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

<table>
<thead>
<tr>
<th>Category</th>
<th>Principles</th>
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<tbody>
<tr>
<td><strong>Sponsor Alignment</strong></td>
<td>• Develop efficiency in end-to-end business process</td>
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<td>• Use UCPath delivered functionality</td>
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<td></td>
<td>• Minimize additional cost</td>
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<td></td>
<td>• Eliminate double data entry</td>
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<td><strong>Diverse Campus Stakeholders</strong></td>
<td>• Involve both academics and staff (at multiple levels)</td>
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<td>• Maintain a customer focus</td>
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<tr>
<td><strong>Disciplined Process</strong></td>
<td>• Ensure implementation focus</td>
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<td>• Use UCPath delivered templates and approval workflow</td>
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<td>• Document decisions for clarity and commitment</td>
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<td><strong>Openness to Change</strong></td>
<td>• Maintain enterprise-wide perspective</td>
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<td>• Be open to process and role changes</td>
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<td>• Be transparent with communications</td>
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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

Initiator completes appropriate Funding Template

- Funding Entry
- Salary Cap/MCOP Worksheet
- Funding Spreadsheet

Approver reviews and approves Template
Submits to UCPC

Approver reviews and approves Spreadsheet
Submits to UCPC

Transaction is saved to UCPath

UC Berkeley Campus

UCPath Center

UCPC processes Template
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