



UCPath – UC Berkeley

Future State Business Process Discovery & Design Kick-Off

03/8/2018

Thank you for
joining us today!

Today we will be
sharing with you what we know
and what we don't yet know.

When we end today's meeting, we hope you:

- ☐ Understand the purpose of the two day **March 13-14 session**.
- ☐ Confirm/**identify SMEs** from your team to participate.
- ☐ **Support participation required** in future deep dive sessions.

Agenda for Today

- Identify pain points that exist today, expectations from UCPath, and understand how UCPath might or might not address them.
- Review high-level project, timelines, guiding principles, and what's not on the table.
- Review the purpose for the March 13-14 two-day session.
- Walk through an example of a transaction.
- Answer as many of your questions as possible!

What is UCPath?

A single payroll, benefits, human resources, and academic personnel solution for all UC campuses that goes live for UC Berkeley in March 2019.

What is UCPath?



Academic Personnel Solution

Payroll

UCPath = Benefits

Human Resources

Expectations from UCPath

- Employees get paid correctly and on time (especially final pay)
- Better MLA coordination, related processes and information flow between locations
- Clarity on processing times, implications of UCPC support, and UCB/UCPC responsibilities
- Availability and accuracy of data for DDODS for interfaces
- System-wide consistency and metrics in reporting
- Roles and responsibilities appropriate for transaction/business area
- Increase in efficiency which translates to reduced/eliminated duplication of effort

What are we missing?

How might UCPath help address the expectations?

- Employees get paid correctly and on time (especially final pay) - **using integrated Payroll system with HCM (UCPath)**
- Better MLA coordination, related processes and information flow between locations - **UC-wide system and UCPC involvement will improve coordination**
- Clarity on processing times, implications of UCPC support, and UCB/UCPC responsibilities – **in progress working with UCPC to identify**
- Availability and accuracy of data for DDODS for interfaces – **provisioned by DDODS nightly burst**
- System-wide consistency and metrics in reporting – **Use UCB CDM instance for reporting**
- Roles and responsibilities appropriate for transaction/business area – **defined during local business process design sessions**
- Increase in efficiency which translates to reduced/eliminated duplication of effort - **defined during local business process design sessions**

UC Berkeley Future State Design Scope

Out of scope for design

- System design and support provided centrally
- Processing and data flow within UCPATH: Input to UCPATH is only permitted through templates or mass update files - Deductions and time keeping are only inbound interfaces to UCPATH
- Wholesale replacement of external ticketing systems and processes
- When we implement UCPATH (March 1, 2019)

In UCB control/scope

- Local roles, responsibilities and workflow
- Business process and data flow at UC Berkeley, keeping in mind that the only way to interact with UCPATH is through templates or mass update files
- Enhancement and modification of external ticketing systems and processes to optimize UCPATH capabilities
- How prepared we are as an organization for a successful implementation

Project Planning - UC Wide

2018

2019

A > M > J > J > A > S > O > N > D > J > F > M > A > M > J > J > A > S > O > N > D

Los Angeles,
Santa Barbara
(~60k EEs)

9/1/18

Berkeley, Davis, Irvine, ANR
(~78k EEs)

3/1/19

TAM/ePerf

Santa Cruz, San Francisco,
San Diego, Hastings, LBNL
(~70k EEs)

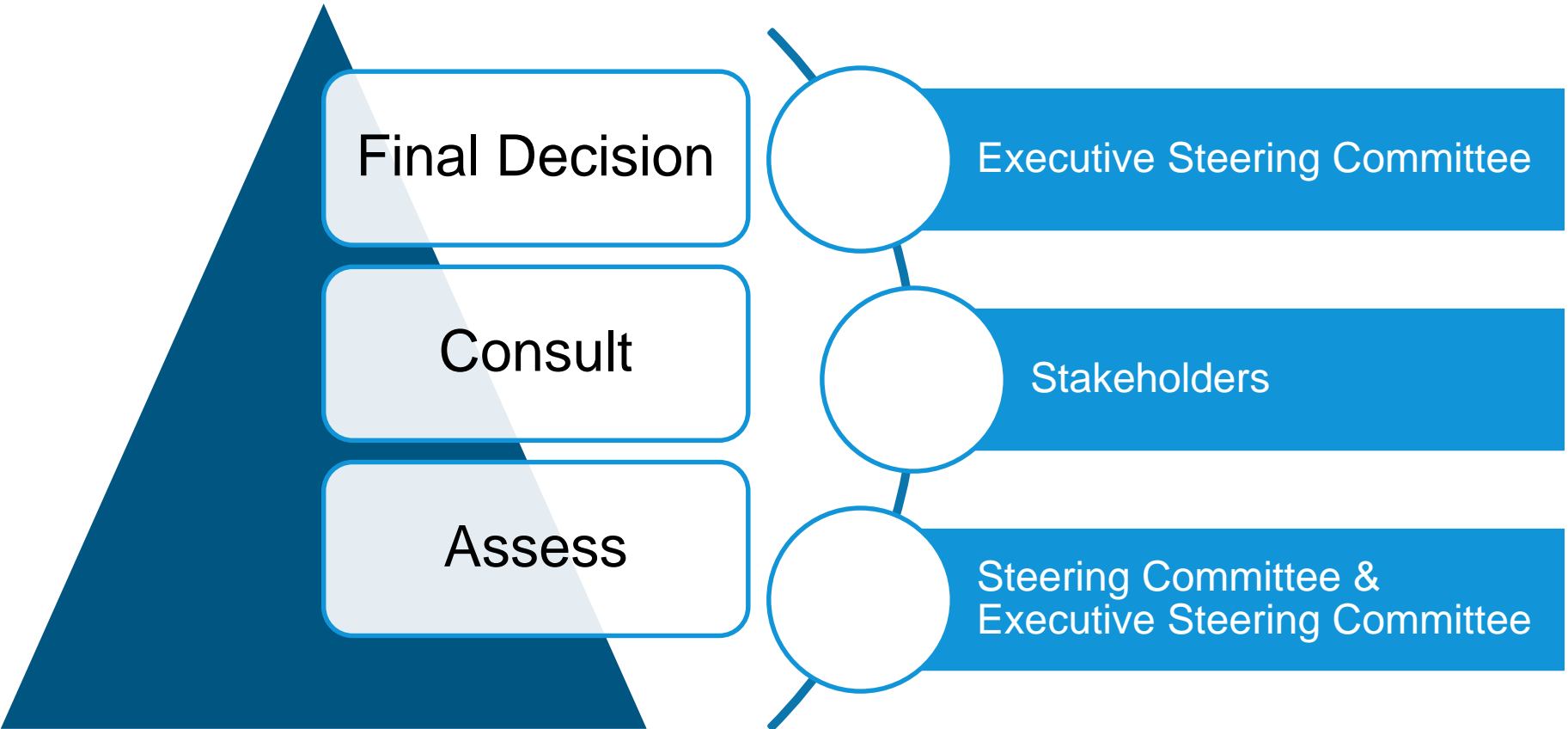
9/1/19

Project Planning – UC Berkeley



Local Business Process Design

Process



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

Local Business Process Design – Meetings



Attendees: Central HR, APO, Controller's Office, CAO, Department HR, & CSS/ERSO

March 13-14 Cross-Functional Discovery Sessions

Goal

- Provide a foundational understanding of UCPATH transactions, process steps and workflow
- Enable participants to begin identifying roles and adapting work processes to optimize UCPATH capabilities at UC Berkeley

Format

- Overview and business process context for transaction
- Demonstrate transaction
- Knowledge and skills needed for transactional role
- Discuss workflow and walk through potential approval scenarios

Position
Data

Position
Funding

TAM

WFA
Templates

PayPath
Data
Changes

Leave
Manage-
ment

Additional
Pay
Final / Off-
Cycle Pay

Direct
Retro

Foundational Changes in UCPath

Approval Workflow

- Data are entered into request templates at outset of process and, once approved, moved into live records, eliminating substantial double-entry at end of process

Distributed Roles and Responsibilities

- Individuals directly impacted by requested action have hands-on role in initiating and approving transactions, reducing back-and-forth activity in external routing systems

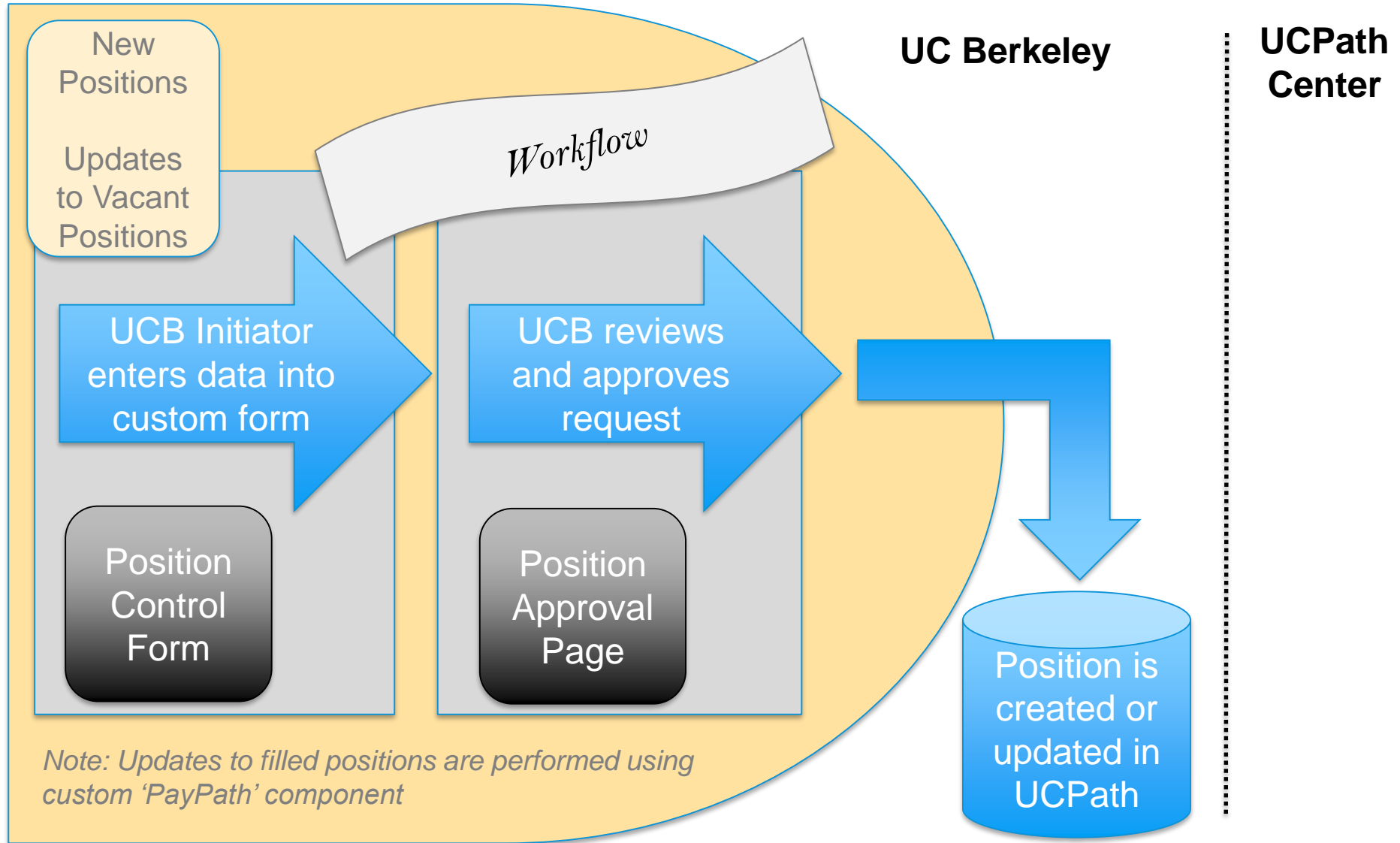
UCPath Center

- Maintains consistency across all UC locations
- Provides technology support and maintenance
- Centralizes certain business processes and functions

Position Management Overview

- A position represents a filled or vacant role in a department
- Examples of Position data include Job Code, Department, Location, Reports To Position, Salary Plan/Grade, Headcount, FTE and ERC
- Employees are hired into positions by using a Position Number to pull Position data into the Smart Hire Template
- Updates to Position data flow into the incumbent's Job record automatically via PayPath
- Funding is linked to Position and set up on the Funding Entry page in Commitment Accounting
- Creation and maintenance of Position Data is a UCB responsibility, with little to no involvement of UCPath Center

Position Management Business Process



Demo Template and Workflow

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

Sample Scenarios – Position Data

Scenario	Pre-work	Initiator	Approver	UCPath Center
Staff Position A		Manager	HR/AP Manager or Admin	N/A
Staff Position B	Manager	HR/AP Manager or Admin	Sr. Manager	
Senate Faculty Position	FTE Call Senate Review	HR/AP Manager or Admin	Central Budget	
Non-senate Position	PI	HR/AP Manager or Admin	Dept. Dean	

How well did we accomplish the desired outcomes?

- ☐ Understand the purpose of the two day **March 13-14 session**.
- ☐ Confirm/**identify SMEs** from your team to participate.
- ☐ **Support participation required** in future deep dive sessions.

UCPath Communication Cheat Sheet



March 2018

For Help with Functional Questions: [UCPath Functional Office Hours](#)

Every Tuesday from 1 – 2PM (PST)
Telephone: [\(669\) 900-6833](#) or [\(877\) 369-0926](#) (Toll Free)
[Meeting ID: 101 157 755](#)

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What You Need to KNOW

1. UC Berkeley is working on configuration templates for conversion: **April 15 2018**
2. UCPath is not just a “technology project” - UC Berkeley will still own most of the business processes that feed into the UCPath workflow, so this is an opportunity to improve some of our processes
3. Starting in March, we will be discussing UC Berkeley’s business processes in preparation for UCPath go-live. The kick-off is scheduled for **March 8th 2018**
4. UC Berkeley website launched. Link <https://ucpath.berkeley.edu/>

What You Need to DO

1. Start talking about UCPath in your staff meetings (if you haven’t already) – use the Communication cheat sheet we will provide each month
2. Help identify SME’s who will participate in 2 day session(March 13th & 14th) followed by deep dive sessions by business area from March 26th to July 27th

What You Need to COMMUNICATE

1. UCPath Go-Live date is currently scheduled for: **March 2019**
2. UCPath is a mandatory change initiative for all UC’s therefore participate in local business process discovery and design sessions to ensure roles and responsibilities are defined and ready for training and testing
3. If you have any questions regarding UCPath please contact us at ucpathtechinfo@lists.berkeley.edu



Questions?