
UC FLEX NEWSLETTER

#021 (October 7, 2005)

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Town Hall Meeting #5

The 5th in a series of UC Flex Town Hall Meetings was held in the Tangeman University Center Great Hall on October 5th, 2005. Approximately 190 people from across the University community attended. Speakers included President Zimpher, Executive Sponsors Dale McGirr, Fred Siff and Jim Tucker, and Project Managers Dennis Yockey, Jim Lewis and Danny Trudgett. All expressed their continued support for UC Flex and spoke about the latest developments and major UC Flex activities.

UC Flex Human Resources was the focus of the Town Hall presentation, as the system blueprint design now drives the configuration of the new Human Resources system. The role of the Process Change Leadership Group (PCLG) and Transition Leaders were outlined in some detail, providing a formal structure to facilitate consensus building and the transfer of knowledge about UC Flex Human Resources to end users.

Since implementing the Financials component of UC Flex this past July, the UC Flex Project Team has also been working on activities related to the sustainment of the new Financials system, including the establishment and staffing of the UC Flex Competency Center. The Competency Center will continue to evolve, providing dedicated resources to the task of supporting UC Flex users and being responsive to the needs of the university. Providing UC Flex reports was acknowledged as a work in progress as the university moves towards a paperless model (see the section on UC Flex Reporting later in this newsletter for further information).

If you were unable to attend Town Hall #5, the presentation is available for download from the Home Page of the UC Flex web site at <http://www.uc.edu/ucflex/>.

HR Change Readiness Survey Reminder

A reminder that the deadline for completion of the first Change Readiness Survey for Human Resources has been extended to end-of-day **Tuesday, October 18 2005**. This extension was provided in response to concerns that the original date coincided with the first week of classes and would therefore be an additional burden at this very busy time.



As at October 5, we have only received 116 survey responses (out of a possible 591), yielding a current return rate of less than 20%. The success of the UC Flex Human Resources initiative depends on the ongoing participation and meaningful engagement of the community. If you have received a request to complete the survey, please take the time to do so, using the opportunity to provide any feedback, comments or concerns that you have about the Human Resources initiative.

If you have any questions about the survey or feel that you should have received one but did not, please contact Tom Koerner (x69103) or Dennis Yockey (x65003).

HR Role Mapping Activities Begin

The first component of training development for UC Flex Human Resources – Role Mapping – began in September. Role Mapping is a process by which the UC Flex Training Team, working with the UC Flex Business Process Team, assigns all identified UC Flex transactions for each functional area to UC Flex roles. These roles represent the functions that UC users will be performing in the new UC Flex system. The results of the role mapping process form the basis for security and authorizations in the UC Flex system, and are also used to develop the training curriculum for end users. To date, the UC Flex HR roles and transactions have been identified and a preliminary mapping done. Over the next few weeks, the role mapping exercise will be completed and work will begin on the development of the training curriculum and the identification of training delivery methods.

HR Transition Leader Activities

During September, three separate campus-specific planning workshops were conducted by the UC Flex HR Liaisons with the Transition Leaders. The purpose of these sessions was to determine a regular meeting schedule for each of the three groups of Transition Leaders (East, West and Administrative) and to identify potential challenges and opportunities to effectively helping end users make the transition to UC Flex.



At the end of October, Transition Leaders will attend a HR Process Overview session conducted by the UC Flex HR Team. The purpose of the session is to provide Transition Leaders with an understanding of the UC Flex HR end-to-end processes so that they can begin to prepare users in their area for the changes resulting from the implementation of the new UC Flex Human Resources system.

UC Flex Organizational Management

To meet one of the key objectives of the UC Flex initiative to provide common business processes and data at all levels of the University, the UC Flex team will begin creating a model of the university as part of the implementation of the Organizational Management component of UC Flex HR. Organizational Management provides UC with an opportunity to model the functional organizational structure e.g. department hierarchy, as well as the reporting structure of the University. This component is a critical building block of UC Flex, and the importance of doing it correctly from the very beginning cannot be over-emphasized.

Your support will be critical to its success. We already know that increased standardization will be required to achieve a set of common business processes that can be automated in the SAP system. As an example, the current process for approving personnel actions varies across our campuses. In order to fully enable SAP's automated workflow functionality, we will need to adopt standard business processes for this and other activities.

Over the coming months, the UC Flex team will be working with the university community to create a model of the organization. If called upon to help, please provide assistance and support to them in this critical effort.

Financials System Access

There have been some questions since the Financials Go-Live about how to obtain UC Flex access for a new hire, or how to add or change a role for an existing end-user.

In general, the role-based approval approach for authorizing access has not changed. System access must be assigned by an area Business Administrator (BA) who specifies the user roles for an individual based upon their job requirements. The user roles currently available can be found at

http://www.uc.edu/ucflex/documents/Decentralized_Financials_User_Roles.pdf

To request a new account or to change an existing account, BA's should send an email to ucflex@uc.edu specifying the individual's name and the specific roles that need to be added or removed.

When a request is received, it is reviewed and approved by a UC Flex business process team member. It is then sent to the training team to determine if the user needs to attend any training classes prior to gaining the requested access. Once the required training, if any, is completed, the account is updated or activated with the new role(s). In the near future, a web-based process will be implemented that will facilitate the processing of requests for system access.

Before the Financials Go-Live, area BAs completed a form that listed the roles that were to be assigned to an individual. The roles selected translated into the security rights for the end-user which determined the transactions he/she was able to access. The use of this form is no longer required but it remains a useful way for BA's to indicate the role(s) they wish to add or change to an individual account. Requestors who do not use this form will often specify the system transactions the user needs rather than the role(s) the user needs. This introduces an extra step into the assignment process (i.e. the identification of the appropriate roles to assign to the individual) which slows down the turnaround time for completion of the request. We therefore ask that BAs specify the roles that users need rather than the transactions needed when requesting additions or changes to user accounts.

UC Flex Reporting

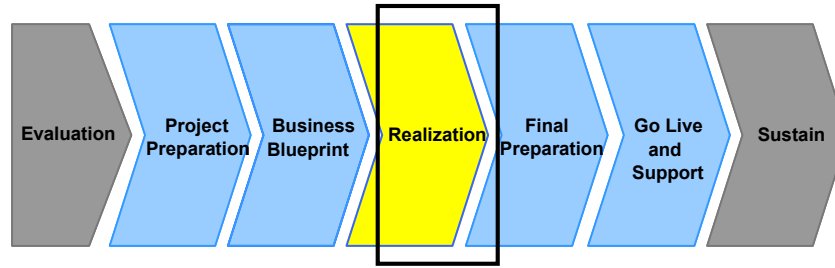
UC Flex brings a new business model for providing reports. Under CUFS, it took considerable time to develop reports, resulting in the regular printing of boxes of paper reports that were prepared centrally to be distributed across all campuses. This model was costly and inefficient and resulted in reports that were out-of-date before they reached their destination.

While the new reporting model is more paperless and provides real-time results, it is still evolving and will take time to reach full functionality. Although access to UC Flex data is an online model; standard reports and robust reporting tools are available which provide the flexibility to access data in almost any way an individual might require. This flexibility was a requirement articulated by the user community.

Additionally, the need to filter the information on reports was expressed as a requirement, in order to provide appropriate control over how financial information is made available. For example, the financial data of one department should only be available to those with the rights to access it. To meet this requirement, a group of super users was created who have been given the access rights as well as the responsibility of filtering reports to be distributed to others. While training in the use of the tools was provided, it will take time for these users to become well versed in the tools and their data.

Consequently, while the phrase "going live" applies to UC Flex reports, please remain assured that the Reporting team is committed to providing the support necessary to successfully implement this new model. In addition to classroom training, the team has conducted road shows, tips sessions, focus group discussions and consultation sessions to both individuals and local work groups. These efforts will continue and more are planned.

September Project Update and What's Coming Next



UC Flex Human Resources is in the Realization Phase

September's **key activities and accomplishments** for the **UC Flex Human Resources** project include:

- Completed baseline configuration
- Reappointments, Promotions and Tenure design meetings held with East and West representatives and a recommended approach developed
- Completed Kronos training with approximately 60% overall attendance (including 31 of 32 Super Users)
- Made progress with Kronos in resolving upgrade problems and planning cutover activities
- Role Mapping strategy and timeline established and initial exercise completed
- Held several HR Transition Leader Management Subcommittee meetings
- Prepared for HR Change Readiness Survey #1

Next steps for the **UC Flex Human Resources** project include:

- Begin work on the final configuration and unit testing
- Finalize Role-Mapping exercise
- Complete HR Change Readiness Survey #1 and Report
- Conduct HR Process Overview Sessions for Transition Leaders
- Begin Organizational Management activities

Note: We will no longer be providing status reports for UC Flex Financials as it is now in sustainment.

Project Contact Information

We welcome your feedback! Questions, concerns and suggestions can be submitted via:

Dennis Yockey, UC Flex Functional Program Manager

E-mail: dennis.yockey@uc.edu

Telephone #: x65003

Jim Lewis, UC Flex Technical Program Manager

E-mail: james.lewis@uc.edu

Telephone #: x69035

UC Flex e-mail account: ucflex@ucmail.uc.edu

[We review this e-mail account regularly]

Additional UC Flex information (including past Newsletters) is currently available on the UC Flex web site located at www.uc.edu/ucflex/. UC employees who do not currently receive this Newsletter and other UC Flex communications directly can sign up by clicking on the following link http://www.uc.edu/ucflex/email_list.asp.

We urge you to stay informed!