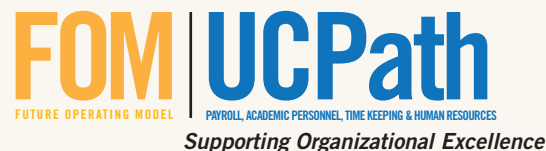


NAVIGATOR

AUGUST 2018

UCR

www.fomucpath.ucr.edu



The Navigator is provided to UCR staff who have operational responsibilities in the areas of Human Resources, Academic Personnel, and Business & Financial Services to convey key information on the UCR FOM|UCPath project implementation.

MESSAGE FROM THE SPONSORS

We are pleased to officially welcome Gerry Bomotti, Chief Financial Officer and Vice Chancellor for Planning and Budget as an Executive Sponsor. Gerry has been involved with the project for several months and will be able to seamlessly integrate into the project. We are confident that under this new leadership, UCR's FOM|UCPath project will continue its trajectory towards stabilization. As many of you may already know, one of our Executive Sponsors, Vice Chancellor Coley, is retiring. We would like to thank Vice Chancellor Coley for his unwavering support and leadership; he will be greatly missed. Please join us in thanking VC Coley for his contributions and welcoming CFO and VC Bomotti to this new position.

The project continues to move forward. Everyone is working very hard and trying to anticipate problems, but as we move through the year, the UCPath Center and staff on campus are faced with new challenges (summer salaries/job end dates/visa end dates/adjustments to salaries/and most importantly other campuses joining UCPath). It is therefore probably prudent for all of us to check our paychecks and deductions from time to time. We previously advised everyone to talk with the payroll person in their unit or shared services if they have a problem, which is still just fine, but some have not received a satisfactory answer when doing so. To counter this problem, academics can email UCPathHelp@ucr.edu, and staff can email fomucpath@ucr.edu with their concerns. Both emails are manned by members of the UCR UCPath team who will look into the issue and check to see whether the problem is a "one off" or needs to be more broadly and proactively addressed. So, please check your paycheck from time to time and put UCPathHelp@ucr.edu or fomucpath@ucr.edu in your address books just in case.

TAM & ePerformance

As part of UCPath, UCR will be implementing two additional PeopleSoft modules – Talent Acquisition Manager (TAM) and ePerformance. The deployment of these modules continues to progress and they are scheduled to go-live in March 2019.

While iRecruit served the campus for many years, TAM will allow for additional functionality and for an on-line end-to-end recruitment and selection process. TAM is a recruiting solution for hiring departments and candidates. It features intuitive, easy-to-use pages for every step in the recruiting process. With on-line screening functionality, recruiters and hiring managers can focus on identifying and hiring talent quickly. Candidates can easily search for jobs, track their applications, interviews, status, and receive and accept on-line offers.

ePerformance will provide UCR with a much-needed on-line tool for performance appraisal and tracking. ePerformance is a web-based performance management solution that streamlines the performance appraisal process, from goal planning and coaching to completing performance evaluations. Managers, employees, and human resources administrators can collaborate on performance evaluations and goals and review performance history. ePerformance will be used for annual appraisals as well as probationary and rehires/recalls.

As TAM and ePerformance are integrated with other PeopleSoft modules, leveraging this functionality will allow UCR to manage two additional components of the employment lifecycle – recruitment and performance management - in one system, providing users with one platform with which to engage.

SERVICELINK

The items listed below are in production and should be live for you to use. Questions can be directed to fomucpath@ucr.edu.

1. SEARCHABLE FIELDS AND DASHBOARD FIELDS – these fields can be added to the Fulfiller or Personal views:

Employee ID, First Name, Last Name, Middle Name, Org, Department Code and Description, Initiator, Shared Services, Transaction Type

This means that you will be able to search and run queries on these fields! Older requests (prior to the implementation of these enhancements) will also populate employee name so that you can filter through closed tickets based on employee name.

To add the new fields to your Fulfiller View, click on the cog wheel icon located in the upper left corner of your content frame. This action will open the Personalized List Column pop-up window.

- a. Select the new fields from the “Available” list and move those you would like to add to your Fulfiller view to the “Selected” column.
- b. Searchable fields under your “Selected” column can be rearranged using the up and down arrows.
- c. Once you are satisfied with the selected fields and their order, click on the “Ok” button.

Clicking the “Ok” button will return you to your Fulfiller view, where you should now be able to see the fields you just added.

Within the Fulfiller view, you can now either run queries or search records based on employee name, department, etc. This should greatly facilitate queue management and reduce the need to keep shadow spreadsheets to track your requests. You can even export the queried data to an Excel spreadsheet by right-clicking anywhere in the list header and selecting your preferred export format.

For additional information on running queries and/or filtering through list records, plan on attending the next offering of UCRSL120: ServiceLink Navigation for Fulfillers or download the course material from the FOMIUCPath website.

2. ONBOARDING – NEW HIRE FORM

- a. Workflow routing changes – simplifying tasks for Departments and Shared Services Centers.
- b. Employee ID – this field is a new field that will appear at the Task level. It is a required field that will need to be updated before SSCs can close out the Task. SSCs can enter “N/A” as they work the tasks and the field will remain in edit mode until the task is closed.

The simplification of the task structure for both Departments and Shared Services Centers should make it easier to manage your task queue. With the redesign, you have the option of selecting a single task or only selecting tasks that apply to the Onboarding in question. This will result in less time wasted managing unnecessary tasks as well as more user control. For additional information on the workflow routing changes and other changes to the Onboarding form suite (including the new Transfer form), plan on attending the new UCRONB201: Advanced FOM ServiceLink Onboarding (v2) training and/or downloading the course material from the FOMIUCPath website.

3. EXTENDED LEAVE ADMINISTRATION

- a. Includes the New Employee Solution as described below.
- b. A bug has been fixed so Initiators are now able to transact on secondary jobs for employees that have two jobs. There is no longer the need to submit a Generic request as employee information will display for their secondary job.

Enhancements to the Extended Leave Administration ServiceLink form strive to increase data transparency and make the process more efficient. With the upgrade, you will be able to see and transact for employees who work in your department, but whose Home department is elsewhere. In addition, instead of pulling up a single row of data (in grid view), the new employee solution enables you to retrieve a combination of position and job data for the employee. Because of the new employee solution, you can filter requests by employee name and department fields in the Fulfiller view of the system, but will also be able to quickly pull up employee data from ServiceLink. Even the employee’s UCR Employee ID will appear in the dataset!

For additional information on the enhanced Extended Leave Administration ServiceLink form, plan on attending the next offering of UCREL211: Advanced FOM ServiceLink Extended Leaves for Academic Personnel (v2) and or UCREL221: Advanced FOM ServiceLink Extended Leaves for Staff (v2). Course material for both trainings will be available shortly for download from the FOMIUCPath website.

4. NEW EMPLOYEE SOLUTION provides the ability to pull the employee ID, first and last name, org and Dept information. It also fixed the issue with the EACS provisioning of secondary job for initiator. Any ServiceLink form that used the grid view to pull up employee records (such as on the Extended Leave Administration, Short Work Break, and Job and Compensation Data Changes forms) will now display employee data using the New Employee Solution. The New Employee Solution displays a combination of position and job data (including the employee’s UCR Employee ID), giving you greater data transparency and enabling you to search ServiceLink requests by employee name, department, etc.

5. ONBOARDING – NEW TRANSFER FORM

- a. Request to Transfer an employee from within UCR or from another campus.
- b. Same workflow and task management as the new Onboarding - New Hire form.

The Onboarding - Transfer form is used to move an employee from one position to another. Note: Reclassifying an employee within the same position is performed via Position Data Management, not through the Onboarding – Transfer form. In addition, if a contingent worker or person of interest is transferring, that must be performed as a new hire. Transaction variants include the following;

- Intra-Location Transfer: Moving an employee to another position within UCR
- Inter-Location Transfer: Moving an employee to another position across two locations, i.e. employee is transferring from UCLA to UCR. If the originating location is not on UCRPath, the two locations will have to coordinate the transfer of employee data.

TRAINING

In an effort to continuously provide accurate and effective training, all process-driven ServiceLink trainings have been updated to reflect upcoming system enhancements. All in-person Advanced ServiceLink training as of July 30 will reflect these changes. There is no need for users who have previously taken ServiceLink training to retake this updated training, although everyone is welcome to attend. The length of courses has also changed, with most courses now being 2 hours instead of 1.5 hours. This is to better accommodate for user questions and to thoroughly cover the material.

Currently scheduled offerings of these courses include:

- **Monday, August 6:** FOM ServiceLink: UCREL221: Advanced FOM ServiceLink Extended Leaves for Staff (v2) (In-Person Training, 2 hrs) from 2PM to 4PM in Hinderaker 0154
- **Wednesday, August 8:** FOM ServiceLink: UCROFB201: Advanced FOM ServiceLink Offboarding (v2) (In-Person Training, 2 hrs) from 10AM to Noon in Hinderaker 0154

NOTE: Please note that these courses are NOT being held in computer labs. Please bring a laptop, if you have one, to follow along with the instructors.

If your Accountability Structure would like additional one-on-one training at your workstation, including UCPath Inquiry training, please contact the FOMIUC-Path Training Team at fomucpathtraining@ucr.edu to schedule a meeting.

If you have any questions or concerns please feel free to contact Kathleen Cool, Principal Trainer at fomucpathtraining@ucr.edu.

POST-DEPLOYMENT FEEDBACK TRENDS

Readiness Network – we want to hear from you! The FOMIUCPath Organizational Change and Communications team would like to schedule a meeting with your department and/or change network team to present a project update and address your questions and concerns. While the team has been in Hypercare mode over the past few months, we have been working diligently to resolve major issues and ensure that all staff is paid accurately and quickly. We are now looking forward to post-deployment activities and need your help to identify issues that still need to be escalated or record enhancements that need to be developed. If your team would like to provide feedback about FOMIUCPath systems and processes, we are here to listen. To schedule a meeting with the OCM-Communications team, please email fomucpath@ucr.edu.

Below are some questions and responses we have received so far. As we identify more answers we will post them to the FAQs page on our website at fomucpath.ucr.edu:

ServiceLink	Required Information	Are there job aids/cheat sheets for department staff that show the exact information needed for submitting a ServiceLink request (i.e. what is needed for Summer Salary)?	Yes, the training team is currently developing some job aids that will fulfill this gap. In addition the ServiceLink enhancements serve to communicate the required information needed.
ServiceLink	Mass Uploads	What is the process for submitting Mass Uploads in ServiceLink (i.e. Short Work Breaks and Returns from Short Work Breaks)?	Short Work Breaks and Returns from Short Work Breaks can be submitted using the Mass Upload process. Here is a guide for completing the Mass Update of PayPath Actions: http://fomucpath.ucr.edu/training/Mass%20Update%20of%20PayPath%20Actions.pdf . <i>Note: Once the file has been completed with the data to be processed in the system, departments must send the template to their applicable SSC for uploading and processing into UCPath.</i>
Shared Services Centers	Processes	Can we ensure that all SSCs use consistent processes and procedures so that the level of confusion and the number of transaction delays are decreased and efficiency is increased?	One of the goals of our four SSC model is to increase consistency related to transaction processing. A governance model will be put into place to enable us to meet this goal.
FOM UCPath	Timeline	How long is stabilization expected to take and what does that entail? Does that include just UCR or the entire UC system?	We estimate stabilization will take 12-18 months. This would be the period of time it would take for UCR to reach stability. Stabilization entails: <ul style="list-style-type: none"> • Ongoing training for department end users to address common data entry topics and to increase understanding of roles and responsibilities • Ongoing knowledge transfer for ERP support staff • Standardizing business practices throughout the organization • Enhancing and correcting system issues not discovered during testing phases • Operational support for the campus at large