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**
- Develop efficiency in end-to-end business process
- Use UCPath delivered functionality
- Minimize additional cost
- Eliminate double data entry

**Diverse Campus Stakeholders**
- Involve both academics and staff (at multiple levels)
- Maintain a customer focus

**Disciplined Process**
- Ensure implementation focus
- Use UCPath delivered templates and approval workflow
- Document decisions for clarity and commitment

**Openness to Change**
- Maintain enterprise-wide perspective
- Be open to process and role changes
- Be transparent with communications
Two-Day Discovery Sessions

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

New Positions
Updates to Vacant Positions

Workflow

UCB Initiator enters data into request form
UCB approves request
Position is created or updated in UCPath

Note: Updates to filled positions are performed using custom 'PayPath' component
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*