

# AP Recruit and UCPath Updates

Department Chair Forum

Wednesday, October 9, 2013

Antonette Toney

Technology & Data Manager, APO



AP Recruit and UCPath Updates

# **AP RECRUIT SYSTEM IMPLEMENTATION**



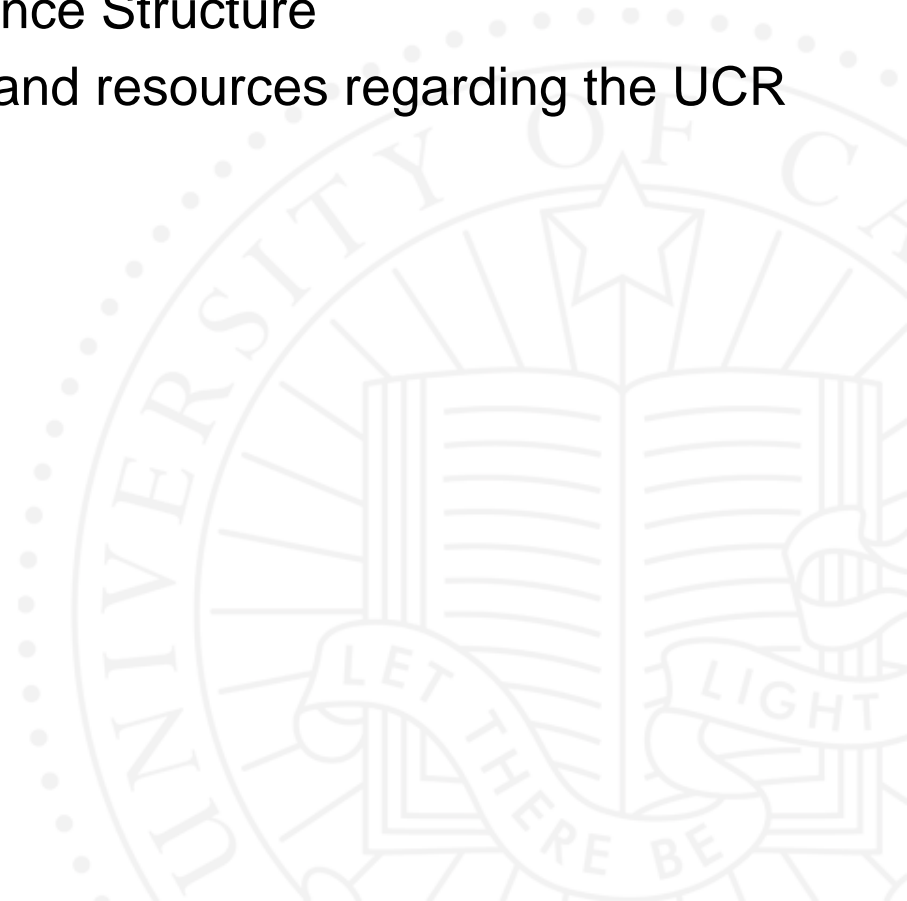
# Goal and Topics

## › Goals

- › To provide background information on AP Recruit
- › Review the AP Recruit Governance Structure
- › Provide AP Recruit information and resources regarding the UCR AP Recruit Deployment Plan

## › Topics

- › UC Recruit History
- › Governance Structure
- › Deployment Plan
- › System Overview
- › Training & System Access
- › Resources



# UC Recruit History

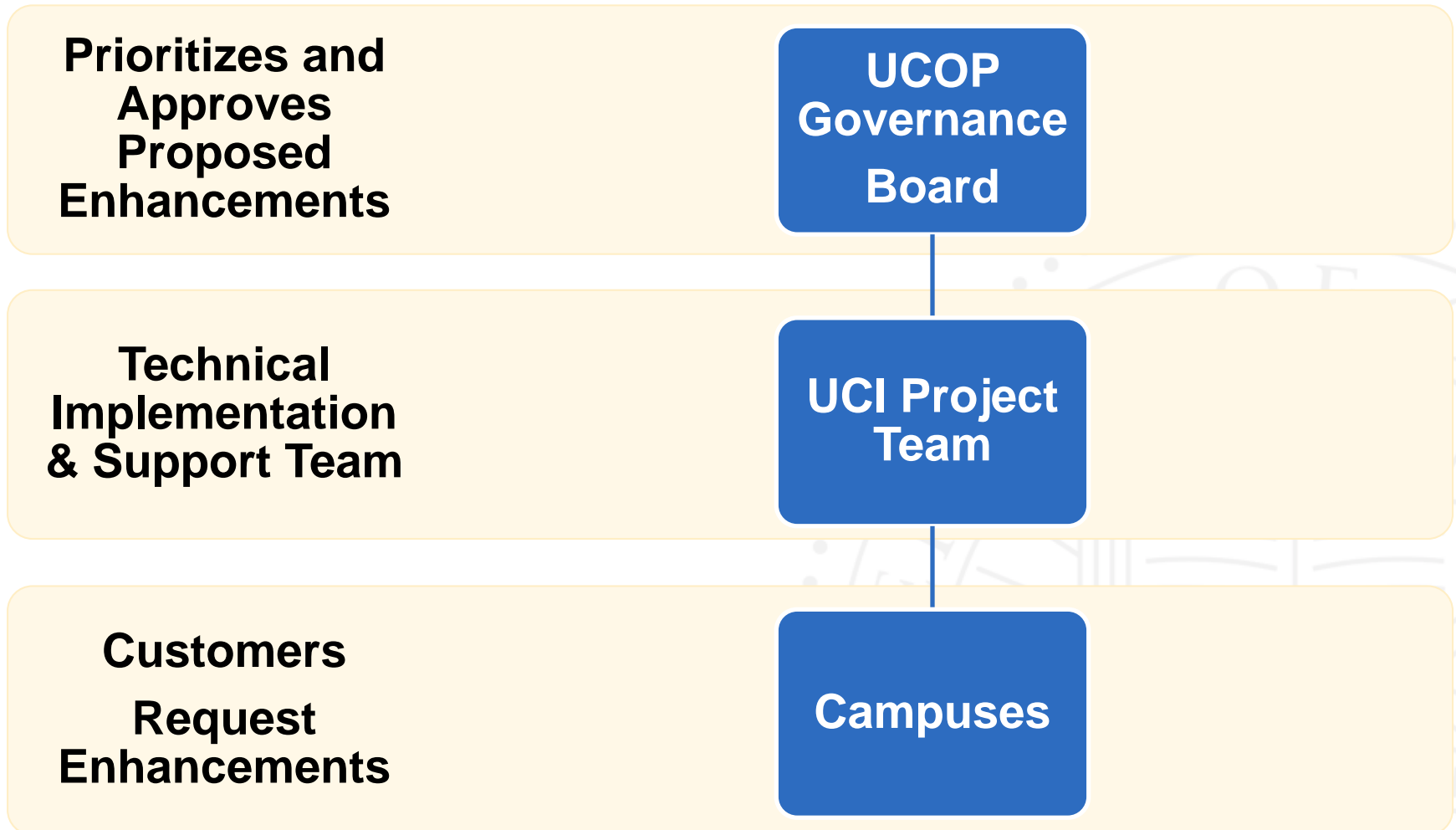
- In 2011, the University of California selected UCI's AP Recruit system—used on that campus since 2006—for system-wide deployment at all 10 UC campuses.
- UC Recruit is a [Working Smarter](#) Initiative.
- Recruit provides for secure online academic employment recruitment management.
- Reports are built-in to the system, providing for an easy way to create the reports that the University of California's Office of the President (UCOP) uses to ensure all campuses meet their requirements as equal opportunity employers.
- Recruit also ensures the security and integrity of all applicant, reference, and related recruitment data.

# UC Recruit History (continued)

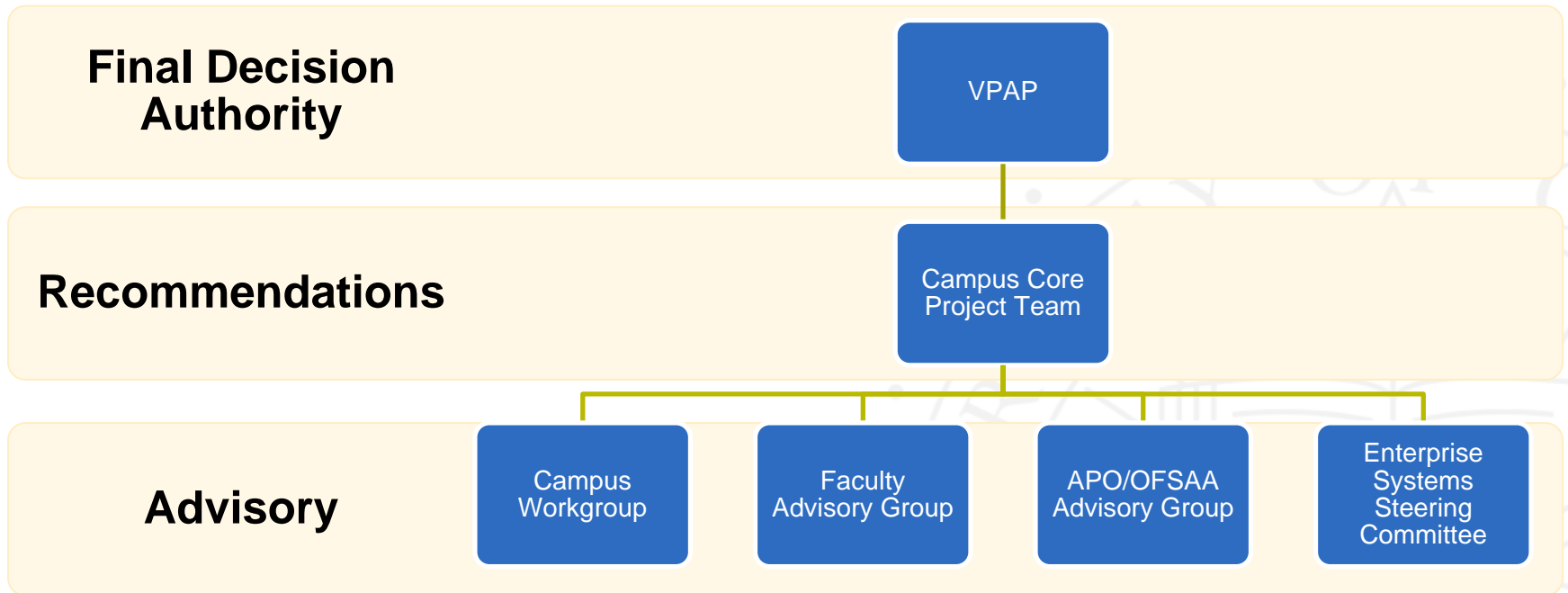
- › All ten campuses are currently live with Recruit:
  - › Irvine (2006)
  - › San Diego (2009)
  - › Berkeley (2012)
  - › Davis (2012)
  - › Santa Cruz (2012)
  - › Los Angeles (2012)
  - › Santa Barbara (2013)
  - › San Francisco (2013)
  - › Merced (2013)
  - › **Riverside (2013)**



# UC Recruit Governance Structure



# UCR AP Recruit Governance Structure



# AP Recruit Core Team & Advisory Members

Core AP Recruit Project Team	AP Recruit Campus Workgroup	Faculty Advisory Group	APO/OFSAA Advisory Group	Enterprise Systems Steering Committee
<ul style="list-style-type: none"> <li>• <b>APO</b> <ul style="list-style-type: none"> <li>• Antonette Toney</li> <li>• Sara Umali</li> </ul> </li>   <li>• <b>C&amp;C</b> <ul style="list-style-type: none"> <li>• Josh Bright</li> <li>• David Gracey</li> </ul> </li>   <li>• <b>OFSAA</b> <ul style="list-style-type: none"> <li>• Erica Jiang</li> <li>• Brittnee Meitzenheimer</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>BCOE</b> <ul style="list-style-type: none"> <li>• Rhonda Peterson</li> </ul> </li> <li>• <b>CHASS</b> <ul style="list-style-type: none"> <li>• Sheryl Eilander</li> </ul> </li> <li>• <b>CNAS</b> <ul style="list-style-type: none"> <li>• Sherice Underwood</li> <li>• Marie Good</li> </ul> </li> <li>• <b>GSOE</b> <ul style="list-style-type: none"> <li>• Janet Harshman</li> </ul> </li> <li>• <b>LIBRARY</b> <ul style="list-style-type: none"> <li>• David Rios</li> <li>• Vicki Austin</li> </ul> </li> <li>• <b>SOBA</b> <ul style="list-style-type: none"> <li>• Leo Gonzalez</li> </ul> </li> <li>• <b>SOM</b> <ul style="list-style-type: none"> <li>• Sheila Morris</li> </ul> </li> <li>• <b>UNEX</b> <ul style="list-style-type: none"> <li>• Yvonne Michel</li> </ul> </li> <li>• <b>VPUE</b> <ul style="list-style-type: none"> <li>• Cheryl Brusuelas</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>BCOE</b> <ul style="list-style-type: none"> <li>• Victor Rodgers</li> </ul> </li>   <li>• <b>CHASS</b> <ul style="list-style-type: none"> <li>• Mary Gauvain</li> </ul> </li>   <li>• <b>CNAS</b> <ul style="list-style-type: none"> <li>• Umar Mohideen</li> </ul> </li>   <li>• <b>SOBA</b> <ul style="list-style-type: none"> <li>• Rami Zwick</li> </ul> </li>   <li>• <b>SOM</b> <ul style="list-style-type: none"> <li>• Ameae Walker</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>APO</b> <ul style="list-style-type: none"> <li>• Katina Napper</li> <li>• Susan Brown</li> </ul> </li>   <li>• <b>OFSAA</b> <ul style="list-style-type: none"> <li>• Gladys Brown</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>C&amp;C</b> <ul style="list-style-type: none"> <li>• Chuck Rowley</li> <li>• Josh Bright</li> <li>• David Gracey</li> </ul> </li>   <li>• <b>FBO/RPB</b> <ul style="list-style-type: none"> <li>• Matt Hull</li> <li>• Georgianne Carlson</li> <li>• Robin Ripley</li> </ul> </li>   <li>• <b>ACCT/PAYROLL</b> <ul style="list-style-type: none"> <li>• Bobbi McCracken</li> <li>• Gabriel Nwandu</li> <li>• Pauline Librenjak</li> </ul> </li>   <li>• <b>APO</b> <ul style="list-style-type: none"> <li>• Katina Napper</li> <li>• Antonette Toney</li> </ul> </li>   <li>• <b>INTERNAL AUDIT</b> <ul style="list-style-type: none"> <li>• Mike Jenson</li> <li>• Toffee Jeturian</li> </ul> </li>   <li>• <b>HR/LABOR RELN</b> <ul style="list-style-type: none"> <li>• Heidi Rhodes</li> <li>• Sue Anderson</li> <li>• Nancy Terry</li> <li>• Jadie Lee</li> </ul> </li> </ul>



# UCR AP Recruit Deployment Plan

- › UCR will conduct a **pilot** deployment of the AP Recruit system for the **2013-2014 Academic Year** beginning in September.
- › The pilot phase will prepare UCR to go live campus-wide with a more robust, fully featured version of the AP Recruit system that will be deployed to all UC campuses beginning in the 2014-2015 Academic year.
- › BCOE, CHASS, CNAS, SOM, SOBA, VPUE, and the University Library will participate in the 2013-2014 Pilot.
- › AP Recruit will be **mandatory** for all academic recruitments beginning in the **2014-2015 AY**.

# UCR Recruitment Process

## UCR Academic Recruitment Process & AP Recruit

### Allocation of Academic Positions

- Off-line process
- Per existing position allocation process

### Recruitment Plan Preparation and Approval

- Off-line process
- Per existing recruitment plan preparation & approval process

### Creation of Recruitments

- AP Recruit
- Includes creation of basic recruitment and online posting of recruitment

### Application and Review

- AP Recruit
- Includes application process, EEO Survey data collection, solicitation of reference letters, review of applications, search committee management, selection of short list and notation of hired applicant.

### Short List Approval

- Off-line process

### Finalizing the Appointment

- Off-line process

### Reporting

- AP Recruit
- Includes Diversity Reports and UCOP Reporting

# AP Recruit System Overview

## System Workflow



# AP Recruit System Overview

## › Roles – Summary of Tasks & Roles

Tasks	UCR AP Recruit Roles								
	Administrator	Central AP Analyst	Diversity Analyst (OFSAA)	Department Analyst	School/Coll ege Analyst	Equity Advisor	Committee Chair	Committee Editor (faculty/staff)	Search Committee Reviewers
Set up new recruitment	✓			✓	✓		✓	✓	
Manage applicants files	✓			✓	✓		✓	✓	
View applicants files	✓	✓	✓	✓	✓	✓	✓	✓	✓**
Manually add an applicant	✓			✓	✓		✓	✓	
Build search committees	✓			✓	✓		✓	✓	
Short-list candidates	✓			✓	✓		✓	✓	
Inactivate (archive) recruitment	✓			✓	✓		✓	✓	
Reactivate recruitment	✓			✓	✓		✓	✓	
Assign, edit & remove user roles	✓			✓*	✓*		✓*	✓*	
Download data fields to generate Compliance Report	✓		✓	✓	✓		✓	✓	
Create Diversity Report	✓		✓			✓			
View Diversity Report	✓	✓	✓			✓			
Download diversity survey responses	✓	✓	✓			✓			
Manage front page news	✓								
Proxy as user	✓								

\* For Search Committee Roles only

\*\* For \*completed\* applications only

# UCR AP Recruit Training

- › AP Recruit Training is *required* for all Pilot AP Recruit Users before access to the system is granted.
- › In Person Training is available for departmental staff
  - › The first round of training took place for nine organizations during the first week of October. Additional training sessions may be scheduled as needed.
- › Online Training is available for Search Committee Members
  - › Online training for Search Committee Members will begin October 15<sup>th</sup>.

# AP Recruit System Access

- › UCR Faculty, Staff and external reviewers who access AP Recruit must have a **UCR NetID**. Users login to AP Recruit using their UCR NetID and password.
  
- › The Recruit Administrator OR the departmental [System Access Administrator](#) (SAA) establishes access to AP Recruit using the (EACS) for the following role after staff have completed AP Recruit Training:
  - › **Recruit Analyst (Department and College/School level access)**
  
- › The Recruit Administrator OR the departmental [Application \(SAA\)](#) establishes access to AP Recruit using the Enterprise Access Control System (EACS) for the following role after staff have completed AP Recruit Training:
  - › **Equity Advisor (College/School level access only)**
  
- › Access to AP Recruit for **Search Committee roles** are granted by the Recruit Department/College Analyst for each Recruitment as appropriate. Please contact your Organization's [AP Recruit Representative](#) regarding access questions for search committee roles.

# Resources

## › Levels of Support

- › **First Level Support:** Departmental Recruit Analyst.
- › **Second Level Support:** College/School/Organizational Recruit Analyst. If the College/School/Organizational Recruit Analyst or cannot resolve an issue, it will be escalated to the APO for resolution.
- › **Third Level Support:** Academic Personnel Office and the UCR Core Project Team Members.

# Resources

## › Online Resources

- › UCR AP Recruit Information Website:

<http://cnc.ucr.edu/aprecruit/>

- › AP Recruit User Guide:

[http://cnc.ucr.edu/aprecruit/ucr\\_aprecruit\\_user\\_guide.pdf](http://cnc.ucr.edu/aprecruit/ucr_aprecruit_user_guide.pdf)

- › Academic Hiring Toolkit:

[http://cnc.ucr.edu/aprecruit/academic\\_hiring\\_toolkit.pdf](http://cnc.ucr.edu/aprecruit/academic_hiring_toolkit.pdf)

- › AP Recruit Production site

<https://aprecruit.ucr.edu/>



# Resources

## › Contact Information

- › College/School/Organization:  
<http://cnc.ucr.edu/aprecruit/contacts.html>
- › Central Academic Personnel Office:  
Antonette Toney and Sara Umali [aprecruit@ucr.edu](mailto:aprecruit@ucr.edu)
- › Office of Faculty and Staff Affirmative Action (OFSAA) Contacts:  
Erica Jiang [erica.jiang@ucr.edu](mailto:erica.jiang@ucr.edu)  
Brittnee Meitzenheimer [brittnee.meitzenheimer@ucr.edu](mailto:brittnee.meitzenheimer@ucr.edu)
- › Technical Contacts: [aprecruit@ucr.edu](mailto:aprecruit@ucr.edu)

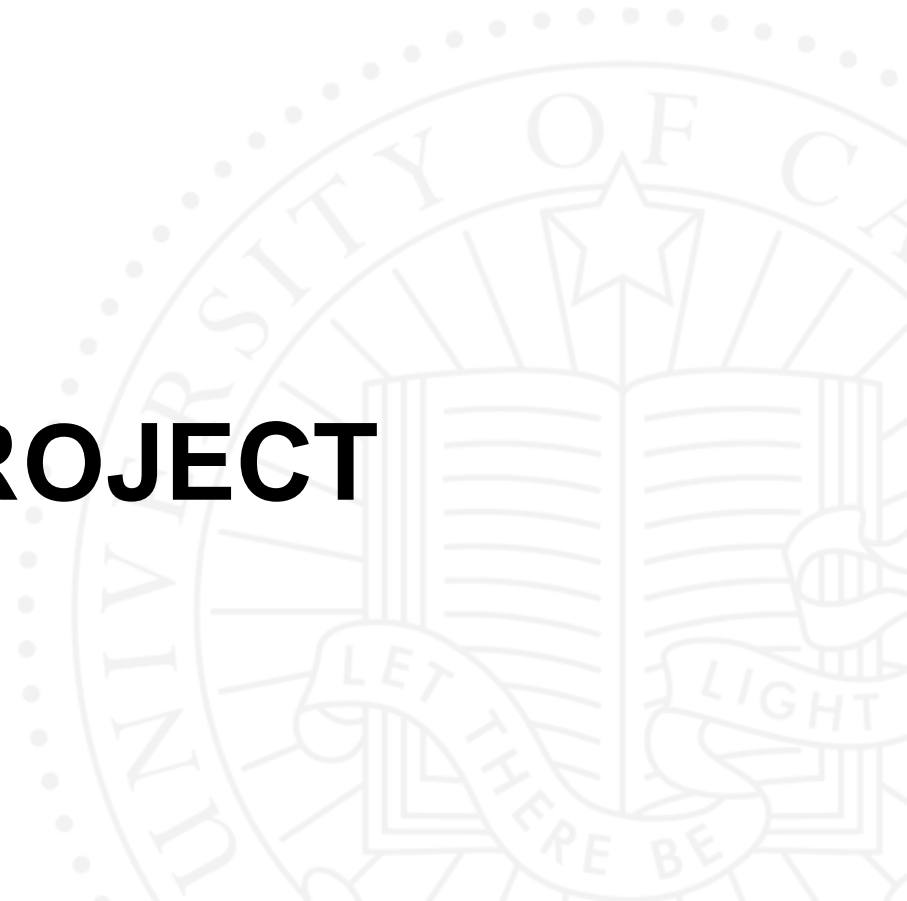
AP Recruit and UCPath Updates

# **APRECRUIT QUESTIONS**



AP Recruit and UCPath Updates

# THE UCPath PROJECT



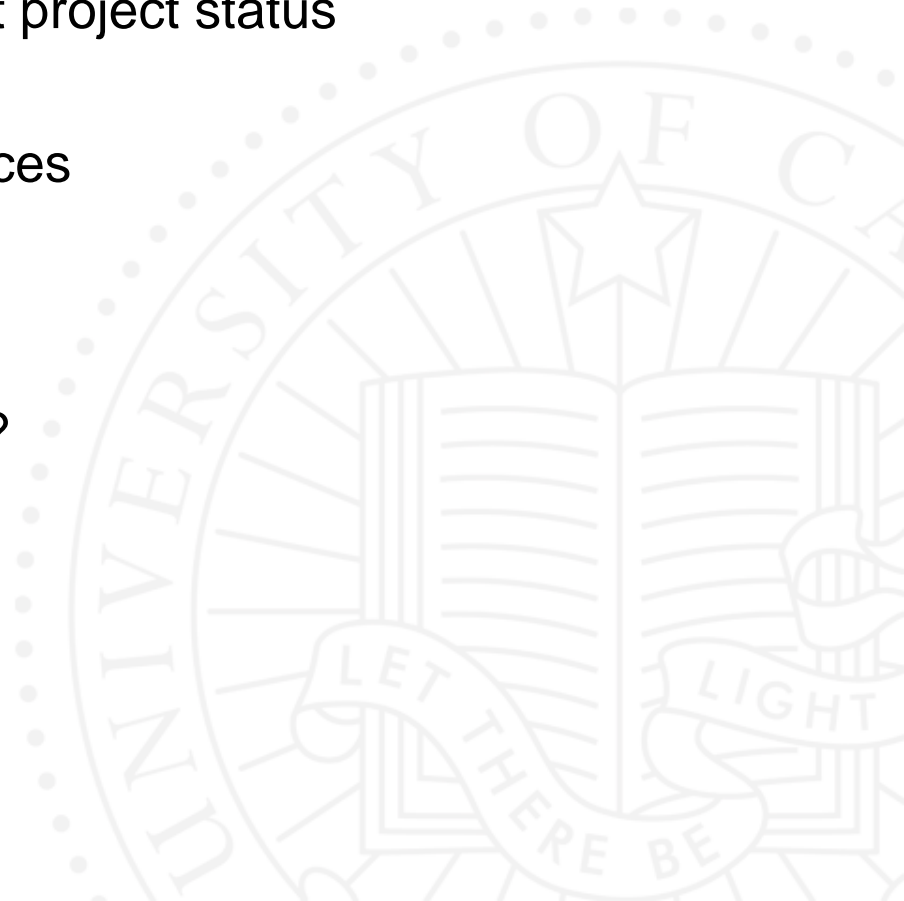
# Goal and Topics

## › Goals

- › To provide a high level overview of the UCPATH Project
- › Provide an update of the current project status
- › Highlight campus efforts to date
- › Provide UCPATH website resources

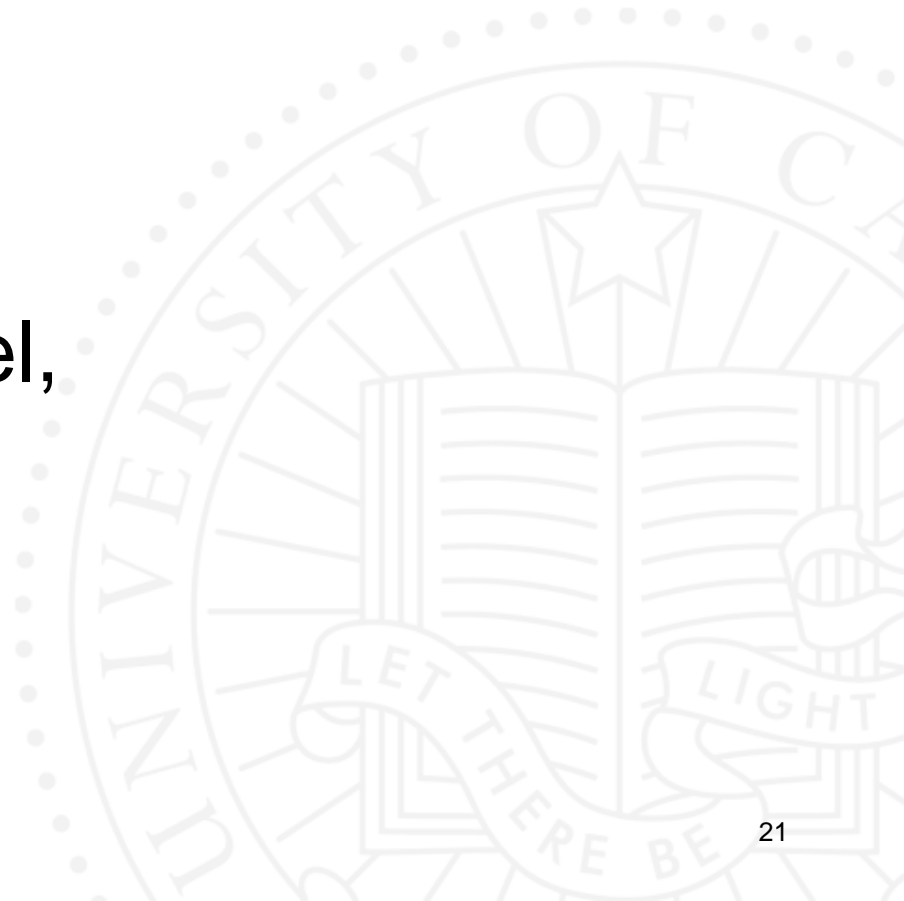
## › Topics

- › What is UCPATH and the UCPC?
- › UCPATH Governance
- › Current Project Status
- › UCR Implementation Team
- › Highlight of Key Campus Efforts
- › Resources



# What is UCPath?

- › UCPath stands for
  - › **U**niversity of
  - › **C**alifornia
  - › **P**ayroll,
  - › **A**cademic Personnel,
  - › **T**imekeeping and
  - › **H**uman Resources

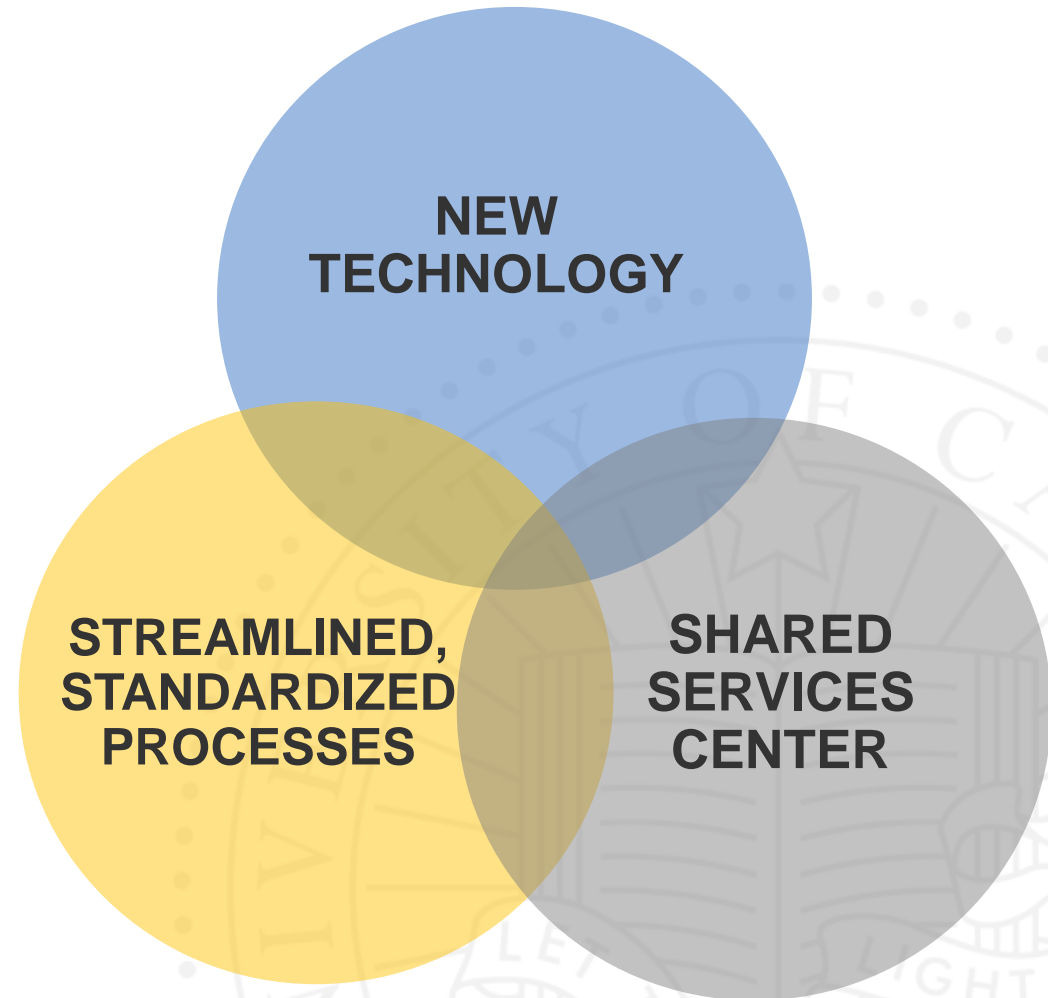


# What is UCPath?

- UCPath is a UC system-wide initiative and is one of the main tenants of the [Working Smarter](#) resolution. It is one of the most complex operational initiatives ever undertaken at the University.
- UCPath involves two distinct efforts:
  - The replacement of the 35 year old Payroll Personnel System (PPS) at all UC locations.
  - The launch of the **UCPath Shared Services Center (UCPC)** which will deliver payroll and human resources services to UC employees.
- The project originally entitled *“the PPS Initiative”*, was commenced 3 years ago.

## What is UCPath?

- Replace PPS with a single new payroll and HR **technology** system
- Standardize and streamline payroll and HR **processes** UC-wide
- Centralize transactional related processes within the UCPath **shared services center**



# What is UCPath?

- › The project is multi-phased. The entire UCPath project will occur over the course of many years with implementation broken into three phases:

## Phase 1

- › Replace All PPS functionality including core HR and Payroll integration with campus general ledgers.
- › Deploy the UCPath Shared Services Center and centralize transactional payroll and HR/APO processes .

## Phase 2

- › Adopt a system-wide time and attendance solution.

## Phase 3

- › Deploy a system-wide human resources/payroll data warehouse supporting analytics and decision support.



# What is UCPath?

- › The project is multi-waved. "Waves" are groups of UC campuses and medical centers.



# What is UCPath?

When Phase I of UCPath is complete the implementation will provide.

## Modern Technology

- A single integrated payroll and HR solution which is automated, efficient and accurate
- Consistent, quality data for reporting and decision-making
- The ability for employees to access and change more information online
- Visibility and tracking of requests and issues

## Consistent Service

- Additional hours of support and staff coverage
- Streamlined processing of routine transactions
- Consistent, trackable, responsive service
- Routine feedback opportunities

## Lower Cost Over Time

- Experience at other institutions has demonstrated that, over time, UC can expect to deliver payroll and HR services at a lower cost.

# UC Path Governance Structure

## Executive Sponsors

Peter Taylor, UC Chief Financial Officer

Nathan Brostrom, UC Executive Vice President

## Executive Steering Team

UC Berkeley	TBD
UC Davis	John Meyer
UC Irvine	Wendell Brase
UCLA	Jack Powazek
UC Merced	Michael Reese
UC Riverside	<b>Bobbi McCracken</b>
UC San Diego	Steve Relyea
UC San Francisco	Barrie Strickland
UC Santa Barbara	Pam Lombardo
UC Santa Cruz	Sarah Latham
UCOP	Susan Carlson
UCOP	Mark Cianca
UCOP	Dwayne Duckett
UCPath Center	Jim Leedy

## Management Workgroup

UCLA (chair)	Allison Baird-James
UC Berkeley	Jeannine Raymond
UC Davis	Mike Allred
UC Davis Medical Center	Steve Chilcott
UC Irvine	Paige Macias
UC Irvine Medical Center	Peter Woon
UCLA	David Curry
UCLA Medical Center	Gwen Lake
UC Merced	Sheryl Ireland
UC Riverside	<b>Chuck Rowley</b>
UC San Diego	Don Larson
UC San Francisco	David Odatto
UC Santa Barbara	Tricia Hiemstra
UC Santa Cruz	Mary Doyle
UCOP	Mike Baptista
UCOP	<b>Nancy Tanaka</b>
UCOP	Paul Weiss
UCOP	Peggy Arrivas
UCPath Center	Jim Leedy

# What is the UCPC?

- › UCPC is the **UCPath** Shared Services **C**enter.
- › The UCPC is located in Riverside and was selected as the city to host the UCPath Center from among 6 campus proposals.
- › Many critical leadership positions at UCPC were filled in early 2013. The majority of employees for Wave 1 will begin in April 2014.
- › By the time the UCPath Center is fully operational, it will employ up to 480 people.



# What is the UCPC?

The UCPath Center will provide

**Routine transaction processing and employee support**

- Payroll (e.g., payroll processing and adjustments)
- Benefits (e.g., open enrollment)
- Finance/GL integration (e.g., validation of FAU combo codes)
- Absence management (e.g., direct billing, leave administration)
- Compensation (e.g., range adjustments)
- Workforce administration (e.g., employment verification, new hires)

Payroll

Benefits

Finance/GL  
Integration

Absence  
Management

Compensation

Workforce  
Administration

# What is the UCPC?

- › Some services will remain on campuses such as:
  - › Employee and labor relations
  - › Talent and performance management
  - › Staffing and recruitment activities
  - › Learning services

# UCPC Governance

## Executive Sponsors

## Executive Steering Team

## Management Workgroup

### Practices Board

<b>UC Berkeley</b>	Jeannine Raymond
<b>UC Berkeley</b>	Delphine Regalia
<b>UC Davis</b>	Mike Allred
<b>UC Irvine</b>	Peter Woon
<b>UCLA</b>	Allison Baird-James
<b>UC Riverside</b>	<b>Sue Anderson</b>
<b>UC San Diego</b>	Don Larsen
<b>UC San Diego</b>	Tom Leet
<b>UC San Francisco</b>	Cynthia Leathers
<b>UC San Francisco</b>	David Odató
<b>UC Santa Barbara</b>	Cindi Doherty
<b>UC Santa Cruz</b>	Pamela Peterson
<b>UCOP</b>	Mike Baptista
<b>UCOP</b>	<b>Nancy Tanaka</b>
<b>UCOP</b>	Karen Ernst
<b>UCOP</b>	Elly Skarakis

### UCPath Center Interim Advisory Board

<b>UC Berkeley</b>	Jeannine Raymond
<b>UC Davis</b>	Karen Hull
<b>UC Irvine</b>	Joan Tenma
<b>UCLA</b>	Lubbe Levin
<b>UCLA</b>	Allison Baird-James
<b>UCLA</b>	Kety Duron
<b>UC Riverside</b>	<b>Sue Anderson</b>
<b>UC San Diego</b>	Kristina Larsen
<b>UC San Diego</b>	Reid Hollyfield
<b>UC San Francisco</b>	Cynthia Leathers
<b>UC Santa Barbara</b>	Tricia Hiemstra
<b>UC Santa Cruz</b>	Pamela Peterson
<b>UCOP</b>	Mike Baptista
<b>UCOP</b>	<b>Nancy Tanaka</b>
<b>UCOP</b>	Peggy Arrivas

# Current Project Status

- **Leadership Change in September 2013**
- The previous UCPATH Program Director, Tony Lo, lead the project for over three years transitioned off the project.
- In early September Mark Cianca and Sabu Varghese assumed day-to-day UCPATH leadership.
  - Mark Cianca is Deputy CIO and has been engaged with the IT component of UCPATH from the project's inception.
  - Sabu Varghese, principal of the BenMar Group has 17 years of experience implementing PeopleSoft in higher education (University of Missouri, Stanford, University of Pittsburgh, etc.) and in large healthcare institutions.



# Current Project Status

- › **Project Health Check underway**
- › The transition in leadership has prompted a project health check.
- › The assessment includes a review of project plans, risks, work products, financials and resources.
- › The process will be complete at the end of October, after which findings and recommendations will be developed.
- › Many of the UCPATH project “workstreams” have been deferred until the Health check is completed.

# UCR UCPath Implementation Team

## Steering Committee

- Chair - VC Finance & Business Operations - Chuck Rowley (interim)
- AVC Financial Services- Bobbi McCracken
- AVC Computing and Communications - Chuck Rowley
- AVP for Academic Personnel - Katina Napper**
- Co AVC for Human Resources – Jadie Lee
- CO AVC for Human Resources – Sue Anderson
- Director, Enterprise Application Development - David Gracey

## Planning and Deployment Team

- Project Manager - Josh Bright
- Project Manager, Financial Services - Alfred Karam
- AVC Financial Services- Bobbi McCracken
- AVC Computing and Communications - Chuck Rowley
- AVP for Academic Personnel - Katina Napper
- AVC Resource Planning and Budget - Matt Hull
- Director, Enterprise Application Development - David Gracey
- CFAO Representative - Georgianne Carlson
- Audit & Advisory Services - Gregory Moore
- Training & Change Management Lead - Sue Anderson
- Communications Lead - Heidie Rhodes
- Subject Matter Expert Academic Personnel - Antonette Toney**
- Subject Matter Expert Accounting G/L - Pauline Librenjak
- Subject Matter Expert Human Resources - Lorena Velasquez
- Subject Matter Expert Payroll - Gabe Nwandu

# Key Campus Efforts to Date

- › Established our local UCPath Project Implementation Team
- › Implemented Biweekly Payroll for non-exempt staff and Readers/Tutors
- › Upgraded the TARS (Time and Attendance System) for integration with UCPath
- › Engaged in Data Cleanup in Preparation for Data Conversion
- › Began Interface design & development
- › Formed the UCPath Campus Structure and Business Process Working Group

# Key Campus Efforts to Date

- UCPATH Campus Structure and Business Process Working Group
- Campus-wide Working Group charged with reviewing UCPATH technical & functional details provided by the UCPATH PMO and making recommendations to the UCR UCPATH implementation team, as well as campus executive leadership, **on how UCR should “do business” in the UCPATH environment.** The Working Group is charged with producing two documents:
  - A set of requirements for campus systems and business processes needed for UCR’s UCPATH implementation, and
  - A set of recommendations for campus leadership regarding the optimal campus organizational structure for the new UCPATH environment.

# UCPath Campus Structure and Business Process Working Group

## Working Group Participants:

- **Charles Rowley**, Interim VC BAS & CIO
- **Bobbi McCracken**, AVC Financial Services
- **Sue Anderson**, Co AVC Human Resources
- **Katina Napper**, AVP Academic Personnel
- **Pat Hartney**, CFAO BCOE
- **Millie Garrison**, CFAO CNAS
- **Nate Jones**, CFAO CHASS
- **Andy Plumley**, AVC Housing Services
- **Antonette Toney**, Technology & Data Manager, APO
- **Cathy Eckman**, Finance & Administration Manager, VCSA
- **Tina Caroline**, Human Resources Manager, Finance and Administration
- **Robin Ripley**, BAS Service Center Director
- **Scheryl Eilander**, Staff Volunteer, , APO (Former CHASS AP Director)
- **Sally Tavizon**, CFAO GSOE
- **Veronica Ruiz**, Financial Operations Manager, Chancellor/EVC
- **Yvonne Michel**, UNEX HR Manager
- **Joann Javier**, CFAO, Undergraduate Education
- **Jocelyn Nakashige**, Senior Associate Dean, School of Medicine

## Support:

- **Gabe Nwandu**, Director of Payroll
- **David Gracey**, UCPATH Technical Lead
- **Josh Bright**, UCPATH Project Manager
- **Alfred Karam**, UCR Accounting Office

# Key Campus Efforts to Date

## › UCPath Structure and Business Process Meetings

- › Over the next two to three months the UCPath Implementation Team will commence with a targeted series of organization-specific meetings to identify key priorities & concerns for the various campus organizations.
- › From these meetings the UCPath implementation team plans to develop a set of guiding principles and key priorities for review by the campus-wide group in December/January, to assist us in moving forward with an appropriate plan for the campus operating environment within UCPath.
- › The completion of this review is timed to align with the completion of current system-wide UCPath project review activities, so that the campus-wide group can benefit from both this local information and clarified guidance from the UCPath PMO.

# INFORMATIONAL WEBSITES

## › UCR Local UCPATH Site

- › This site contains information and updates on the UCPATH project including weekly progress updates and the UC Riverside's implementation status.
- › <http://ucpath.ucr.edu/>

## › UCOP UCPATH Site

- › This is the main site for the UCPATH project
- › <http://ucpath.universityofcalifornia.edu/>

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# UCPATH QUESTIONS

