

Shared Services Website Audit

Designing a User-Friendly “Front Door” for Shared Services Customers and Staff

Why is an effective shared services website critical to shared services operations?

An easy-to-navigate and informative shared services website serves two important purposes. First, it facilitates the smooth operation of the center by encouraging customers to self-serve where possible, and otherwise directing customers toward a path of quick resolution for more complicated requests. Customers generally expect a high level of accessibility from service providers and may become frustrated if a simple web query does not answer a basic question for them. An effective website is a first line of defense against the skeptical attitudes that some staff may maintain toward shared services.

Second, the website should emphasize the service-oriented, customer-centric mindset of the shared services center. It should present the center’s service philosophy, highlight success stories, and generally make the case for the shared services model. The website sets the tone for how campus will view the shared services center’s professionalism, service ethos, and technical acumen. In other words, thoughtful design of the website should not be an afterthought.

How does this “audit” help me decide what content to feature on my center’s website?

This resource outlines four essential design principles that any shared services center website should follow: establish a service ethos, encourage transparency and communication, facilitate access to self-service resources, and set service expectations. Examples from higher ed shared services websites are provided to demonstrate how organizations have used their websites to achieve these goals. Other website components that provide value or improve the customer experience are highlighted too. Screenshots and links to referenced websites are provided in the appendix (all links and screenshots are current as of September 2019). Read through each component and consider whether your current shared services website meets the bar.

This “audit” contains the following sections for improving shared services website design:

- 1** Four principles of customer-oriented shared services websites, with links and examples (p. 2)
- 2** Compendium of shared services website design components, sourced from real sites (p. 4)
- 3** Appendix of screen-shots from referenced websites (p. 7)

Four Principles of Customer-Oriented Shared Services Websites

Design Choices to Improve Transparency, Communication, and Customer Experience

Goal	Rationale	Sample Components	Example
Establish a Service Ethos	Campus customers will derive many of their first impressions of shared services from its website. Leverage this platform to emphasize the center’s mission, its role in accomplishing the work of the institution, and the service-oriented mindset with which the center staff approach their work.	Reserve space in a prominent place on the website, such as on the landing page or a clearly marked sub-page, to explain what shared services means, whom the center serves, its mission, the organizational structure, and the service philosophy. Consider the following elements: <ul style="list-style-type: none"> • Greeting from the center director • Mission statement • “Who We Are” page • Simplified version of a governing document (e.g., SLA) <i>Optional: Link to performance data page as part of “making the case” for shared services.</i>	University of Washington College of Arts & Sciences Shared Services : “Who We Are” page provides an overview of the shared services center’s history, establishes its mission, and links to other important pages like the membership list and metrics page (p. 7)
Encourage Transparency and Communication	Shared services can seem distant and inaccessible, leading to a breakdown in communication and service. An effective website should establish clear lines of communication, particularly for customers who may need a reminder about whom they should contact if they have questions or need to initiate a transaction.	Shared services centers should establish a clear process to contact either a central point for triaging requests or individual staff members who can answer specialized questions. Include both of the following: <ul style="list-style-type: none"> • Prominent, clearly marked “About Us” or “Contact” page with the street address, phone numbers, and email address of all shared services locations • “Find a Shared Services Staff Member” directory organized by customer unit or staff specialty (large centers may want to consider a searchable staff directory, which can quickly connect customers with the right staff member) 	Cornell University Business Service Center : easily accessible “Contact Us” page with expandable menus for each division of the shared services center (p. 8) University of Kansas Shared Services Centers : searchable staff directory with the units served listed for each employee (p. 9)

See the appendix at the end of this document for screenshots of example websites.

Four Principles of Customer-Oriented Shared Services Websites (cont.)

Design Choices to Improve Transparency, Communication, and Customer Experience

Goal	Rationale	Sample Components	Example
<p>Facilitate Access to Self-Service Resources</p>	<p>Burying important documents on a shared services website (or worse, nowhere on the website at all) will frustrate customers and contribute to a perception of opaqueness and poor service. Overall efficiency will also be sapped if shared services staff must first guide customers to the correct paperwork before completing the requested task.</p>	<p>Push customers to download commonly-used forms and documents directly from the website via a clearly marked page. Examples include:</p> <ul style="list-style-type: none"> • Highlighting the most frequently requested forms in a “Quick Links” section or sidebar • Consolidating all forms onto a dedicated page • Providing links to download forms embedded with the related service offering (e.g., a travel request form alongside the travel and expense services information) <p><i>Optional: Consider offering forms in multiple formats, such as in Word and PDF, to allow customers to choose the one that best suits their needs. As processes evolve, however, these downloadable documents should be replaced with electronic forms.</i></p>	<p>University of Kansas Shared Services Centers: quick links section at the bottom of the homepage directs users to five frequently-used forms (p. 10)</p> <p>University of California Berkeley SHARE Services: Research Administration overview page has provides relevant forms alongside a description of each service (p. 11)</p>
<p>Set Service Expectations Upfront</p>	<p>Unit-based staff are more likely to follow reengineered processes if they can easily determine the owner of each process step and know what to expect in terms of shared services response times. Leave no ambiguity about what services your center offers, and how quickly service will be provided.</p>	<p>List all services provided by the center in as much detail as possible, focusing not just on overall functional areas (e.g., HR), but specific processes and sub-processes (e.g., international visa processing). Examples include:</p> <ul style="list-style-type: none"> • Downloadable menu of service offerings • Multiple pages with service offerings grouped by functional area, units served, or another category 	<p>University of California Davis Human Resources Shared Services Organization: expandable menus, organized by functional area, with a detailed drop-down list of all services offered; clicking on an offered service displays a bulleted description (p. 12)</p>

See the appendix at the end of this document for screenshots of example websites.

Compendium of Shared Services Website Components

Content and Design Choices to Ease Navigation, Promote Further Transparency, or Demonstrate Value

Component	Rationale	Description	Example
Services Organized by Administrative Divisions	For shared services centers with many service offerings, organizing the “menu” of services org by division may make navigation easier. This approach also demonstrates the breadth of tasks covered by shared services, in service to the institution.	Offered services are nested under the administrative division that would ordinarily perform them (e.g., direct deposit services would be listed under an “Accounts Payable” or “Finance” category, and new hire onboarding would be listed under “Human Resources”).	Cornell University Business Service Center : “Transaction Processing” menu at the top of each page expands into a list of related tasks, each of which has its own page with detailed information (p. 13)
Organizational Chart	Organizational charts provide customers with an overview of the center’s operating model, helping them to understand who to reach out to with questions, while also increasing transparency.	The service center’s “About” page or staff directory should contain a link to an organizational chart.	University of California Berkeley SHARE Services : link to the organizational chart at the bottom of the home page (p. 14)
Metrics Page	Sharing performance data serves as an accountability tool for the center, fostering transparency while also (ideally) attesting to the value provided to customers by the center.	Yearly reports or ongoing performance dashboards are published on the website. Notable trends or goals are highlighted.	Southern Methodist University Center for Operational Excellence : tracks key service and financial metrics, presenting them in summary charts with performance goals noted at the bottom (p. 15)

See the appendix at the end of this document for screenshots of example websites.

Compendium of Shared Services Website Components (cont.)

Content and Design Choices to Ease Navigation, Promote Further Transparency, or Demonstrate Value

Component	Rationale	Description	Example
Service Expectations	Customers value transparency and clarity around what to expect once they submit a request. Articulating expectations will keep customers from being dissatisfied due to unreasonable expectations.	Publishing service-level agreements allows customers to quickly consult agreed-upon service expectations. Alternatively, a dashboard-like visualization—either live or representative—shows customers what happens when their request enters the service center’s ticketing system, who will handle it, and how much time it will take at each step.	University of Washington College of Arts & Sciences Shared Services : personal request tracker and a dashboard shows current ticket volume on the sidebar of the homepage (p. 16)
News Update Page or Blog	A newsfeed updates customers on any changes to services provided, noteworthy success stories, and new customer service initiatives.	A regularly updated page with a feed of recent news and events around the shared services center, such as award recipients, new products, changes to services, etc.	Cornell University Business Service Center : news page keeps customers updated with deadlines, training opportunities, and policy changes (p. 17)
Link to Customer Satisfaction Survey or Feedback Portal	A customer-responsive shared services center necessitates a venue for customers to provide feedback, flagging for leaders areas for immediate concern or long-term improvement.	Create a feedback portal or inbox to which customers can submit comments. If a center collects customer satisfaction data, the survey itself can be administered via the website, reinforcing it as the “single source of truth” for everything related to shared services.	University of Washington College of Arts & Sciences Shared Services : link on the homepage to the User Feedback Survey, which can be completed online (p. 18)

See the appendix at the end of this document for screenshots of example websites.

Source: EAB research and analysis.

Compendium of Shared Services Website Components (cont.)

Content and Design Choices to Ease Navigation, Promote Further Transparency, or Demonstrate Value

Component	Rationale	Description	Example
Training Resources	Self-service training modules allow staff and customers to find on-demand solutions and keep workflows moving without waiting for additional support.	Include process guides, how-to videos, and other resources introducing new interfaces and tools.	University of Kansas : process resources page with links to process flowcharts, training videos, and other resources (p. 19)
Process Maps	Resources that clearly articulate the various steps for completing a task enable customers to know their own responsibilities, compared to what the shared services center will provide.	Process maps depict what happens to a customer’s request as it moves through the shared services center, including the timeline, staff involved, and steps in the process. To demonstrate additional value, list the ways the shared services process improves on the previous iteration through increased efficiency, quality, or other benefits.	University of California Riverside UC Path System : infographics map improvements to various processes under the shared services model, including onboarding, time and attendance, and extended leave (p. 20-21)

See the appendix at the end of this document for screenshots of example websites.

Appendix – Screen Shots of Referenced Websites

UW Home / College of Arts & Sciences / Directories / Maps / MyUW

W COLLEGE OF ARTS & SCIENCES SHARED SERVICES
UNIVERSITY of WASHINGTON

HOME SERVICES COMMON LINKS NEWS ABOUT US

! Changes to our HR/Payroll intake form
You will notice some refinements to our Workday intake form, including a drop-down for salaried ASE job titles. Please contact us if you see any problems associated with the changes.

HOME

Who We are

CAS Shared Services (CASSS) launched in June 2011, the result of a grass-roots inquiry into ways to increase efficiency and reduce risk at a time when small departments' staffs were getting ever smaller. Originally designed to complete HR, payroll, and procurement transactions on behalf of 11 Humanities departments, the center experienced rapid growth in its first year and has continued to grow ever since. CASSS now works with 27 units in all four College divisions (Humanities, Arts, Social Sciences, and Natural Sciences). It has been instrumental in the launch of new systems, most notably Workday HR/Payroll in June 2017 and is working closely with the University's Finance Transformation team in preparing College units for the launch of Workday Financials. The goal: To be a prompt, innovative and reliable resource in the College of Arts and Sciences and a trusted partner among the University's central offices.

Check out our [membership and services](#) to see a full list of CASSS member units, along with a detailed view of transaction types. In addition, our "Metrics" page gives a monthly overview of volume and turn-around time by transaction type (queue) and department. If you have any questions, feel free to call the team at 206-221-9266.

REQUEST TRACKER

STAFF DIRECTORY

hssc@uw.edu
Phone: 206-221-9266
Campus Box 353765

Visit the Office

Communications Building -
041A, 041B, 041C

▶ Principle: Establish a Service Ethos

The University of Washington College of Arts & Sciences Shared Services, "Who We Are." Accessed Sep 3, 2019. <https://ssc.artsci.washington.edu/who-we-are>

Appendix – Screen Shots of Referenced Websites



▶ **Principle: Encourage Transparency and Communication**

Cornell University Business Service Center, "Contact Us." Accessed Sep 3, 2019. <https://www.dfa.cornell.edu/ubsc/contactus>

Contact Us

University Business Service Center

341 Pine Tree Rd
Ithaca, NY 14850

Phone: (607) 255-9359
Fax: (607) 255-8258
Email: ubsc@cornell.edu

Click the items below to learn more. | [expand all](#)

🕒 Financial Transaction Representatives (FTR)

Contact	Email	Telephone
Susan Austic	sav10@cornell.edu	(607) 255-0967
Dixie Castrenze	yw22@cornell.edu	(607) 255-7350
Jo Anne Conrad	jmc296@cornell.edu	(607) 255-0644
Lorrie Davis	lrs97@cornell.edu	(607) 255-1667

Source: Cornell University, Ithaca, NY; EAB research and analysis.


Appendix – Screen Shots of Referenced Websites

▶ **Principle: Encourage Transparency and Communication**

University of Kansas Shared Service Centers, "Find SSC Staff." Accessed Sep 3, 2019. <http://ssc.ku.edu/support-staff>

PEOPLE

SHOW STAFF PER PAGE



Support Staff	SSC	Function(s)	Unit(s)
Aaron Weitner aaron.weitner@ku.edu (785) 864-0443	Strong Hall SSC	Financial Analyst	<ul style="list-style-type: none"> • Speech-Language-Hearing • Center for Research Methods & Data Analysis • Applied Behavioral Sciences • Visual Arts • Theater and Dance • School of Public Affairs & Admin • Child Language Program
Aimee Hunt aimeeg@ku.edu (785) 864-5740	Carruth SSC	Finance Manager	<ul style="list-style-type: none"> • Carruth SSC
Alec Schneider Educationssc@ku.edu (785) 864-0060	O'Leary SSC	Accounting Specialist	<ul style="list-style-type: none"> • School of Education - Curriculum & Teaching (C&T) • School of Education -

Appendix – Screen Shots of Referenced Websites



Finances Services
HR Services
Research Services

Forms:

Travel Request
Expense Reimbursement (.pdf)
Candidate & Honorarium Request
Candidate & Honorarium Reimbursement (.xls)
W-9 (.pdf)

▶ **Principle: Facilitate
Access to Self-
Service Resources**

University of Kansas Shared
Service Centers, "Quick
Links." Accessed Sep 3,
2019. <http://ssc.ku.edu/>


Appendix – Screen Shots of Referenced Websites

Proposal Submission Support


As soon as you've identified a project funding opportunity that you want to pursue, you can receive support for proposal development by completing the following webform:

[SHARE Proposal Request Form](#) 

Because the central campus offices require a minimum of 5 business days to review the working draft of your grant application, it is best to notify your research administrator *a minimum of 10 business days before a proposal is due*, in order to provide sufficient time to assemble, organize, and route your application for internal, department-level approvals. More time may be needed if you plan to work with collaborating partners that are external to UC Berkeley.

Upon receipt of a request for proposal support, we will review the proposal submission requirements, establish a timeline to help keep track of the different required components of the application, and assist you with the development of your project budget. Our goal is to review and start the proposal development process within 2 business days of receipt-- please contact share_research@berkeley.edu  if a Research Administrator has not connected with you within 48 hours of your submission of the webform.

Checking Fund Balances

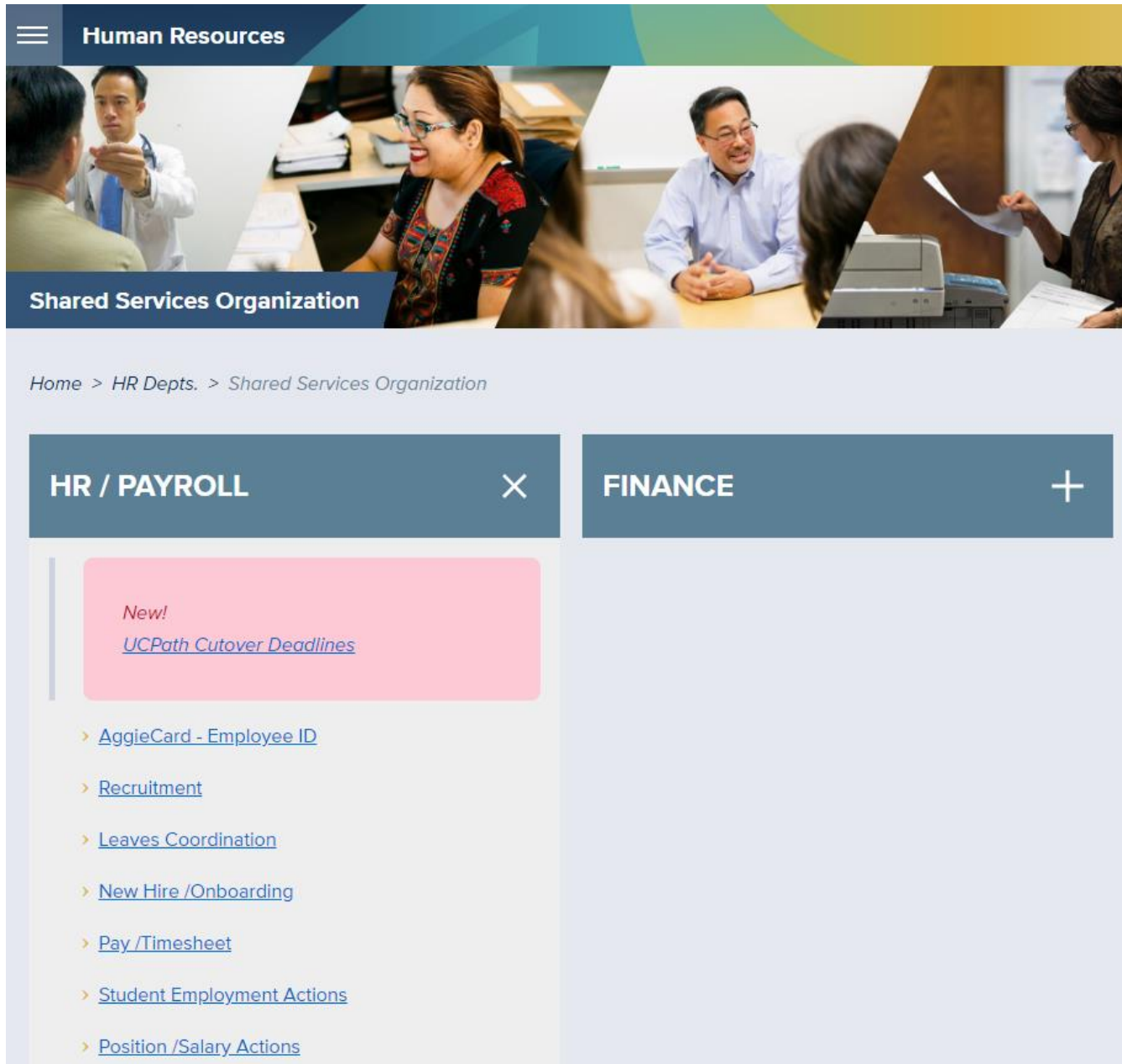
For faculty who have active grants, Research Administrators will provide monthly financial summaries for their activities supported under the SHARE administrative region. Faculty and RA use [CalAnswers' PI Portfolio](#)  as a shared system to review budget, spending, and balances on all faculty-managed funds.

[Log in to PI Portfolio \(direct link\)](#) 

▶ **Principle: Facilitate Access to Self-Service Resources**

UC Berkeley SHARE Regional Services, "Research Administration." Accessed Sep 3, 2019. <https://shareregion.berkeley.edu/regional-services/research-administration>

Appendix – Screen Shots of Referenced Websites



▶ **Principle: Set Service Expectations Upfront**

University of California Davis Human Resources Shared Services Organization, "Home Page." Accessed Sep 3, 2019. <https://hr.ucdavis.edu/departments/shared-services/sso>

Appendix – Screen Shots of Referenced Websites

Pages for: Faculty / Staff

Division of Financial Affairs University Business Service Center

ABOUT | TRANSACTION PROCESSING | FINANCIAL MANAGEMENT | UNITED WAY | CONTACT US

- forms
- CU policies
- training
- KFS Support
- e-SHOP

In this section

- Accounts Payable
- Accounts Receivable**
- Capital Asset Management
- Chart of Accounts
- Financial Systems Access
- Payroll
- Procurement
- Procurement Card
- Student Employment
- Travel
- Year-End Transactions

Accounts Receivable

- Deposit cash and checks and record transactions in the general ledger
- Process student receivables and employee receivables (cash advances)
- Process inter-departmental and inter-unit transactions
- NYS sales tax compliance and review in conjunction with the Division of Financial Affairs

▶ **Component: Services Organized by Administrative Divisions**

Cornell University Business Service Center, "Transaction Processing: Accounts Receivable." Accessed Sep 3, 2019.
<https://www.dfa.cornell.edu/ubsc/transaction/receivable>

Appendix – Screen Shots of Referenced Websites

ABOUT US


Regional Leadership



Teal Sexton
Auffhammer

Max

Regional Director Regional
Associate Dean

 **SHARE Organization Chart**

HOW TO PROVIDE FEEDBACK

We want your feedback!

Please use the SHARE Feedback Form to provide feedback on a transaction, process, system, staff member and/or other aspects of the services provided by SHARE. We are very interested in how we are doing and welcome your ideas for improvement!

[SHARE Feedback Form](#) 

WHERE TO FIND OTHER SERVICES

Looking for other services?

Most other campus services, including Information Technology, are centralized and housed in various departments.

Visit Berkeley Regional Services for information and links to other services.

[Berkeley Regional Services](#) 

Component: Organizational Chart

University of California Berkeley SHARE Regional Services, "Home Page." Accessed Sep 3, 2019. <https://shareregion.berkeley.edu/>

Appendix – Screen Shots of Referenced Websites

SMU World Changers Shaped Here

Navigate Search Social

Purchasing

Office of Budgets and Finance / Purchasing / Metrics

Purchasing Operational Metrics

Metrics Overview

Travel - Concur User Satisfaction

Travel – Operational Metrics

Concur User Satisfaction
Expense Reimbursement Tool

Month	FY2016	FY2017	FY2018	FY2019
Jun	3.1	3.2	3.4	3.2
Jul	3.2	3.4	3.4	3.2
Aug	3.2	3.5	3.9	3.2
Sep	2.8	3.1	3.0	3.2
Oct	2.9	3.2	3.7	3.2
Nov	3.1	3.8	3.5	3.2
Dec	3.1	3.2	3.7	3.2
Jan	3.1	3.4	3.7	3.2
Feb	2.8	3.1	3.1	3.2
Mar	3.4	2.5	3.2	3.2
Apr	3.0	3.5	3.2	3.2
May	2.9	3.1	3.2	3.2

Goal: To achieve a score of 4 or above.

1 *World Changers Shaped Here* **SMU**

Component: Metrics Page

Southern Methodist University
Center of Operational Excellence,
"Metrics: Purchasing." Accessed
Sep 3, 2019.
<https://www.smu.edu/BusinessFinance/OfficeOfBudgetAndFinance/Purchasing/Metrics>

PURCHASING

- About Us
- SMU Amazon Business Account
- Buying Info
- eProcurement
- Forms
- Furniture Purchasing Policy
- Metrics**
- Open Solicitations
- Questions & Instructions
- Preferred & Exclusive Providers
- SMU Card
- Technology Purchases
- Travel
- Vendor Info

Appendix – Screen Shots of Referenced Websites

Purchasing/Paying for Goods and Services

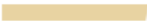
- Purchase Goods** (Items)
New: Submit a Contract for Review
- Pay an Invoice**
- Initiate a Blanket Purchase Order** (BPO)
- "Receive" an Invoice** (BPO)
- Pay an Honorarium** (P2I)
- Bulk Upload for Honorarium Payments**
- Reimburse Travel Expenses**
- Reimburse Purchase Expenses**
- Bulk Upload: Invoice Payments & Reimbursements**
View Invoice Payment Workflow

- Pay an Award or Scholarship** (SDB)
- Bulk Upload: Award or Scholarship Payments** (SDB)

- Request Travel Advance**

Timelines and FAQs

REQUEST TRACKER



Activity Snapshot



Current Ticket Volume

(New and open as of August 12th)

LEARN MORE



STAFF DIRECTORY

hssc@uw.edu
Phone: 206-221-9266
Campus Box 353765

Component: Request Tracker

University of Washington
College of Arts and Sciences
Shared Services, "Home Page." Accessed Sep 3, 2019.
<https://ssc.artsci.washington.edu/>

Appendix – Screen Shots of Referenced Websites



Component: News Update Page or Blog

Cornell University Business Service Center, "USBC News." Accessed Sep 3, 2019. <https://www.dfa.cornell.edu/ubsc/news>

In this section

[Standards](#)

[Roles and Responsibilities](#)

[Events](#)

[News](#)

[Spotlights](#)

UBSC News

[Register now for the Accounting Certificate Program and more finance training courses](#) Aug 27, 2019

New and updated training courses are available, including the Accounting and Procurement certificate programs, starting this fall.

[Learn more about e-SHOP at monthly webinars](#) Aug 26, 2019

Make the most of all that e-SHOP has to offer by attending one of Procurement and Payment Services' monthly Zoom training webinars.

[FY 2019 Year-End Processing Deadlines](#) May 21, 2019

The UBSC has established internal deadlines based on the most recent information from central university offices.

[The IRS has issued standard mileage rates for 2019](#) Jan 09, 2019

The Internal Revenue Service has issued the 2019 optional standard mileage rates used to calculate the deductible costs of operating an automobile for business, charitable, medical or moving purposes.

Appendix – Screen Shots of Referenced Websites

CASSS User Feedback Survey

Log in and this form will be prefilled with your profile data (like email address and default department).

The CASSS team strives to provide timely, accurate service and to be a trusted resource for all our member units. Please complete the following survey so that we can gauge how we are doing and where we can improve. Thank you!

Service Quality

	1 POOR	2 SATISFACTORY	3 GOOD	4 VERY GOOD	5 EXCELLENT
How would you rate the approachability and helpfulness of CASSS team members?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How would you rate the clarity of CASSS verbal communication (phone and in person)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How would you rate CASSS use of Request Tracker (ticketing system)?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How would you rate the turn-around time of CASSS work?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How would you rate the clarity of CASSS written communication?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How would you rate the accuracy of CASSS work?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How would you rate the CASSS web intake forms?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How would you rate your overall experience working with CASSS?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

REQUEST TRACKER

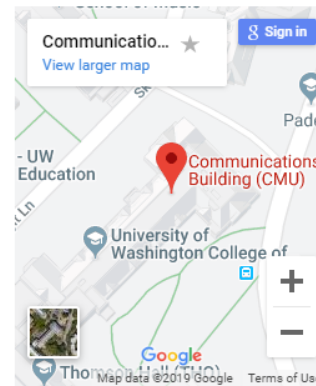
STAFF DIRECTORY

hssc@uw.edu
Phone: 206-221-9266
Campus Box 353765

Visit the Office

Communications Building - 041A, 041B, 041C

Box 353765
University of Washington
Seattle, WA 98195



FIND US

▶ **Component: Link to Customer Satisfaction Survey or Feedback Portal**

University of Washington
College of Arts and Sciences
Shared Services, "CASSS
User Feedback Survey."
Accessed Sep 3, 2019.
<https://ssc.artsci.washington.edu/forms/casss-user-feedback-survey>

Appendix – Screen Shots of Referenced Websites



► **Component: Training Resources**

University of Kansas Shared Service Centers, "Process Resources: Travel and Expense." Accessed Sep 3, 2019. <http://ssc.ku.edu/travel-authorization-and-expense-reimbursement>

Home About Services Contact Your SSC Find SSC Staff **Process Resources** Help

Travel & Expense 3G Training Materials

Travel Authorization and Expense Reimbursement

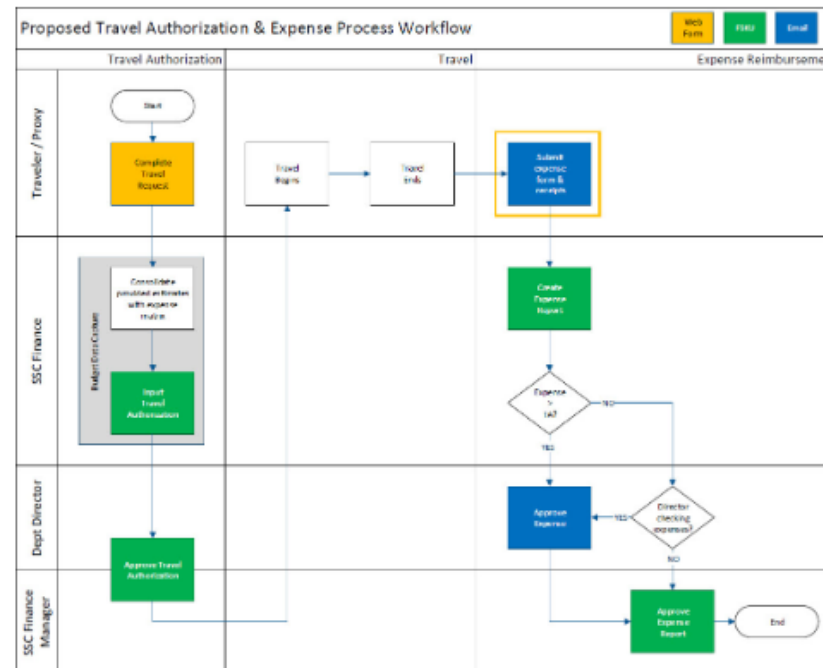
Travel Estimation Video

Travel Request Form Video

Travel Expense Matrix

Travel Resources

TRAVEL AUTHORIZATION AND EXPENSE REIMBURSEMENT



Source: University of Kansas, Lawrence, KS; EAB research and analysis.

Appendix – Screen Shots of Referenced Websites

Navigator Newsletter

UCPath Online Information

Paycheck Information

Permanent Pay Cards

FOM Infographics

Non-FOM Infographics

Component: Process Maps

University of California Riverside
UC Path Campus Support
Center, "Communication."
Accessed Sep 3, 2019.
<https://ucpath.ucr.edu/communication>


A visual guide to the changes occurring in UCR business processes, providing the most basic business case.
Download by clicking on topic below

FOM Processes:


- [Onboarding](#)
- [Offboarding](#)
- [Time & Attendance](#)
- [Salary Cost Transfer](#)
- [FAU](#)
- [Position Data Management](#)
- [Extended Leave](#)

Appendix – Screen Shots of Referenced Websites

POSITION DATA MANAGEMENT



FOM UCPATH
Supporting Organizational Excellence



POSITION + PERSON = JOB





POSITION DATA MANAGEMENT: This UCPATH functionality is required to hire and pay individuals. Position Data Management links FAU, job and person information within the system.*

*FAU change is not identified on this infographic.

CHANGES


- Certain UCR business processes (hiring, reclassification, academic promotions and FAU changes) will now involve a Position Data Management component which must be synchronized across UCR's systems
- Position Data Management will lessen key entry and reduce transactional errors
- Position Data Management allows UCR to establish, manage and change FAUs that are shared by groups of employees

ROLES FOR POSITION DATA MANAGEMENT


 <p>HR/AP STAFF INITIATOR <i>(REQUIRED)</i></p> <p>May initiate request. Reviews requests submitted by Requesters. Accountable for the correctness of the transaction.</p>	 <p>APPROVER - DEPARTMENT <i>(CONDITIONAL)</i></p> <p>Approves FAU changes.</p>	 <p>SSC FILLER <i>(REQUIRED)</i></p> <p>Processes request in UCPATH. Resolves UCPATH errors and communicates with departments on other issues. Marks transaction as complete.</p>	 <p>INQUIRERS <i>(HR/AP STAFF & DEPT./SSC FILLERS) (OPTIONAL)</i></p> <p>Monitors overall request and has the ability to view the status of the request and tasks. May be the same person given the above roles.</p>
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POSITION MANAGEMENT MAP


Roadmap presents the most common business case.




A team is expanding and needs to add an Analyst position.




Supervisor provides Initiator details needed to add new position.




HR/AP STAFF INITIATOR



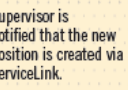
Initiator submits a request for the new Analyst position via ServiceLink.




COMPLETE



Supervisor is notified that the new position is created via ServiceLink.



SSC Filler completes the transaction to UCPATH.



FULLFILLER

Please note, an individual may assume one or many roles.

DID YOU KNOW?

POSITION MANAGEMENT. Separates the concept of a "position" from that of a "job" and a "person in a role." The positions can change over time without necessarily moving the individual people into or out of these positions. Position Management is like an empty chair or box on an org chart that is given certain business attributes. The person who is assigned the chair, inherits those attributes while they are "in the chair."

LEGEND

SSC: Shared Services Center System Actions People Actions PDM: Position Data Management

THE PROCESS IS SUCCESSFUL IF...

✔ Positions are established and persons who are hired can be associated with the position at Onboarding.

Rev. 10/9/17

▶ **Component: Process Maps**

University of California
Riverside UC Path Campus
Support Center, "Position Data
Management Infographic."
Accessed Sep 3, 2019.
<https://ucpath.ucr.edu/document/pminfographicnew109pdf>