



UCPath Template Deep Dives

Position Funding

April 2018

Objectives for Deep Dive Sessions

Focus on:

- Discovery and information gathering
- Understanding pre-work, post-work and hand-offs
- Process improvement

Identifying how UCPath templates, processes and workflow can optimize your business practices

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

Review Types of Templates

Position
Data

Position
Funding

TAM

WFA
Templates

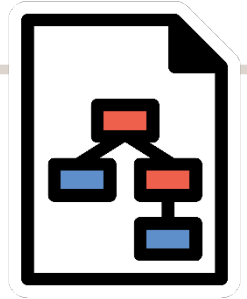
PayPath
Data
Changes

Leaves

Additional
Pay
Final /
Off-Cycle
Pay

Direct
Retro

Workflow Approver Routing



- At least one Approver level per template type, up to three levels depending on template
- Transaction is routed to all Approvers at that level with data permissions for that record
- Can optionally add branching by Employee Class groupings
- Workflow routing rules apply to campus as a whole

Approver Capabilities



- Approvers receive an email link to approve transaction in UCPath
- 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
- Approvers can edit certain fields based on template, but transaction will be routed to another Approver for approval
- Approvers can add Ad Hoc Approvers, with Approver role and data permissions to access record

Deep Dive Sessions

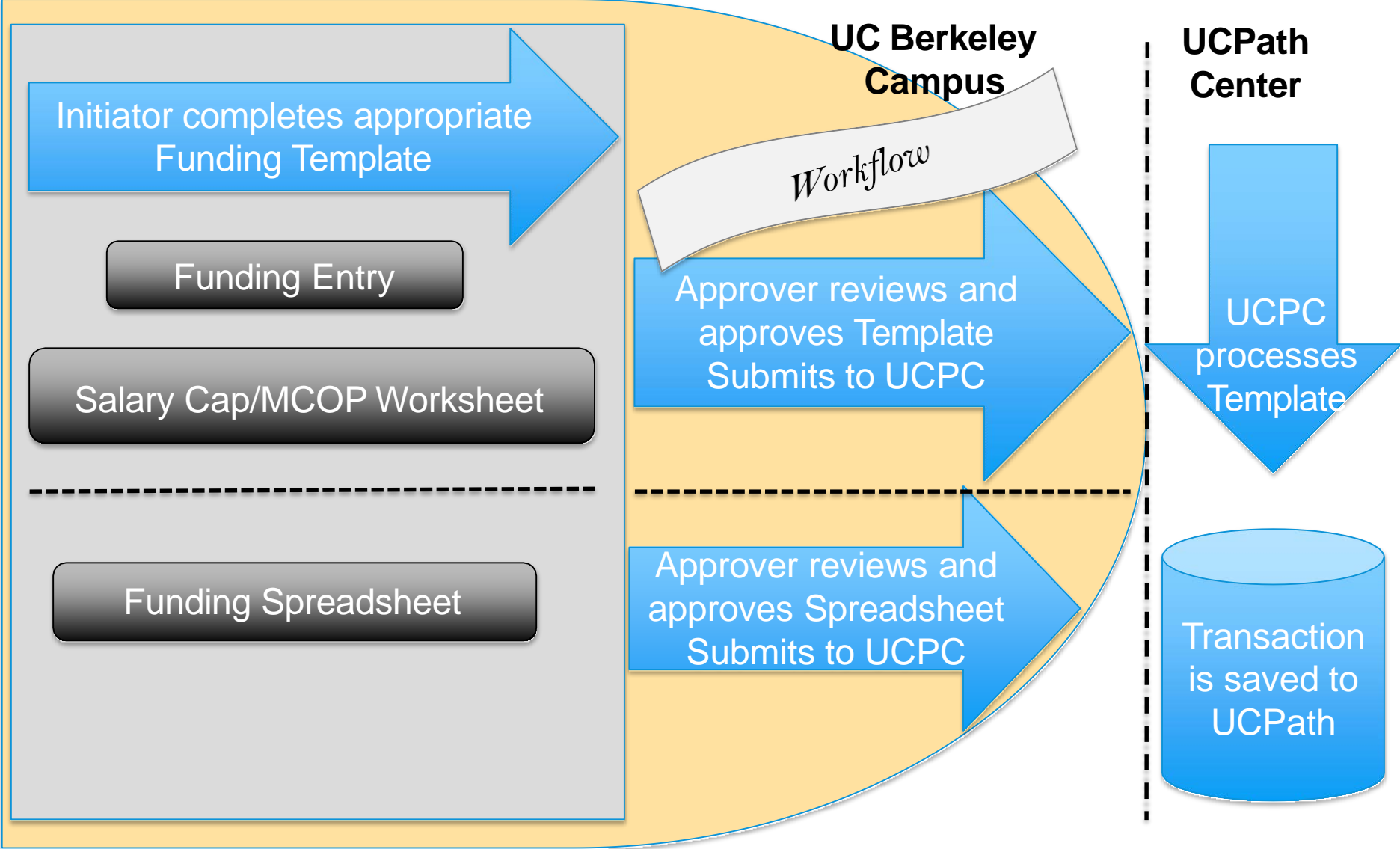
Approach

- 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

Position Funding Process Overview

- Funding no longer tied to Job Data; connected to the Position.
- Separate transaction from Position and Hiring requests, allowing for new roles specifically to approve financial impact of transaction
- Create/change funding at the position or department level.
- Enter/update funding using the **Funding Entry** template in HCM Commitment Accounting.
- Position pool level where groups of positions share funding will be used for Work Study programs.
- Use Salary Cap/MCOP Worksheet for an incumbent with capped funds and/or multiple components of pay.

Funding Entry Process Flow



Position Funding – Create and Approval

UCB Initiator Role

Template(s) Funding Entry (new or changes to funding)

Knowledge/Skills

- Understanding of applicable policies, procedures and processes to Position Funding
- 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) Funding Entry

Knowledge/Skills

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

DEMO