# General

1. **Who to contact with BlueSky questions not addressed in the FAQ, trainings, toolkits, or BlueSky Help?**
   - General BlueSky questions: BlueSky@depaul.edu
   - ERP (Finance) questions: Contact your Financial Services team.
   - HCM (Human Capital Management) questions: Contact your HR representative.

2. **What is the role of Financial Services now that BlueSky is in place?**

   Please contact your Financial Services team for help with budget transfers, journal entries and salary reallocations. In addition, Financial Services will be available to help train and guide employees through this transition and will be available for any finance-related questions you may have.

3. **Does Cost Center = DeptID?**

   There is a terms sheet now available that shows changes in terminology.

4. **Who is a Cost Center Owner?**

   If you were listed as Budget Manager on a DeptID in PeopleSoft, you have been configured as Cost Center Owner in BlueSky.

# Transaction Approvals

5. **Will the system notify a user when action on a transaction is required?**

   An email will be sent when there are transactions requiring approval.

   ProCard transactions will not get an email each time a transaction is loaded but they will show up as action items on the bottom of your BlueSky home screen.

6. **Can cost segments be edited by the Cost Center Owner in the approval process?**

   Only the submitter/requestor of the expense or purchase can change account segments. Approvers are not able to edit requests. If a change is needed, the transaction should be rejected with a note on what to change. The requester can then re-submit with the edit.

7. **Is it possible to reassign approval rights to a person other than the Cost Center Owner?**

   An approver can delegate their approval authority for a specific function (all Expense Reports or all Requisitions). However, they cannot pick which Cost Centers to delegate. When they delegate, they do it for all of their approvals within a module. Additionally, an individual can only delegate a specific function to one other person.

8. **Who approves the Cost Center Owner's transactions?**

   For reimbursements and ProCards, an employee's supervisor will be called in to the workflow if the expense report is coded to a Cost Center that the employee owns.

   For requisitions, when submitting to your own Cost Centers no further approvals will be added to the existing approval chain.

## Financial Reports

**9. Will Mobius have any role at all moving forward?**

New reports will be published in BlueSky that will replace your Financial Activity Reports. Until then, Mobius reports through 12/31/20 are still available at the same URL as before. Detail from FY20 & FY21, as well as summary level information from the previous five years, will be migrated to BlueSky. If you require any detail information not available in BlueSky, please contact your Financial Services liaison.

**10. Who will have reporting access in BlueSky?**

Cost Center Owners will have access to the reporting they need through BlueSky. Other users can be granted reporting access upon request with the proper approval. Please discuss your requests with your Financial Services Liaison.

## Cost Center Ownership Access and Delegations

**11. Can there be more than one Cost Center Owner for a department?**

Each Cost Center has one owner, although the Cost Center Owner authority can be delegated.

**12. What steps would the cost center owner take in order to delegate approval functions?**

Please find a delegations training here.

**13. Is a Principal Investigator (PI) on a grant the same as a Cost Center Owner?**

PIs will be assigned as Project Manager on their grant project. A Project Manager is a different role than Cost Center Owner, although the concept is similar. Approval will route based on the project number instead of the cost center and the approval occurs up front the same as an approval routed to a cost center.

## General Financial Transactions

**14. Which cost centers do employees have access to?**

All employees have access to see Cost Centers within their home VP/Dean area.

**15. What are the differences in chartfields/segments from PeopleSoft to BlueSky?**

Cost Centers are the same as DeptIDs, except for those relating to projects. Fund Codes and Program Codes are also the same.

The only real change is Class, this will now by a numeric value rather than alpha and it will be known as Activity.

A segment string looks like this: 100.671100.553400.65.10.00000.0000.00 and it represents:
Fund.CostCenter.Account.Activity.LegalEntity.Program.FutureUse1.FutureUse2

## Expenses

**16. Is every employee required to submit their reimbursement documents here from now on?**

Yes, all employees will need to submit reimbursement requests/documents via this page.

**17. How do I reconcile ProCard charges or enter a reimbursement on behalf of someone else?**

The person you are entering for will have to follow the instructions called “Expense Entry Delegation” found in the BlueSky Help tool.

**18. Is what used to be known as a proxy now a preparer?**

Yes, the preparer is essentially the proxy. The only change would be in addition to being able to prepare ProCard expense reports, this delegate will now be able to submit Cash Reimbursements on your behalf as well.

**19. If expense entry is delegated to a "preparer," does the owner retain ability to enter?**

Yes, owners retain their ability to enter.

**20. Can students who are not employees enter expenses for reimbursement?**

Non-employees (including students) will submit reimbursements on the old form. Please send these completed forms to AP for payment.

Student employees can submit their reimbursement requests in BlueSky; however, if student employees are not hired into the VP/Dean unit for which they are requesting a reimbursement, they won't have access to the Cost Center in BlueSky and would need to use the old form as well.

**21. How do we split transactions that need to go to separate Cost Centers?**

In the expense module individual transaction items cannot be split. In order to split a charge, you must add it to an Expense Report and then split the distribution on that Expense Report. That split can only be done by %, so some calculation might be necessary.

**22. When creating an expense item, one needs to choose a “Template” from a drop-down list. What does each selection (item on the drop down list) refer to?**

- Capital Expense Report: Template for Capital Projects
- DePaul Travel and Procurement: Template for standard operating expenses
- Facilities Expense Report: Template for Facility Operations
- Grant Expense Report: Template for Grant Expenses

**23. How can I add an Ad hoc Expense Report Approver?**

Open the submitted expense report, click on “Actions”, and choose “Ad hoc Route”. In the “Route Task” window, choose “single Approver,” add your comments for the ad hoc approver and perform an advanced search to look up the user you would like to choose as your ad hoc approver.

**24. Should the segments on a transaction automatically be coded to my Cost Center?**

The Cost Center on a transaction defaults based on your position. If your expenses do not typically get paid out of the same Cost Center as your position, we have the opportunity to change the default. Please contact your FS liaison.

## Purchasing and Requisitions

**25. How do I set my delivery location?**

Within the Requisition Page, there is a Locations field where you can see all locations. There should be a location for every floor of every DePaul building. If there are additional locations required, please reach out to Financial Services.

**26. Can items be delivered to non-DePaul addresses?**

You can purchase items from Amazon and have them shipped to alternate addresses. There is a process document on that, please reach out to Lori Lehnhardt in Procurement for more details.

**27. Do adjunct faculty have access to submit requisitions?**

Yes, all FT & PT (non-student) employees have access to Procurement.

**28. How are POs split-funded?**

You would have the opportunity to add lines when adding the requisition. If you are funding between multiple VP/Dean areas, you may not have access to split, in which case you should reach out to your Financial Services liaison for assistance.

**29. Do we still use the requisition process to start contract review, attaching the contract, contract review form, and any other documentation?**

Yes, the requisition process is similar and routing through contract review will occur the same way. You submit the requisition with the unsigned contract attached. It routes via Procurement to the Office of the General Counsel if contract review is required.

**30. What if the requestor doesn't have access to the Cost Center to which the purchase should be applied?**

If the expense needs to be coded to a Cost Center outside of the employee’s VP/Dean area, then a journal entry will need to be completed. If this is a recurring exception (i.e., not a one off), then we can make a security exception to give that employee the appropriate security access.

**31. Does the integrated catalog limit the options for what we can purchase from these vendors?**

Integrated catalogs show all available products in a catalog. Some products have warning messages, but otherwise it is not restricted. Once the transactions come into BlueSky, specific types of transactions will require specific approvals.

## Amazon

**32. Does an employee need to login with an Amazon Business account name/password?**

When you click the Amazon catalog link through BlueSky, you are already signed into DePaul’s Amazon Business account. This already has tax exemption factored in. If you have a Business account under your depaul.edu address, it will already have been migrated to the university's profile.

**33. Are Gift Cards restricted for purchases on Amazon?**

Gift Cards are restricted in BlueSky as they cannot be paid by an invoice (per Amazon). The user will need to order them through the Amazon Business website directly with their ProCard. They will be routed to Procurement Department for approval and they'll need a copy of the approved pre-authorization form for Gift Certificates.

**34. For catalog purchases, are we uploading any receipts, invoices, documentation from Amazon?**

No, this is an integrated process. You will only have to "receive" the goods in the system for the invoice to be paid automatically upon receipt.

**35. Is Cost Center Owner approval required for all Amazon purchases?**

Yes, the Cost Center Owner approves all Amazon business purchases. The purchase will not be complete until this approval is received.

**36. Are we required to use the Amazon catalog, or can we continue to use Amazon with our ProCards via a web browser?**

Yes, using the Amazon Catalog through BlueSky is now a requirement.

**37. Do all Procurement purchases need to be received in BlueSky?**

Yes, all purchases, including catalog purchases and services will need to be received. This step must be taken in order for the invoice(s) to be paid.

## Invoices/Honoraria

**38. How do we pay a vendor invoice?**

Invoices should be sent to the Accounts Payable (AP) inbox. There is a preference to have Suppliers send invoices directly to the same AP inbox.

**39. Who should be contacted to find out an AP payment status?**

Please reach out to AP with a copy of the item in question (i.e., invoice, reimbursement, etc.)

**40. What is the process for honorariums?**

Honorarium payments will function similar to how they did in the PeopleSoft system with a couple of key differences.

1. We are encouraging all vendors (including speakers and other payment recipients) to use a new tool called the Supplier Portal. This tool is used to register a vendor and it ensures we no longer have to communicate sensitive data on paper forms or via email.

2. The general Honorarium agreement form is updated accordingly and is available now on the Financial Affairs website.

Once the speaker is registered as a vendor in the supplier portal, he/she will receive a registration number and there is a spot on the new agreement form to add this number. Once the agreement is executed, please fill out a Voucher Check Requisition form as you normally would.

41. **Will check requests will now go directly to AP instead of going to Financial Services?**

    Check requests can go to AP directly. If there are questions, please work with Financial Services.