requirements for projects to be classified as major, threshold, or minor?
- Major projects are more than $2M and require approval from the Board of Trust.
- Threshold projects are between $1M and $2M and require approval from the chancellor.
- Minor renovations cost $100K to $1M and require approval from the applicable general officer.
- Minor equipment costs $5K to $1M per unit and requires approval from the applicable general officer.

What are the different net asset classes?
As it pertains to budget, the most common net asset classes are as follows:
- NA05 – General Unrestricted
- NA10 – Unrestricted Faculty and Student Organization Funds
- NA15 – Sponsored Contracts and Grants
- NA20 – Student Loans
- NA25 – Cores
- NA26 – Unrestricted University-directed Endowment Distributions
- NA30 – Unrestricted Endowment Book Value
- NA35 – Unrestricted Endowment Investments/Appreciation
- NA40 – Temporarily Restricted Contributions and Endowment Distributions

Are the account numbers still the same?
The chart of accounts has substantially reduced the total number of accounts, assigning a completely new list of four-digit account numbers. For more information, read the quick reference guide online.

Does depreciation roll year to year?
Depreciation occurs every year, but this can only be adjusted for the budget year. Any adjustments to depreciation will need to be made each year.

Will the sum totals automatically update?
Within each form, totals will populate when the form is saved. For a grand total of an area to be viewed, aggregation must occur since data is entered at the lowest level. In order to aggregate data, an aggregation form has been placed under the Budget Review Activity.

Can I add to programs/activities that do not have funds in them already?
Yes, programs and activities are able to be added by users, even if there are no dollars in the activity/program.

Who should I reach out to with technical issues?
Contact Financial Planning and Analysis at vufpa@vanderbilt.edu.

How can students see their student org funds?
We will utilize the finance module in Anchor Link to show student organization fund balances and transaction history. In Anchor Link, organization leaders can grant access to view finances at-will, and will no longer need to request access to the system separately. Utilizing Anchor Link will also allow us to update your transaction list and fund balance on a more regular basis. Student center numbers will be replaced by

student organization task numbers (in Anchor Link, your task number is the External Account ID). For details, visit https://www.vanderbilt.edu/studentorgs/finances/student-organization-task-numbers.

PROCUREMENT

How do I buy goods in the new system?
Users who have been identified as a procurement requester by their business unit/entity approval group will have access to the Purchase Requisitions module in Oracle Cloud's springboard or from the Navigator menu under the heading "Procurement." From the Purchase Requisitions module, users can initiate a requisition by clicking on the Aquiire logo to browse our supplier catalogs or by initiating a requisition through the selection of a Smart Form from the Smart Forms link. Either by adding items to the Aquiire cart and "checking out" or by completing the chosen Smart Form(s), the user builds the lines of their requisition. Upon review of the requisition lines, the user can edit the costing and delivery details of each line and submit the requisition for approval. Upon completion of the required workflow for approvals, purchase orders are generated and transmitted to the suppliers.

What is a Smart Form? How do I know which one to use?
Smart Forms are available for procurement requesters to use to create requests for goods and services that are not available in the Aquiire catalog. Smart Form types include blanket orders, capital equipment, construction/furniture/facilities, general order by quantity, general order by total cost, lease, professional services, service/maintenance and subcontract.

Generally, if an item is available to purchase in the Aquiire catalog from one of our suppliers, users should purchase the item from the Aquiire catalog rather than use a Smart Form. Additional guidance as to whether and which Smart Form is appropriate for use is available on the Procurement and Payment Services website.

How does Aquiire replace eProcurement catalogs?
Aquiire is a new eMarketplace that replaces the current systems and is integrated into Oracle Cloud. Aquiire hosts catalogs from our current suppliers and allows Vanderbilt to add additional catalogs for new suppliers in the future. Additionally, Vanderbilt's faculty and staff will benefit from Aquiire's unique functionality, which allows users to search across all relevant catalogs for a single good simultaneously, comparison shop, and choose based on features, available inventories, and lowest prices.

What is the Klarity tool in Aquiire?
The Klarity tool in Aquiire enhances a user's search across multiple supplier catalogs by suggesting related search terms to refine or clarify the search request and returned search results, expediting a user's ability to select the appropriate item and continue the procurement process.

Can I still buy items outside of the catalog?
Yes. Users will continue to be able to initiate non-catalog purchase requisitions by creating a requisition from a Smart Form.

NOTE: For procurement of any goods or services, a requisition must be submitted and approved for a PO to be issued, and a PO is required for supplier payment. Confirming POs (requesting a PO after receiving an invoice from a supplier) negate important legal rights provided by the PO terms and conditions and should be avoided.

What if I need to buy something from a supplier that is not in the drop-down?
Users can initiate the process to add a new supplier to the system during the requisition process by selecting the "new supplier" checkbox in the Smart Form template or by contacting Purchasing and Payment Services in advance.

Best practice is to include the proposed supplier's W9 (U.S. company) or W8 (foreign company) tax form with the requisition to expedite the supplier set-up process.

If my requisition has already been approved, can I make changes to it?
Yes. The original requester of a purchase requisition will be able to initiate changes to a requisition by selecting the requisition from the "Manage Requisitions" panel of Oracle's Procurement module and initiating the edit order function from the Actions menu. Changes to an existing PO line can also be made after requisition approval and after the issuance of a purchase order by selecting "Manage Order."

When the required changes to a requisition would add a new line to an issued purchase order, the requester should send an email documenting the requested change with the approval of the department FUM or central approval to the assigned purchasing agent noted on the purchase order. The agent will make the change and issue the revised PO.

Can someone purchase for me on my behalf? Who receives the item in the system?
Yes. Procurement requesters have the ability to prepare a requisition on behalf of another person and can even choose the appropriate shipping/delivery address for the

person to whom the goods or services should be directed. By shopping on behalf of another, both the requester and the recipient will be able to process receipt acknowledgements in the system, assuring timely payment to suppliers and safeguarding Vanderbilt's assets by enforcing a proper three-way match.

Can I split a purchase between multiple grants or financial units?
Yes. Procurement requisition lines can be allocated among multiple grants or financial units.

How do I know if I am required to do in-system receiving?
Goods purchased through the Aquiire Catalog use a two-way match process and do not require receiving. If using a Smart Form, receiving may or may not be required. Please refer to the lists below for clarification:

Receiving IS required when using the following Smart Form types (three-way match):
- Capital Equipment
- Construction/Furniture/Facilities
- General Order by Total Cost
- Professional Services
- Service/Maintenance
- Subcontracts

Receiving IS NOT required when using the following Smart Form types (two-way match):
- Blanket Orders
- Lease
- General Order by Quantity
- Non-PO Payment Request

For VU-VUMC billing agreements, what Smart Form do I use? Will I get a notification once a PO is assigned?
The Oracle PO process with VUMC is very similar to the previous process. In fact, whatever type of eProcurement order format you used in the past, you should use the same one in Oracle (Blanket or General). Once your requisition has been approved by the purchasing agent in your area, you can look up the assigned PO in the Purchase Requisition module. The PO will appear in the Order Column with a "P" prefix. The PO number is a hyperlink; click on it to open up the PO document.

Will any of my active eProcurement purchase orders transfer to Oracle?
Yes, eProcurement purchase orders in an Open status (the PO has funds remaining on one or more lines) will automatically transfer to Oracle. Only the PO lines with remaining funds will transfer.

For example, if the PO has five lines but only line 3 has funds remaining, only line 3 will show up on the PO in Oracle. The other closed lines will not transfer. These converted POs will retain their current eProcurement PO number.

What will the "payment request" process look like?
Today's manual, paper-based check request process will be replaced by the Non-PO Payment Request. This payment request is actually a "Smart Form" that resides within the requisition module of Oracle. It will enable the requester to request payment for non-PO-based transactions while leveraging the embedded workflow within Oracle. Because the Non-PO Payment Request is initiated via Smart Form within Oracle Cloud's Procurement module, a user with the privileges of "Procurement Requester" must enter this transaction, which must be approved by the financial unit manager. This process follows the same workflow as any procurement transaction.

How can I bill someone for goods or services that my financial unit provided?
When your financial unit provides billable goods or services to an external customer, the treatment varies based on whether the service is related to a project. If the services are unrelated to a project, the department requester completes the appropriate customer charge details in the Accounts Receivable Spreadsheet template and transmits this to Finance. Finance will then review and confirm the details and upload the information into Oracle Cloud. When journals are processed in the ordinary course of business, these charges will be appropriately reflected in our financial reports.

Finance, CORES, and Grants will generate bills monthly and send to customers.

When goods or services are rendered to an external customer and are related to a project, the transaction follows the award invoicing process for grants or the CORES customer billing process. In both instances, invoicing is handled by OCGA.

When goods or services are rendered to an internal customer, the registered provider organization can bill for authorized goods or services via inter-company billing. These billings are completed via spreadsheet upload and require approval from the recipient's financial unit manager.

I went in to take action on a requisition, but I was unable to see the attachment(s) the procurement requester added. How do I view these?
The key to viewing the attachments is the "view requisition details" button, which will appear when viewing a requisition from your BPM worklist. An easy way to access this is by clicking the Bell > More Details > Procurement. Once you click the correct requisition from the pop-up screen, a new pop-up will appear. Scroll down on this screen until you see the "view requisition details" button, which is located on the left-hand side. The final screen will show the attachments.

My FUM is unable to view the attachment(s) I added to my requisition. How can they access them?
The key to viewing the attachments is the "view requisition details" button, which will appear when viewing a requisition from your BPM worklist. An easy way to access this is by clicking the Bell > More Details > Procurement. Once you click the correct requisition from the pop-up screen, a new pop-up will appear. Scroll down on this screen until you see the "view requisition details" button, which is located on the left-hand side. The final screen will show the attachments.

What should I do with customer payments (general AR) that are sent directly to my financial unit?
For general AR, deposits need to be sent to Finance in the Baker Building, Suite 900.

What should I do with customer payments (grants) that are sent directly to my financial unit?
For grants, customer payments (with supporting details) need to be transmitted directly to OCGA for deposit. End users should not deposit these transactions directly.

What should I do with customer payments (Cores) that are sent directly to my financial unit?
For Cores, customer payments (with supporting details) need to be transmitted directly to OCGA for deposit. End users should not deposit these transactions directly.

What should I do with customer payments (miscellaneous receipts) that are sent directly to my financial unit?
First, payment recipients should check with their unit's chief business officer. Business officers and their designees have received new deposit slips and cash deposit instructions for use in Oracle Cloud.

Are student receivables treated differently now?
The system is not changing, but the accounting is a little different. The receivables will be held at the entity level's balance sheet instead of centrally. The revenue related to the receivables will be posted to the balance sheet as deferred revenue until recognizable instead of recognizing revenue cash-basis and pulling it back like we do today.

GRANTS AND PROJECTS

How do I use my POET information in Procurement and Expenses?
POET information can be used on each expense item or in requisition line details to specify the funding source for the transaction. To charge using a POET string, simply enter the appropriate details in the fields on the expense item page or in the requisition line details. These details must be entered on each expense item or in each requisition line detail in your transaction to apply to each expense item and requisition line. Both expense items and requisition lines can be co-funded by multiple projects/grants or by a mixture of operational (COA) and project (POET) sources. The itemize feature is used for expense items, and requisition lines can be split from the action menu under the billing header.

What is my new grant number (POET string)?
Users can search within the system for the appropriate segment values when placing POET details on a requisition or expense report. Grants cost centers for projects existing prior to system cutover have been mapped to Oracle Cloud PPM with designated project numbers and an owning organization (financial unit). Your financial unit manager and business unit/entity approval group members have access to how this data was converted. Additionally, users can also seek help from OCGA.

Where do I go to view my balances?
Project team members will be able to view summary financial details of PPM projects for any projects to which they have been added as a team member by looking up the project in Project Financial Management. If a user does not have the Project Financial Management tile, they have not yet been added as a team member to any project. To be added to a project, users should contact their business unit/entity approval group.

Additional details, including transaction-level details of project costs, can be obtained through your financial unit manager or your business unit/entity data analyst(s).

Can I journal a cost directly onto my grant?
Generally, no. Journal entry practice changes substantially in our migration to Oracle Cloud. To make the addition of a cost to a grant, users should contact OCGA to facilitate a cost transfer.

What is PPM? How do I use it in my department?
PPM is the acronym for Project PPM is the acronym for Project Portfolio Management, and this is the tool within Oracle for tracking financial activities with certain restricted funds. There are five (5) current uses for the PPM module, each using its own template:

Grants (OCGA), CORES (OCGA), Capital Projects (Facilities), Faculty Funds (College Business Officers), and Gifts and Endowments (Development and Alumni Relations).

To charge a transaction to a project in PPM, the transaction initiator should fill out the appropriate POET information, selecting the correct Project ID, Project Owning Organization (financial unit), Expense Type, and Task.

Additional details about POET and its relationship to our chart of accounts (COA) is available on the [SkyVU website](#). Setting up a new project generally requires contacting the appropriate organization, listed in parentheticals next to each PPM use.

What is the effort certification process and timing in Oracle Cloud?
Effort certification is done within the new ecrt® application. Faculty members will certify their own effort reports and principal investigators will certify all non-faculty efforts for individuals paid off their federal grants. Effort certification reports are certified on a quarterly basis beginning March 2018.

What should I do if I receive a warning message regarding the project budget when I am charging something to that project?
Budgetary control is turned on for grants, but this is advisory only. If you receive a warning, you can click "OK" and proceed with your transaction. It will not stop the transaction.

Will I still be able to see my old grants in Oracle Cloud?
Only active awards or expired awards that have unresolved balances as of go-live or are related to ongoing active awards for reporting purposes will be brought into Oracle Cloud.

How will I know that my time is being charged appropriately against my grant?
HCM specialists and certain other system roles will be able to regularly run reports to determine an individual's labor distribution (cost allocation) and to confirm with departmental leaders that this aligns with the individual's efforts. Additionally, principal investigators, with help from effort coordinators, make quarterly effort certifications for their grants and for anyone who has worked on them during that period of time.

If you or a coworker begin working on a new or different project or if your current project is coming to an end, you should notify one of your business unit's HCM specialists early and often so that prospective changes to labor distribution can be entered timely.

How do I change the budget of my grant?

Users should submit all relevant details related to updating a grant project's budget to OCGA.

Who can charge purchases or expense reports to my grant?
By referencing the appropriate POET segments, any user can specify the project as the funding source during the creation of an expense item or when entering the requisition line details. The POET segment information should be shared with individuals, as appropriate, to ensure correct charging on a grant.

Who can charge time to my grant?
Generally, anyone who has effort devoted to the project should have their time charged to the project. To charge labor to a project, an HCM specialist can submit a prospective labor distribution change for an employee's assignment, distributing a portion of the employee's labor costs to the respective POET.

Who approves charges against my grant?
Each project has an owning organization (financial unit). The "O" of POET indicates this owning organization and routes the transaction through workflow to the respective financial unit manager for approval.

How will indirect costs be handled for grants?
The logic for the burden (F&A) rate and the basis it should be charged are set up within the PPM configurations. When awards are set up, the appropriate burden (F&A) schedule is assigned. As costs are incurred, the appropriate F&A rate will be charged to a project and posted on a daily basis. In today's system, configured F&A charges only post once at the end of the month.

Who can see the details of my grant?
By default, the principal investigator, financial unit manager, business unit/entity data analysts and approval group members, and OCGA will be project team members on each grant. Additional team members may be added to each project from time to time, as appropriate. Project team members will be able to view project demographics and summary financial details of PPM projects for any projects to which they have been added as a team member by looking up the project in Project Financial Management.

If a user does not have the Project Financial Management tile, they have not yet been added as a team member to any project. To be added to a project, users should contact their business unit/entity approval group. Additional details, including transactional-level details of project costs, can be obtained through your financial unit manager or your business unit/entity data analyst(s).

Can other people see how much I'm getting paid by looking at my labor distribution on my grant?
Generally, no. Charges are presented in summary form only and disclose the total amounts by account category related to labor attributed to a project. General user access to project financials is limited to this summary information. In the case of certain system roles, such as business unit data analysts, project cost details are available and may reveal the amounts charged to a grant by person, but this does not disclose the entire amount the person earns.

When the individual is also funded from general, unrestricted operational funds or another project, the project cost details will only show a portion of the total wages and will not disclose how much or whether the individual has additional funding sources.

NOTE: To facilitate accurate effort certification, principal investigators and effort coordinators may see complete compensation details for employees who are working on federally funded projects.

How will subcontracts be handled in Oracle Cloud?
Subcontracts are handled the same way within Oracle Cloud. OCGA will set up a PO for the subcontract, and they will receive the invoices from the sub-recipients. OCGA obtains approval from the PI/department before requesting payment on any invoices received.

Do I need to track progress reports and deliverables in Oracle Cloud?
These will not be tracked in Oracle Cloud.

What happens if I have multiple funding sources for cost share?
Each funding source has a cost-share project set up to account for the cost sharing.

How can I change the end date on a grant?
Like adjustments to grants' budgets, users should submit all relevant details related to updating a grant project's end date to OCGA.

How are supplements and no-cost extensions (NCEs) handled in Oracle Cloud?
Any additional funds received or extensions to awards are updated and reflected in Oracle Cloud.

How do I know that the charges on my grant are accounting to the right place?

Subledger accounting rules are embedded within the PPM module. These rules correctly map all charges on a grant to the correct COA segments within the general ledger.

How are trailing charges processed in Oracle Cloud?
The end date is a hard stop within the Oracle Cloud system. Charges that have an expenditure item date after the award end date are not allowed to post. If a charge has an expenditure item date that is prior to the award end date, but it does not get processed until a later accounting period after the end date, it will post as appropriate.

What does the closeout process look like in Oracle Cloud?
The majority of the closeout process occurs outside of the cloud, but it is based on the financial information captured within the award/project balances.

I want to move a charge from my grant to my financial unit (or vice versa). What do I do?
It is imperative that transactions are entered correctly by transaction initiator and reviewed carefully by the project's financial unit manager to assure accuracy. Requests to transfer costs from a grant to a financial unit must be directed with all supporting materials to OCGA for review and processing.

I want to move a charge from my grant to another project (or vice versa). What do I do?
It is imperative that transactions are entered correctly by transaction initiator and reviewed carefully by the project's financial unit manager to assure accuracy. Requests to transfer costs from a grant to a financial unit must be directed with all supporting materials to OCGA for review and processing.

How do I create reports on effort reporting?
Ecrt® delivers a multitude of reports that are available to the effort coordinators at both the department and school levels. A request for a new report would have to be sent to OCGA for assessment.

How do I create reports on my grants?
A variety of reports are available within Oracle Cloud to provide key financial information for your grant. These reports reside in the Financial Reporting Center and in Reports & Analytics (both found in the navigator). As our Oracle Cloud implementation matures, we will continue to create and publish standardized reports specific for grants. Additional information will be published for the community at regular intervals.

Can I apply ("journal") a cost directly onto my capital project?
Yes, however, directly charging the PPM project (including capital projects) by using the appropriate POET details during the requisition or expense reporting process is preferred. Generating transactional activity charging a POET from a subledger facilitates the appropriate accounting entries in both PPM and the general ledger. If a user previously did journal entries to projects to correct incorrect entries, such changes must be made in the appropriate subledger so that accounting rules account for the financial activity throughout the system. Where non-transaction activity costs need to be applied to a PPM project, a member of your business unit/entity approval group must coordinate with Facilities to create a miscellaneous batch via spreadsheet upload. Intercompany billing will occur in the same fashion, with the provider organization performing the spreadsheet upload of the miscellaneous batch.

What should I do if I receive a warning message regarding the project budget when I am charging something to that project?
We are not utilizing budgetary control for capital projects, so no warning should be generated. If a warning appears, it signifies that you are charging to a grant and is advisory only.

Who can charge purchases or expense reports to a capital project?
By referencing the appropriate POET segments, any user can specify the project as the funding source during the creation of an expense item or when entering the requisition line details.

Who approves charges against my capital project?
Each project has an owning organization (financial unit). The "O" of POET indicates this owning organization and routes the transaction through workflow to the respective financial unit manager for approval. In the case of capital projects, however, workflow will be altered. We will use the 37200-CPC as the "O" in the COA so that Facilities will be responsible for approving capital projects.

Who can see the details of my capital project?
By default, the financial unit manager, business unit/entity data analysts and approval group members, and Facilities employees will be project team members on each capital project. Additional team members may be added to each project from time to time, as appropriate. Project team members will be able to view project demographics and summary financial details of PPM projects for any projects to which they have been added as a team member by looking up the project in Project Financial Management.

If a user does not have the Project Financial Management tile, they have not yet been added as a team member to any project. To be added to a project, users should contact their business unit/entity approval group. Additional details, including transaction-level details of project costs, can be obtained through your financial unit manager or your business unit/entity data analyst(s).

Why are there three different tasks on my capital project?
Each task represents a different aspect of financial activity for transactions charged to a capital project. The first two tasks represent the capitalizable or non-capitalizable nature of a transaction. The third task is used for data converted from our legacy systems and represents previously capitalized activity.

Who is responsible for managing the capital project in the system?
Capital projects are administered within the Project Portfolio Management (PPM) module of Oracle Cloud and are managed by Facilities.

I want to move a charge from my capital project to my financial unit (or vice versa). What do I do?
It is imperative that transactions are entered correctly by a transaction initiator and reviewed carefully by the capital project's financial unit manager to assure accuracy. When a change is required, a Miscellaneous Batch upload process must be initiated by your business officer or another member of your business unit/entity approval group. This process is followed by a journal entry.

When the other project is a grant, users must submit a request with all supporting details to OCGA, which will initiate the transaction.

I want to move a charge from my capital project to another project (or vice versa). What do I do?
It is imperative that transactions are entered correctly by a transaction initiator and reviewed carefully by the capital project's financial unit manager to assure accuracy. When a change is required, a two-line Miscellaneous Batch upload process must be initiated by your business officer or another member of your business unit/entity approval group to appropriately reflect the changes in PPM.

When the other project is a grant, users must submit a request with all supporting details to OCGA, which will initiate the transaction.

Where does the budget for the capital project come from?
Capital project budgets are generally established through collaboration between Facilities and the project owner.

Can I use a program or activity on my capital project?
No. Program and Activity values are available to further distinguish financial transactions for COA activity attributable to a financial unit. Capital projects, a project type within Project Portfolio Management (PPM), are each assigned a unique project number and transactions must specify this project number and a task. For the owning organization (financial unit), these fields provide the meaningful distinguishing characteristics in lieu of Program and Activity. Tasks in capital projects are limited to either capitalizable or non-capitalizable expenses.

How many projects exist for a given Core?
Each Core is assigned a single project in Oracle Cloud's Project Portfolio Management (PPM) module. Each service line within a Core is represented as a task within the project, allowing for appropriate differentiation of financial activity.

My Core bills internal Vanderbilt financial units and projects, but also bills external customers. How do those processes work in Oracle Cloud?
Cores utilizes the C.O.R.E.S or iLab systems for reservations and billing. Each month, OCGA receives data files of all of the activity processed through C.O.R.E.S and iLab (including charges/refunds to both internal and external customers) and loads to Oracle during the month-end close process. The same business process is used in Oracle that was previously used in M&D.

What's the relationship between Oracle Cloud and iLabs?
C.O.R.E.S and iLab are the billing and reservation systems that Cores utilize to manage their core operations and billing. Oracle Cloud is Vanderbilt's general ledger system that replaced M&D. Activity in C.O.R.E.S and iLab systems are reconciled monthly to Oracle by OCGA.

Am I responsible for sending bills to my external customers?
C.O.R.E.S and iLab automatically send out invoices to the external users (unless you specify otherwise). However, it is the Core's responsibility to follow up on any outstanding invoices.

What do I do if I get a payment from a Core customer?
Consistent with our historical processes, any payments from Core customers should be sent to OCGA for processing.

We charge different external customers different rates if they're for-profit, not-for-profit, etc. How are those amounts handled in Oracle Cloud?
The rates are applied as appropriate through the C.O.R.E.S or iLab systems and are loaded to Oracle through OCGA's monthly billing close process.

Can I apply ("journal") a cost directly onto my Core?
Yes, however, directly charging the PPM project (including Cores) by using the appropriate POET details during the requisition or expense reporting process is preferred. Generating transaction activity charging a POET from a subledger facilitates the appropriate accounting entries in both PPM and the general ledger. If a user previously did journal entries to projects to correct incorrect entries, such changes must be made in the appropriate subledger so that accounting rules account for the financial activity throughout the system.

When non-transaction activity costs need to be applied to a PPM project, a member of your business unit/entity approval group must contact OCGA to create a Miscellaneous Batch via spreadsheet upload. Intercompany billing will occur in the same fashion, where OCGA will process any Cores intercompany transfers.

What should I do if I receive a warning message regarding the project budget when I am charging something to that project?
We are not utilizing budgetary control for Cores projects, so no warning should be generated. If a warning appears, it signifies that you are charging to a grant and is advisory only.

Who can charge purchases or expense reports to a Core?
Any user can specify the project, by referencing the appropriate POET segments, as the funding source during the creation of an expense item or when entering the requisition line details.

How will I purchase services from a VUMC-owned Core?
VUMC will use the CoA string and an abbreviated POET string as your external PO number. The external PO number for POET is the project number and project task with a period in between the segments, excluding any underscore for converted projects (xxxxxxxx.xxx). Center numbers previously set up in M&D will automatically be converted to the appropriate CoA or POET string in the C.O.R.E.S and iLab systems.

To establish a new external PO number from VUMC, submit a request as follows:
- Request a VU Cost Center Update in iLab (https://www.vumc.org/oor/vu-cost-center-change-ilab-request)
- Request a VU Cost Center Update in VUMC C.O.R.E.S. (https://www.vumc.org/oor/vu-cost-center-change-vumc-cores-request)

VUMC will notify you when the new external PO number has been established for use as your billing number in the VUMC Core.

Who approves charges against my Core?
Each project has an owning organization (financial unit). The "O" of POET indicates this owning organization and routes the transaction through workflow to the respective financial unit manager for approval.

Who can see the details of my Core?
By default, the financial unit manager, business unit/entity data analysts and approval group members, and OCGA will be project team members on each core. Additional team members may be added to each project from time to time, as appropriate. Project team members will be able to view project demographics and summary financial details of PPM projects for any projects to which they have been added as a team member by looking up the project in Project Financial Management.

If a user does not have the Project Financial Management tile, they have not yet been added as a team member to any project. To be added to a project, users should contact their business unit/entity approval group. Additional details, including transaction-level details of project costs, can be obtained through your financial unit manager or your business unit/entity data analyst(s).

I want to move a charge from my Core to my financial unit (or vice versa). What do I do?
It is imperative that transactions are entered correctly by transaction initiator and reviewed carefully by the Core's financial unit manager to assure accuracy. When a change is required, an inter-company transaction must be requested by your business officer or another member of your business unit/entity approval group to the Cores group within OCGA, which will process the transaction.

I want to move a charge from my Core to another project (or vice versa). What do I do?
It is imperative that transactions are entered correctly by a transaction initiator and reviewed carefully by the core's financial unit manager to assure accuracy. When a change is required, a two-line Miscellaneous Batch upload process must be requested by your business officer or another member of your business unit/entity approval group to the Cores group within OCGA, which will process all non-grants transactions.

When the other project is a grant, users must submit a request with all supporting details to OCGA grants management, which will initiate the transaction.

How do I segregate the different service lines on my Core?
Each service line in the Core is represented by a distinct task. Charges for these different service lines reference these tasks using the "T" in POET.

Who can charge time to my Core?
Generally, any employee (including student workers) that work on the Core can have a portion or all of their labor costs (based on actual effort) for an assignment charged to a project (e.g., Cores). To charge labor to a project, an HCM specialist can submit a prospective labor distribution change for an employee's assignment, distributing a portion of the employee's labor costs to the respective POET.

Can other people see how much I'm getting paid by looking at my labor distribution on my Core?
Generally, no. Charges are presented in summary form only and disclose the total amounts by account category related to labor attributed to a project. General user access to project financials is limited to this summary information. In the case of certain system roles, such as business unit data analysts, project cost details are available and may reveal the amounts charged to a core by person, but this does not disclose the entire amount the person earns.

When the individual is also funded from general, unrestricted operational funds or another project, the project cost details will only show a portion of the total wages and will not disclose how much or whether the individual has additional funding sources.

Can I use a program or activity on my Core?
No. Program and Activity values are available to further distinguish financial transactions for COA activity attributable to a financial unit. Cores, a project type within Project Portfolio Management (PPM), are each assigned a unique project number and transactions must specify this project number and a task. For the owning organization (financial unit), these fields provide the meaningful distinguishing characteristics in lieu of Program and Activity. Tasks in cores projects are used to represent each different service line of the Core.

GIFTS AND ENDOWMENTS

Can I apply ("journal") a cost directly onto my gift?

Yes, however, directly charging the PPM project (including gifts) by using the appropriate POET details during the requisition or expense reporting process is preferred. Generating transaction activity charging a POET from a subledger facilitates the appropriate accounting entries in both PPM and the general ledger. If a user previously did journal entries to projects to correct incorrect entries, such changes must be made in the appropriate subledger so that accounting rules account for the financial activity throughout the system.

When non-transaction activity costs need to be applied to a PPM project, a member of your business unit/entity approval group should coordinate with Development and Alumni Relations to create a Miscellaneous Batch via spreadsheet upload. Intercompany billing will occur in the same fashion, with the provider organization performing the spreadsheet upload of the Miscellaneous Batch.

What should I do if I receive a warning message regarding the project budget when I am charging something to that project?
We are not utilizing budgetary control for Gifts and Endowments projects, so no warning should be generated. If a warning appears signifying that you are charging to a grant, it is advisory only.

How can I see the amount available on my gift?
As a project team member on the PPM project, users will be able to view project demographics and summary financial details of PPM projects for any projects to which they have been added as a team member by looking up the project in Project Financial Management. Within the project financial summary, the user will see the current balance of the gift. Additional details, including transaction-level details of project costs, can be obtained through your financial unit manager or your business unit/entity data analyst(s). User visibility into transactions charged to a faculty fund is limited to transactions originating in Oracle Cloud. Historical activity will be available to certain data analysts in Vanderbilt's data warehouse.

NOTE: If a user does not have the Project Financial Management tile, they have not yet been added as a team member to any project. To be added to a project, users should contact their business unit/entity approval group.

How will I know that my time is being charged appropriately against my gift?
HCM specialists and certain other system roles will be able to regularly run reports to determine an individual's labor distribution (cost allocation) and to confirm with departmental leaders that this aligns with the individual's efforts.

If you or a coworker begins working on a new or different project or if your current project is coming to an end, you should notify one of your business unit's HCM

specialists early and often so that prospective changes to labor distribution can be entered timely.

Who can charge purchases or expense reports to my gift?
By referencing the appropriate POET segments, any user can specify the project as the funding source during the creation of an expense item or when entering the requisition line details.

Who can charge time to my gift?
Generally, any employee (including student workers) can have a portion or all of their labor costs for an assignment charged to a project (e.g., gift). To charge labor to a project, an HCM specialist can submit a prospective labor distribution change for an employee's assignment, distributing a portion of the employee's labor costs to the respective POET.

Who approves charges against my gift?
Each project has an owning organization (financial unit). The "O" of POET indicates this owning organization and routes the transaction through workflow to the respective financial unit manager for approval.

Who can see the details of my gift?
By default, the financial unit manager, business unit/entity data analysts and approval group members, and Development and Alumni Relations employees will be project team members on each gift. Additional team members may be added to each project from time to time, as appropriate. Project team members will be able to view project demographics and summary financial details of PPM projects for any projects to which they have been added as a team member by looking up the project in Project Financial Management.

If a user does not have the Project Financial Management tile, they have not yet been added as a team member to any project. To be added to a project, users should contact their business unit/entity approval group. Additional details, including transactional-level details of project costs, can be obtained through your financial unit manager or your business unit/entity data analyst(s).

Can other people see how much I'm getting paid by looking at my labor distribution on my gift?
Generally, no. Charges are presented in summary form and only disclose the total amounts by account category related to labor attributed to a project. General user access to project financials is limited to this summary information. In the case of certain

system roles, such as business unit data analysts, project cost details are available and may reveal the amounts charged to a gift by person, but this does not disclose the entire amount the person earns.

When the individual is also funded from general, unrestricted operational funds or another project, the project cost details will only show a portion of the total wages and will not disclose how much or whether the individual has additional funding sources.

I want to move a charge from my gift project to an operating COA (or vice versa). What do I do?
It is imperative that transactions are entered correctly by a transaction initiator and reviewed carefully by the gift's financial unit manager to assure accuracy. When a change is required, a Miscellaneous Batch upload process must be initiated by your business officer or another member of your business unit/entity approval group. This process is followed by a Journal Entry.

When the other project is a grant, users must submit a request with all supporting details to OCGA, which will initiate the transaction.

I want to move a charge from my gift to another project (or vice versa). What do I do?
It is imperative that transactions are entered correctly by a transaction initiator and reviewed carefully by the gift's financial unit manager to assure accuracy. When a change is required, a two-line Miscellaneous Batch upload process must be initiated by your business officer or another member of your business unit/entity approval group to appropriately reflect the changes in PPM.

When the other project is a grant, users must submit a request with all supporting details to OCGA, which will initiate the transaction.

Where does the budget for the gift come from?
Budgets are not populated in gift and endowment projects; however, in coordination with Development and Alumni Relations Finance, users can create appropriate budgets for gift projects. These can be entered by business unit/entity approval group members (with additional access to certain other members of the Vanderbilt community in the future).

Can I use a program or activity on my gift?
Yes. Program and Activity values are available to further distinguish financial transactions for COA activity attributable to a financial unit. Gifts, a project type within Project Portfolio Management (PPM), are each assigned a unique project number and

transactions must specify this project number and a task. For the owning organization (financial unit), these fields provide the meaningful distinguishing characteristics in lieu of Program and Activity.

NOTE: Transactions charged to Gifts projects will always use Task 1.

What's the relationship between Oracle Cloud, Fundriver, and Advance?
Oracle Cloud is our main repository of all financial activity for the university and houses our general ledger and a variety of subledgers. Other sub-ledgers are third-party systems. Fundriver and Advance are two such systems, which are managed by Development and Alumni Relations. These systems manage our gifts and endowments and create appropriate accounting entries in the Gifts and Endowment Subledger, which generates summary data for Oracle Cloud's general ledger.

How are different restrictions (i.e., temporarily restricted) handled in Oracle Cloud?
- Unrestricted gifts and endowment distributions post as revenue through NAC05.
- Unrestricted gift and endowment distributions that have been internally designated for specific purposes and/or require specific tracking post as revenue in NAC26.
- Temporarily restricted gift and endowment distributions post as revenue in NAC40.

STUDENTS

How does the financial aid process change?
Generally
All loans, scholarships, awards (including "undergraduate stipends"), and prizes will be processed by the Office of Student Financial Aid and Scholarships (OFSA) using an updated form (which is available from OSFA). These monies will be applied to the student's record in our student systems (YES/Campus Solutions), and any outstanding balances will offset the received amount by the student. When a student account refund is generated, these payments will be made through Accounts Payable by Procurement and Payment Services.

Graduate and Professional Students
Graduate and professional students' stipends will continue to be processed through the HR system (now Oracle Cloud HCM), which is consistent with existing practices in our legacy systems.

Undergraduate Students

Undergraduate research and other stipends that are not considered employment will be sent through OSFA.

How do I manage undergraduate student stipends in Oracle Cloud?
Undergraduate student stipends are managed by the Office of Financial Aid. For more information about initiating a stipend payment to a student, contact the Office of Financial Aid.

NOTE: Undergraduate stipends will be applied to a student's account, and any outstanding balances will offset the amount received by the student.

How do I manage graduate student stipends in Oracle Cloud?
Graduate or professional student stipends (service-free payments) are applied to graduate or professional students by creating the appropriate HCM record in Oracle Cloud. HCM specialists (and certain line managers) have the appropriate system roles to initiate this transaction in Oracle Cloud HCM.

Additional information on processing new graduate or professional student stipends is available in the Learning Exchange within the HCM specialists' curriculum.

How do I manage my undergraduate employees/their employment in Oracle Cloud?
Your business unit's HCM specialist will be able to hire student workers into Oracle Cloud. If your student holds an active position in another work unit, your HCM specialist will need to collaborate with that unit's HCM specialist or Student Employment. Students will enter their time directly into Oracle Cloud, and their respective line managers will approve their time cards.

If a student has multiple assignments, even in different business units, the HCM specialists in both business units and Student Employment will be able to see complete details of the student's employment with the university, including the hours worked under each assignment and in total.

How are expense reimbursements for students managed in Oracle Cloud?
A student will be allowed to submit an expense report directly in Oracle Cloud. If a student does not currently have access to Oracle Cloud by virtue of Student Employment or otherwise, an HCM specialist will be able to search for the student's account within Oracle Cloud for verification and can add the student in a non-worker assignment to facilitate submission of expense reports.

Student expense items are entered in the same manner as any faculty or staff expense item in Oracle Cloud. Students may need assistance in selecting the appropriate COA or POET strings to charge the transaction.

How does student timekeeping work in Oracle Cloud?
Student workers will enter their time directly into Oracle Cloud's Time and Labor module in the same fashion as any other Vanderbilt staff member assigned to a biweekly payroll. From the Navigator, students will click on "Time" under the heading "About Me" and complete the calendar-based time entries for the periods of time worked at or immediately after the conclusion of the time worked.

Prompt entry of time ensures accuracy and reduces the risk that a student will erroneously under-report time worked. As a student worker, students are restricted in the total amount of hours they are permitted to work. Student employees' line managers, HCM specialists, and Student Employment will be able to monitor students' worked hours to prevent a student from exceeding the maximum permissible working time.