

**August 2001
HRIS Follow-up Task Report**

Return completed document to Judy.Thai@ucop.edu by August 30, 2001

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| ITEM #: 20 | Generate tickler or action notices based on user defined criteria |
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| Team #: 4 | Reported by: Cynthia Seneriz |
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| <p>Definition Statement: (1-10, 3-16, 5-9, 15-3) Based on user-defined criteria, specific events or transactions in PPS would generate an electronic notice to the appropriate individual to review, take action, etc.</p> <p>Some examples of specific events that would generate a notice to a designated individual: End of probationary period; Upcoming review date and status; Vacant position; Change in employee's FTE in PPS; Reclassification of a position; Change to an employee's title code; and Placement of an employee on leave in PPS.</p> |
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| Re-engineering Required? Y/N: Changes in departmental/control unit workflow and approval process may be required as a result of the on-line notifications. |
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| Size/Scope (person months) | Small < 1 month | Medium 1-3 months | Large 3-6 months | Extra Large > 6 months | Super Size > 1 Year |
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| Requirements Definition & Development | | | X | | |
| Programming | | X | | | |
| Campus Implementation | | | X | | |

Comments/Risk Factors:

It appears that existing PAN programs could be enhanced to identify additional selection criteria that would generate electronic notifications to designated individuals. Programming limitations within the PAN programs may exist but are not known at this time.

Enhancements to the PAN programs would require identification and agreement on the selection criteria and the information included in the notification. Campuses would be responsible for updating and maintaining the PAN reviewers for the different types of notifications. The bundling of notifications or other methods of organization would also be reviewed by the “development team” to provide logic in the transmittal and receipt of the notifications.

It is difficult to estimate the size of such a project. Considerable effort will be required to identify, select, organize, and agree upon all of the new criteria that would generate the notifications. The information (or action necessary) for each type of notification would also require identification and agreement. Electronic notifications could replace hard copy documents in some cases. Workflow process changes might also be required at the department/control unit levels that could add complexity to the campus implementation phase.

Programming Assumptions:

If the existing PAN programs require only enhancements to add the new criteria, programming time could be medium. PANs may need to be generated by batch processes such as monthly and nightly maintenance and nightly IVR/UCForYourself updates.