



SHARED SERVICES IMPLEMENTATION KNOWLEDGE TRANSFER

February / March 2017

AGENDA / PURPOSE

Agenda

- FOM
- Guiding Principles
- Change Impacts
- Timeline
- Infographics
- Summary / Next Steps

Meeting Purpose

- High level understanding of FOM (Future Operating Model)
- Review of Infographics
- Next Steps Understanding

FOM | UCPath – What Is It?

All
UC

Technology Implementation: Replacement of 13 UC PPS instances with a single PeopleSoft implementation

Shared Services Implementation: Migration of core Human Resources, Academic Personnel, and Payroll processing to the new UCPath Center

UCR

Business Transformation: Development & implementation of a future operating model (FOM), to deliver high-quality & efficient services for core administrative functions

THE BIG WHY

Our payroll system (PPS) is the same vintage as this vehicle. It might be nice to fix up as a vintage car, but as a computer system? Not so much.....



The system must be replaced as soon as possible

OTHER GOOD REASONS

- Great opportunity to make administrative activities more efficient
- Reports will help us make informed decisions
- Helps us focus on UCR's Core Educational and Research Strategies
- Able to meet compliance requirements
- Prepares UCR for the future

WHAT'S THE CATCH?

- As a UC Centrally controlled initiative, some local flexibility will be lost (e.g. no longer able to issue **'on-the-spot' paychecks**)
- As a pilot campus, **we are leading the way** and will not have the advantage of lessons learned (except for UCOP)
- **Change is hard**, and there will be difficulties during the transition period

PROCESS DESIGN GUIDING PRINCIPLES

Align to Campus Mission

- Teaching, Research, & Public Service Mission Focus
- Universitywide Focus

Engage Diverse Campus Stakeholders

- Faculty Involvement
- Customer Focus
- Communications & Transparency

Use a Disciplined Process

- Implementation & Deployment Focus
- Follow the Rules of Engagement
- Excellent Documentation

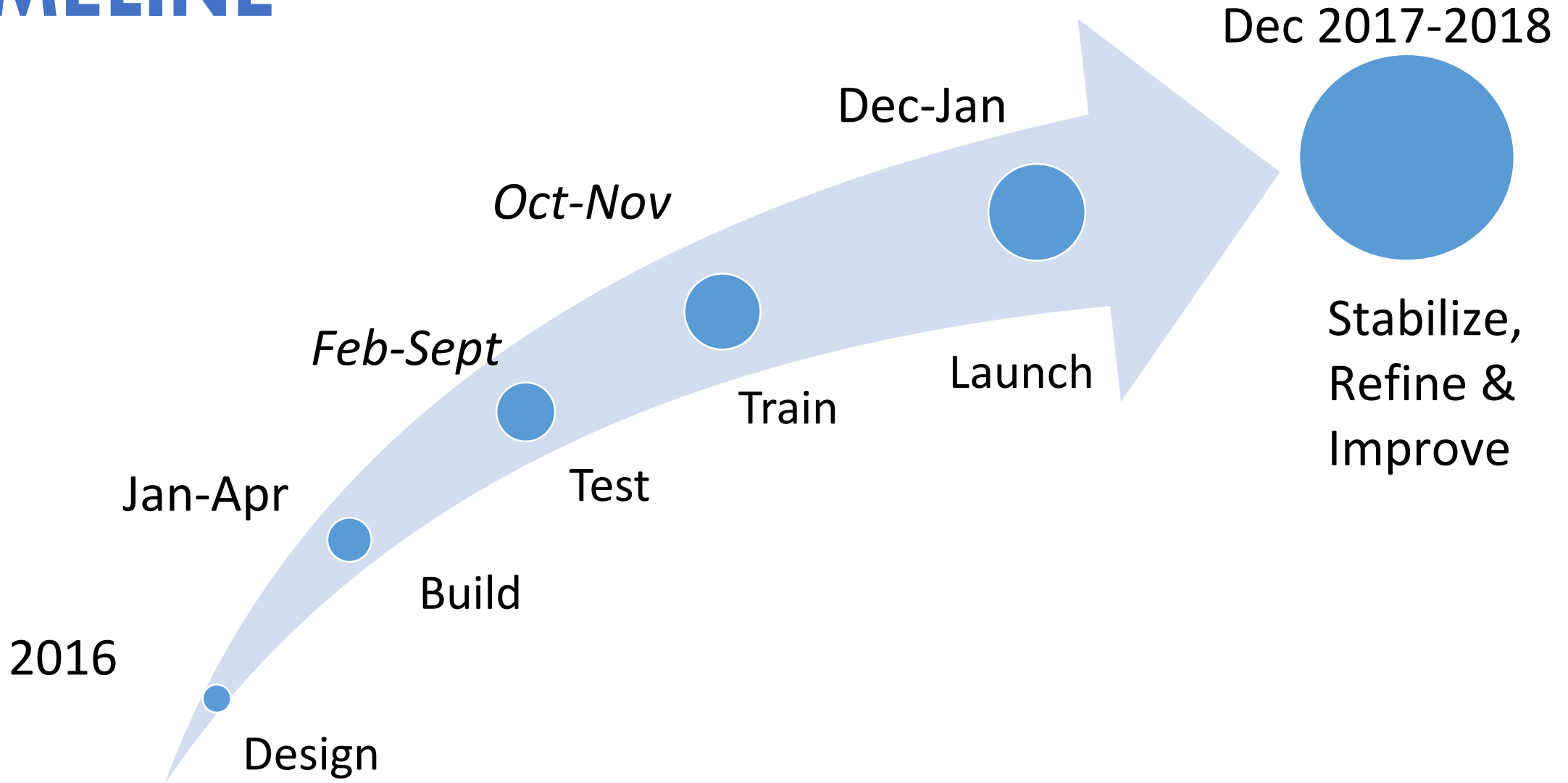
Openness to Change

- No sacred cows
- Open to change & innovation

CAMPUS IMPACTS

- All UCR Employees will be impacted because paychecks will have slight differences
- Employees who are involved with HR/Finance will need to learn new systems and business processes
- All organizational units will be required to use a SSC to conduct payroll and HR related transactions
- UCPath implementation is NOT Optional, it must be done

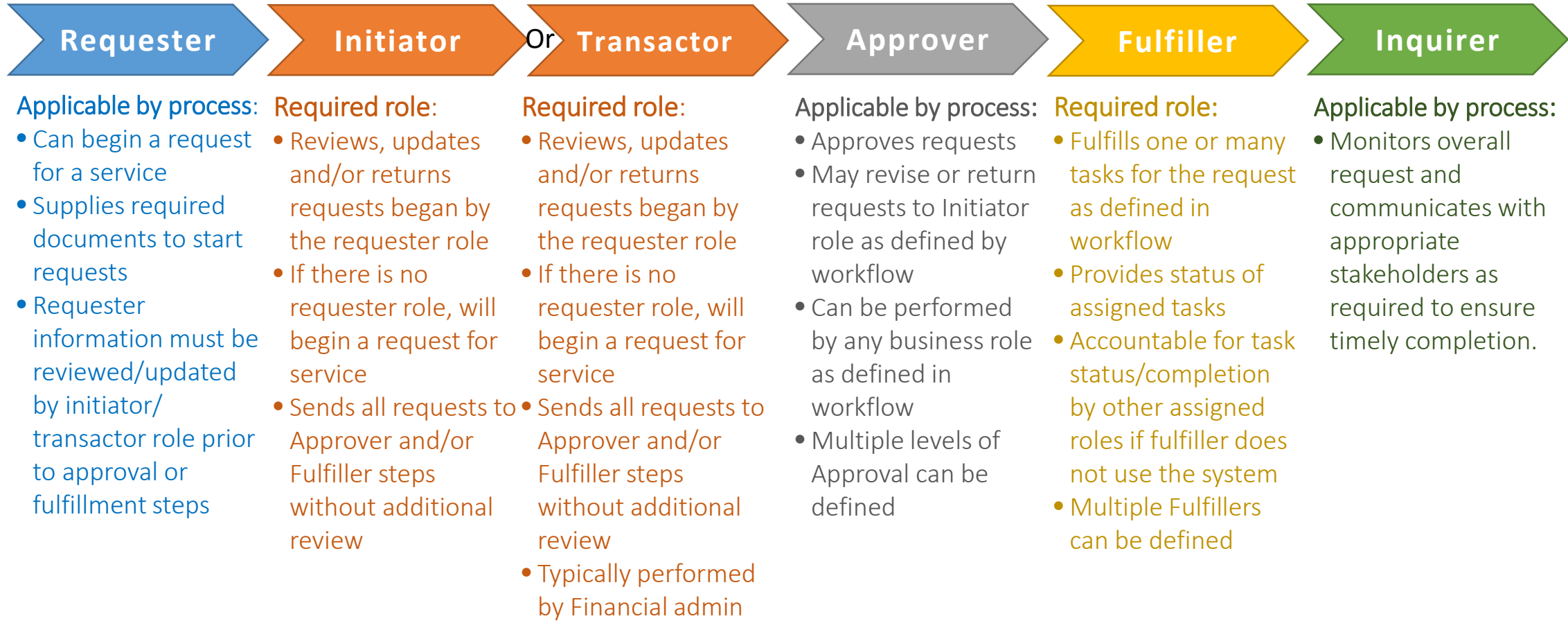
TIMELINE



KNOWLEDGE TRANSFER

NEW WORKFLOW ROLES

Defines level of access and/or actions to be taken within a request workflow. A person may have one or many workflow roles.



INFOGRAPHICS PER PROCESS

- Position Data Management
- Onboarding
- Full Accounting Unit (FAU)
- Salary Cost Transfer (SCT)
- Time & Attendance
- Extended Leave Administration (3 Versions)
- Offboarding

SUMMARY / NEXT STEPS

Summary

- UCPath Implementation will change UCR's business operations
- UCPath is not optional
- UCR is on a short timeframe
- Additional training will be provided

Next Steps

- Infographics and other information will be posted on website (fomucpath.ucr.edu)
- SSCs planning activity will continue
- If you have questions, concerns or comments, please email: FOMUCPath@ucr.edu



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