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## UC FLEX NEWSLETTER

#023 (December 12, 2005)

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This edition of the newsletter covers the following topics:

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  - ◆ Financials Reporting Tips 'n Tricks
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### Organizational Management Update

During the months of January and February 2006, offices across the University will be completing their organizational charts in UC Flex with the help of the Organizational Management (OM) Team and UC Flex HR Transition Leaders. Over the past few months, the HR OM Team has been working closely with campus offices to capture their organizational structures including organizational units, the names of positions within their organizational units as well as the names of the employees currently holding those positions.

The end result of this effort will be a University-wide organizational chart. This chart will provide the foundation for many features and functions in UC Flex including payroll processing and Manager Self Services (MSS).

The OM Team will hold orientation meetings in early January 2006 for the UC Flex HR Transitions Leaders to provide further guidance on the UC Flex system requirements for an organizational structure. Based on interviews with campus offices, UC Flex has adopted several standards that will provide a comprehensive view of the University. Transition Leaders will be working with the organizational units identified in their areas to help offices configure their organizational charts according to UC Flex standards and to validate the final results. See the chart below for the steps and a timeline for the completion of this effort:



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### HR Training Update

The UC Flex HR Role Mapping exercise is now complete. Working together, the UC Flex Business Process Teams and Training Team have identified the UC Flex Human Resources roles and system transactions, mapped the system transactions to the appropriate UC Flex roles, and designed the UC Flex HR training curriculum. The training curriculum is comprised of 19 courses to date. Development of the curriculum content began in November and will continue through April 2006.


In November a Data Collection form was provided to UC Flex HR Liaisons and Transition Leaders for distribution to their colleges and departments. The purpose of this form is to identify all UC Flex HR users and assign them to the

appropriate UC Flex HR roles. The results of this process will be the basis for assigning security roles to users and developing individual training plans.

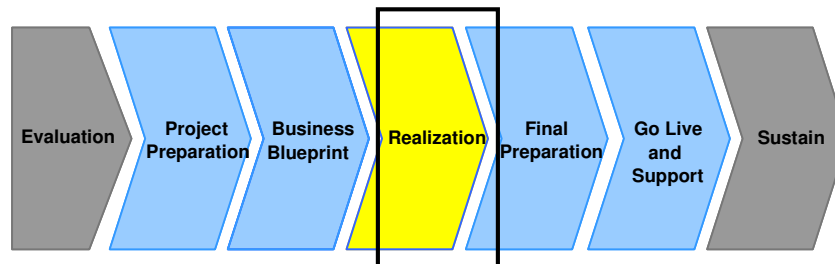
## Financials Reporting Tips ‘n Tricks



Here are some tips and tricks to help you with your UC Flex Financials Reports:

- ▶ To summarize budget supplements, returns and transfers and drill-down to the actual budget documents, use transaction **FMRP\_RW\_BUDGET** in R3. Version “0” is for the current budget. Use version MY to see changes in your General Funds PERM budget.
- ▶ To access your **open POs** by cost centers, use transaction **ME2K**. To further narrow down by fund, use the Dynamic Selection icon  and select Account Assignment in Purchasing Document => Fund. Select the “PO Encumbrances” layout to view your encumbrance detail.
- ▶ To see **open Funds Reservations**, including Travel and Departmental Reservations, use transaction **S\_P99\_41000147**.
- ▶ Did you know that running one of the **FM850-855** Budget to Actual reports in BW is **much faster** than running the **GR55** Budget to Actual real-time report in R/3? While the data in R/3 and BW is the same after month-end close, it takes longer to return a large set of data with an open criteria range in R/3.
- ▶ Need help finding your beginning-of-year balance, revenues, expenses, transfers, and expendable fund balance? Or, your current modified budget, current period expenses, inception-to-date expenses, commitments and available budget for grants and cost shares? Click on the “Reconciliation Reports” link on the BW Home page to find a very useful guide for month-end reconciliation reports.

## November Project Update and What’s Coming Next



*UC Flex Human Resources is in the Realization Phase*

November’s **key activities and accomplishments** for the **UC Flex Human Resources** project include:

- Completed baseline configuration for HR Administration functionality
- Completed the HR Role Mapping process to be used for creating the training curriculum and security roles
- Continued Unit Testing for HR Administration

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

- Complete Unit Testing for HR Administration
- Complete Integration Test Plan for HR Administration
- Complete Blueprint activities for Self Services
- Continue development of Business Process Procedures (BPPs) for Self Services

- Continue Organizational Management activities including working with the Transition Liaisons/Leaders in the validation of the Organizational Model
- Begin Employee Self Service/Manager Self Service development activities.

**Note:** Status reports for UC Flex Financials will no longer be provided as it is now in sustainment.

## Your Questions Answered

**Q:** Will Departments have a comprehensive view of employee data (e.g. name, title, salary, account line distribution) similar to the information currently listed on the PAF?

**A:** Yes. Employees will be able to view all this data however, once the new UC Flex HR system is implemented, you will no longer receive a paper document confirming data changes and displaying comprehensive employee data. Similar to today, in the new UC Flex HR system there will be a decentralized viewer role that will enable online access to the data in UC Flex. The data will continue to be displayed via the appropriate screen e.g. First Name, Last Name, DoB etc, will be displayed on the Personal Data screen; Basic Pay details will be displayed on a separate screen; Position and Department information on another screen and so on.



**Q:** How will Departments know if a student/employee has an appointment in another department (i.e. concurrent employment)?

**A:** In the new UC Flex HR system, the employee record contains an indicator for additional positions. Similar to the current process, this information will be accessible via a “decentral viewer” role.

## Project Contact Information

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

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[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/](http://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](http://www.uc.edu/ucflex/email_list.asp).

We urge you to stay informed!



The entire UC Flex Project Team would like to thank you for your continued support of UC Flex and wish you a safe and joyful holiday season. We look forward to another exciting and successful year in 2006!