



UCPath – UCB

Deep Dive Sessions
April – May – June 2018

Objectives for Deep Dive Sessions

Focus on:

- Discovery and information gathering
- Understanding pre-work, post-work and handoffs
- Finding process improvement opportunities

Identifying how UCPath templates, processes and approval workflow can OPTIMIZE campus business practices

Deep Dive Sessions

Approach

- Review end-to-end process for business area
- Examine process steps to see where template Initiation and Approval can occur within process
- Review Initiator and Approver roles and knowledge/skills required
- Begin identifying Initiators and Approvers as appropriate for these activities
- Also – Identify and document further business process adaptations and external system changes that could streamline, standardize and optimize future state

Local Business Process Design - Guiding Principles

Sponsor Alignment	<ul style="list-style-type: none">• Develop efficiency in end-to-end business process• Use UCPATH delivered functionality• Minimize additional cost• Eliminate double data entry
Diverse Campus Stakeholders	<ul style="list-style-type: none">• Involve both academics and staff (at multiple levels)• Maintain a customer focus
Disciplined Process	<ul style="list-style-type: none">• Ensure implementation focus• Use UCPATH delivered templates and approval workflow• Document decisions for clarity and commitment
Openness to Change	<ul style="list-style-type: none">• Maintain enterprise-wide perspective• Be open to process and role changes• Be transparent with communications

Two-Day Discovery Sessions

Position
Data

Position
Funding

TAM

WFA
Templates

PayPath
Data
Changes

Leaves

Additional
Pay
Final /
Off-Cycle
Pay

Direct
Retro

For each processing area:

- Overview and business process context for transaction
- Transaction demonstration
- Knowledge and skills needed for transactional role
- Discuss workflow and potential approval scenarios

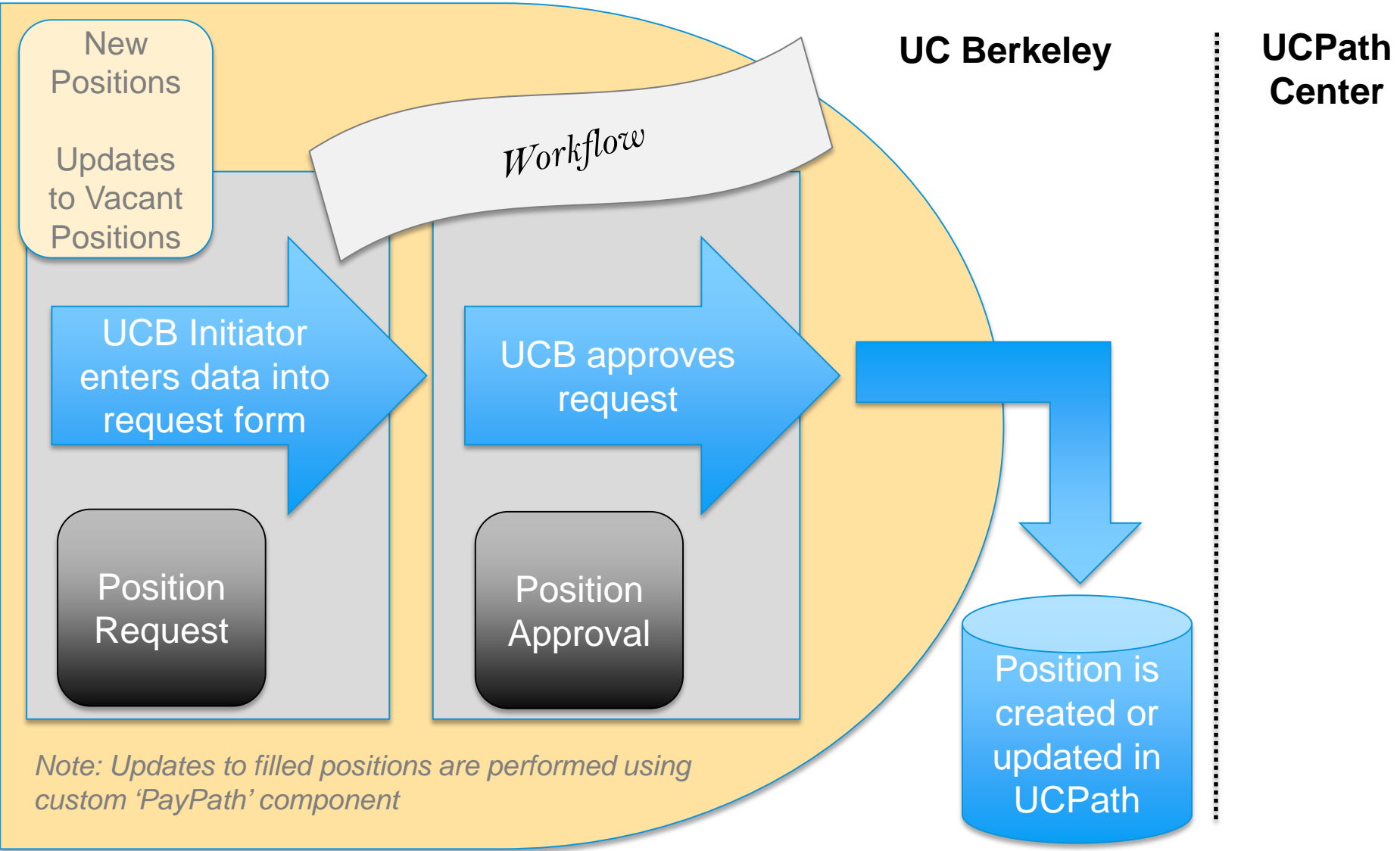
Position Management (New/Vacant Positions)

UCPath Position Management Overview

- A position represents a filled or vacant role in a department
- All employees, and CWRs who supervise others, will be in a Position
- UCPath Position data include Job Code, Department, FLSA, Location, Reports To, Salary Plan/Grade, Headcount, *FTE and ERC
- Position numbers are sequential – all campuses in same numbering system
- Funding is linked to Position and set up on the Funding Entry page in Commitment Accounting
- Position data elements, including Funding and Reports To, are tied to all incumbents sharing a Position and are not editable on individual Job records – likely means breaking out multi-headcount positions to single headcount in many cases



Position Management Business Process



Approval Routing

- At least one Approver level is required per template type
- Transaction is routed to all Approvers at that level with data permissions for that record
- Campus could add branching by Employee Class groupings
- Approvers receive email with link to approve transaction; approval link also appears in Approver's UCPath Worklist
- 1st Level Approver can "approve" or "deny" back to Initiator with comments; 2nd and 3rd Level Approvers can also "push back" to previous Approver
- Some templates allow Approvers to edit certain fields, but may be routed to another Approver for approval
- Approvers can add Ad Hoc Approvers, with Approver role and data permissions to access record
- Approval routing rules apply to campus as a whole



Position Request and Approval (New / Vacant)

UCB Initiator Role

Template(s) Position Request

Knowledge/Skills

- Familiarity with vacant and filled positions in department
- Knowledge of policies, procedures and processes applicable to Position Management
- Understanding of Position Management business rules and guidelines
- Expertise in Position Data template entry and processing
- Attention to accuracy and detail to identify and enter correct and appropriate values
- Proficiency in PeopleSoft navigation, data entry, search techniques and business rules

UCB Approver Role

Template(s) Position Approval

Knowledge/Skills

- High-level understanding of organizational and financial impact of transaction
- Understanding of duty and accountability
- Commitment to thorough review and response

Note: There is also a UCB Position Administrator Role with direct access to Position Data and correction capability