

# Our Journey To ...



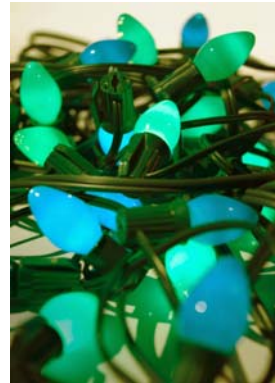
Office of Administration Network Breakfast Presentation  
October 20<sup>th</sup>, 2005

Presented by Maria Ferraro-Potratz and Lia Scott

## Our Original Idea ...



...Soon Expanded



The original idea was to have a site that contained information for orienting new employees - such as how to share your Outlook calendar, how to report leave time, etc.

It soon became clear that even employees who have been here for several years had these questions; so we changed focus to that of providing a central location for information needed by all employees

## What Would It Take?



The significant effort for this project was to gather and/or write the information that would be contained on the site. In some cases we had existing documents we could start with, but formatting and style were often inconsistent (ranging from formal procedures to informational e-mails). In many cases there was no documentation to go by at all. The business office was already undertaking to document those internal procedures that had no documentation.

# The Players



To make this work, we needed people to fill several roles:

- a designer to provide the look & feel as well as the structure of the site
- a content owner to provide the details
- a writer/editor to make the content easily understood, and in some cases to create the content from scratch
- a developer to make the technical side happen

In our case, multiple people served multiple roles in a joint effort between ESS and the Business Office.

## Employees Only Please



The only technical challenge was how to present the information in a way that was easily accessible to employees, but not open for public access. It made the most sense to have the access come from the A&FS home page, since many employees already used the site regularly.

Kerberos login was used to secure the site, with a query against the user's home department code verifying A&FS employees.

## The Pot of Gold ...



(Go live)

# Getting In

The screenshot shows the UC Davis Accounting & Financial Services website. The header includes the UC Davis logo, the text "Accounting & Financial Services", and navigation links for "Home", "FAQ", and "Forms". Contact information for 1441 Research Park Drive is provided. The main content area is divided into several sections: "Our Services" (listing various accounting and financial services), "About A&FS" (with sub-sections for Mission, Organization, Location, and Opportunities), "Training Programs" (listing DaFIS Training, Staff Development Classes, and Class Handouts & Presentations), and "For A&FS Employees" (with a link to the "Internal Web Site"). A "Prompt" dialog box is overlaid on the right side, asking for a Kerberos login. The prompt text reads: "Enter username and password for 'kerberos' at https://secureweb.ucdavis.edu:443". It includes fields for "User Name:" and "Password:", a checkbox for "Use Password Manager to remember this password.", and "OK" and "Cancel" buttons. Two green arrows point from the "Internal Web Site" link in the "For A&FS Employees" section to the "Prompt" dialog box.

From the A&FS main site, a user can click on the link. A prompt will come up asking for Kerberos login (unless already logged in using distauth). Once the user logs in, a check is run on their home department code. If there is not a match with an A&FS code, then the person receives a message stating that they do not have access.

# Success

The screenshot displays the Accounting & Financial Services website. At the top, the title "Accounting & Financial Services" is prominently featured in a blue banner, with "Staff Information and Resources" written below it. A navigation bar contains links for Home, A&FS Web Site, DaFIS, MM Web Site, MyUCDavis, Travel, UC Davis, and VC Admin. The main content area is organized into several sections, each with a list of links. On the right side, there are three distinct boxes with blue headers: "For Supervisors:", "For Managers:", and "Procedures & Forms:", each containing a list of relevant links. A small circular seal is visible on the left side of the page.

**Accounting & Financial Services**  
Staff Information and Resources

Home • A&FS Web Site • DaFIS • MM Web Site • MyUCDavis • Travel • UC Davis • VC Admin

**General Information:**

- Computing Information
- Outlook Instructions
- Personal Information Protection
- Spam Blocking Instructions
- Telephone Information
- Who Do I Ask?

**Facilities Information:**

- Emergency Procedures
- Safety Information
- Parking Information
- University Services Building

**References and Job Aids:**

- Policy and Procedure Manuals
- Chancellor's Chair List
- Campus Directory
- Discoverer Query Tool

**Human Resources/Benefits Information:**

- UCD Human Resources
- Compensation Services
- Employee Benefits
- Diversity Education Program
- Employee & Labor Relations

**Miscellaneous Resources:**

- Reserving Rooms on Campus
- Catering on Campus
- Publishing Resources
- Training Opportunities
- Useful Contacts and Links

**For Supervisors:**

- Employee Appraisal
- Employee Recruitment
- Hiring Resources
- Hiring Temporary Employees
- When an Employee Leaves
- Reclassifying an Employee

**For Managers:**

- Salary Administration Guidelines
- Sr Staff Leave Reporting
- Performance Attributes for Sr Mgrs

**Procedures & Forms:**

- A&FS Departmental Forms
- Expense Reimbursements
- Travel Procedures
- Departmental Parking Permits

Once in the site, employees have access to a range of information from local A&FS procedures to commonly used UC resources.

# The Hard Stuff

## Accounting & Financial Services Staff Information and Resources

[Home](#) • [A&FS Web Site](#) • [DaFIS](#) • [MM Web Site](#) • [MyUCDavis](#) • [Travel](#) • [UC Davis](#) • [VC Admin](#)

### Reclassifying an Employee

#### I. Purpose

- a. This section describes departmental policies and procedures regarding the review and updating of position descriptions (PDs).

#### II. Policy

- a. It is A&FS policy that PDs are to be reviewed annually.
- b. It is further A&FS policy that either the employee or the supervisor may initiate a PD update at any point that the PD is found to be out of date.

#### III. Procedures and Checklists

- a. Annual PD Review

Supervisor and Employee Action Items	
Done	Action Item
	Collaborate to review and update the PD annually
	If the PD is found to be current, employee and supervisor initial and date the PD to acknowledge review. **Check the update box at top left corner.
Supervisor Action Item	
	Provide employee with a copy of the PD, retain one and submit the original initialed and dated PD to HR Compensation with a copy to the A&FS Business Office (ABO)

- b. Periodic PD Review for Proper Classification:

There are departmental policy and procedures to clarify practices within A&FS that were often sources of confusion or inconsistency.

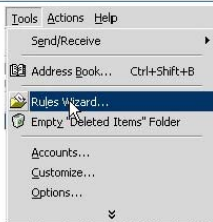
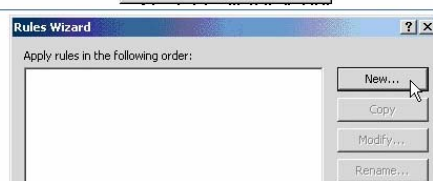
# The Little Stuff

## Accounting & Financial Services Staff Information and Resources

[Home](#) • [A&FS Web Site](#) • [DaFIS](#) • [MM Web Site](#) • [MyUCDavis](#) • [Travel](#) • [UC Davis](#) • [VC Admin](#)

### Filtering Spam

Below are instructions for creating a rule in Outlook that should filter a significant amount of the spam you may be receiving. If you need assistance, please contact [achelp@ucdavis.edu](mailto:achelp@ucdavis.edu).

<b>1</b> Open Outlook; click <b>Tools</b> on the menu bar and click <b>Rules Wizard</b> .	
<b>2</b> Click <b>New</b> .	

We provided instructions for those little daily things that just keep coming up as questions. It saves the technical support, business office, and other staff from having to repeatedly answer the same questions. It also allows staff to help themselves with the simple things they "feel stupid" about asking.

# Who Ya Gonna Call?

## Accounting & Financial Services Staff Information and Resources

[Home](#) • [A&FS Web Site](#) • [DaFIS](#) • [MM Web Site](#) • [MyUCDavis](#) • [Travel](#) • [UC Davis](#) • [VC Admin](#)

### Who Do I Ask?

Not sure who fixes what? Where do you go if the sink is clogged? Your computer is on fire? The following list should help.

- Building Issues: e-mail [A&FS Building Services](#)
- Computer or Printer Issues: e-mail [A&FS Computer Tech Support](#)
- Need Supplies? E-mail [A&FS Supply Requests](#)
- General, non-confidential requests: e-mail [A&FS Business Office](#)



This site maintained by [UC Davis Accounting & Financial Services](#) for internal use.

When all else fails and the answers aren't found on the site, they know who to contact. This page was a direct result of suggestions provided by staff using the site. It will continue to expand as we get further suggestions.

# The Fun Stuff

**Accounting & Financial Services**  
Staff Information and Resources

[Home](#) • [A&FS Web Site](#) • [DaFIS](#) • [MM Web Site](#) • [MyUCDavis](#) • [Travel](#) • [UC Davis](#) • [VC Admin](#)

## Useful Contacts and Links

Important Contacts		
<a href="#">UCD Police</a>	<a href="#">Employee Health Services</a>	<a href="#">UCD Campus Directory</a>
<a href="#">UCD Fire Department</a>	<a href="#">Environmental Health &amp; Safety</a>	

UCD Staff Resources	
<a href="#">Academic &amp; Staff Assistance Program</a>	<a href="#">Parking Permit Sales Online</a>
<a href="#">Administrative Departments</a>	<a href="#">Policy &amp; Procedure Manuals</a>
<a href="#">Business Contracts</a>	<a href="#">Publication Standards</a>
<a href="#">Calendars - Academic and Administrative</a>	<a href="#">Resource Planning and Management</a>
<a href="#">Campus Events &amp; Visitor Services</a>	<a href="#">Staff Assembly</a>
<a href="#">Campus Unions</a>	<a href="#">Telephone Directory Updates</a>
<a href="#">Catering</a>	<a href="#">Temporary Employment Services</a>
<a href="#">Central Storehouse</a>	<a href="#">Transportation and Parking Services</a>
<a href="#">Ergonomic Information</a>	<a href="#">Unplugged</a>
<a href="#">Facilities Services</a>	<a href="#">Vice Chancellor Administration</a>
<a href="#">Internal Audit</a>	

Recreation and Leisure	
<a href="#">Balancing Work and Life</a>	<a href="#">Picnic Day</a>
<a href="#">Bookstore</a>	<a href="#">Recreation Hall</a>
<a href="#">Campus Recreation Program</a>	<a href="#">Silo Cafe &amp; Pub</a>
<a href="#">Coffee House</a>	<a href="#">UC Davis Presents</a>
<a href="#">News and Communications</a>	<a href="#">University Library</a>

There are also resources from across campus that are commonly used by A&FS employees in their jobs (References & Job Aids), are staff resources (HR & Benefits), or just provide campus and community information (Useful Contacts & Links)

## Potholes & Roadblocks



One of our original intents was to also use the site for posting "happenings" within A&FS - such as birthday parties, showers, retirement parties, and the like. However, in discussions with HR we realized that there would be issues we didn't anticipate, such as union access. Did policies requiring access for posting union notices apply to an online environment? Where do we draw lines that distinguished between "official" A&FS sponsored events and unofficial events? We ended up tabling that part of the site until we could further explore these issues.

## It Takes Standards ...



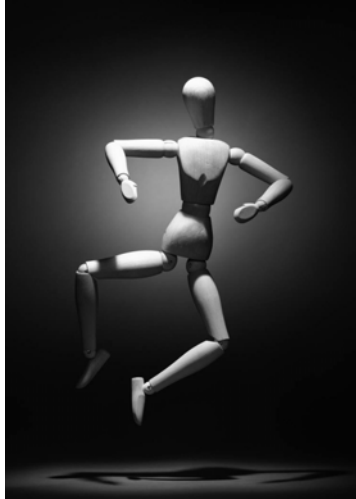
## ... And Goals



Aside from visual standards for presenting information, you need to have standards on content as well. For example, we list titles/positions in our instructions, rather than names. That way we don't have the issue of information being outdated as soon as someone leaves. We also try to have contact information go to a list or central phone number, rather than an individual.

One of the biggest obstacles to getting this site rolled out was in deciding when it was "done." It is easy to get caught up in ever expanding ideas of what the site should be, and never reach a point at which you feel it is ready for use. Informational web sites are ever-growing entities - as need for new information appears, it should be added to the site. However, you have to define a core content that you are willing to start with. We did not set this minimum standard, so it was difficult to get everyone to agree when the site was ready for rollout.

## So What Do They Think?



The site officially rolled out on June 29th. We immediately received positive feedback from staff across A&FS, as well as suggestions for additions to the site. Staff continue to use the site and provide feedback; the largest adoption rate to date seems to be among managers and supervisors.

## Keeping it Going



As with any web site, it's only as good as what you continue to put into it. Maintenance of the content is always a challenge. We have owners of some content, such as tech support and business office, and they will provide updates to the web team as needed. We also rely on users to let us know when something appears to be out of date. We will be trying to develop a more formal process for updating.

## What's in the Future?



Our next target for the site is to filter out information based upon whether the user is Materiel Management. They have internal committees for which they post minutes and other content. Other plans include a “New Employee Orientation” section that would be by division – offering information on such things as requesting vacation, that are specific to a division.