

Position Description

| Position Description | |
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| JOB ID: | 9571 |
| Position Number: | 02013841 |
| UC Path Position # | 40236746 |
| Dept: | VP - INFO & EDUCATIONAL TECH - 061425 |
| Position: | Business Assistant |
| Approved Payroll Title Code: | 4722 |
| Approved Payroll Title: | _____ ASSISTANT III |
| Approved MSP Salary Grade: | |
| Approved PSS Salary Grade: | 0 |
| POSITION DETAILS | |
| Job Summary: | <p>Under the general supervision of the Information and Educational Technology (IET) Business Supervisor, independently provide business support to IET departments. Ensure financial transactions such as purchasing, travel, and accounts payable, and billing are compliant with applicable campus and division-wide policies. Monitor the financial process for accurate, timely and efficient execution. Use University resources such as Purchasing Card, Travel and Entertainment Card, AggieBuy, AggieShipping to facilitate rush requests. Manage physical and electronic documentation, and record requests and issues in the ServiceNow Business Management ticketing system.</p> <p>This position serves as a liaison between IET and various campus entities [e.g. Shared Services Organization (SSO), Central A/P, Travel, etc.) to process financial transactions, assist on issue escalation and resolution, and provide business services.</p> |
| Campus Job Scope: | |
| Department Specific Job Scope: | <p>This position is in the Business Unit (BU) of the Business and Finance team within IET Operations, the administrative arm of IET. The BU provides a wide range of business services including accounting, facilities management, equipment management, safety services and billing. IET has an operating budget of over \$60M annually and has a throughput of material expenses, including pass-thru costs for other campus departments. This is one of multiple positions providing business services in a distributed environment.</p> <p>The mission of Information and Educational Technology (IET) is to create and support an information and technology environment that enhances the ability of the UC Davis community to teach, do research, and provide public service. In support of the University's mission, IET delivers an infrastructure of technology services appropriate to the requirements of the campus community.</p> |
| Positions Supervised: | N/A |

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| <p>Essential Responsibilities:</p> | <p>50% FINANCIAL SUPPORT, POLICY, AND PROCESS COORDINATION Review and approve financial transactions for completeness, accuracy, and compliance with University and IET policy/best practice. Work within the ServiceNow Business Management system to resolve issues that impede the progress of transactions.</p> <p>Complete regular billing entries in to IET billing systems. Review billing entry and ensure accurate recharging of customers. Perform close activities in billing systems as required by IET billing systems.</p> <p>Serve as a liaison between IET staff, IET management, and SSO staff. Serve as a liaison between IET staff and vendors.</p> <p>Receive inquiries in to the ServiceNow Business Management system from IET staff and managers on policies and procedures, financial systems, and best practices for financial transactions such as procurement and travel reimbursement.</p> <p>Train IET staff on the use of online applications such as DaFIS DS, Online PrePurchasing system (OPP), AggieBuy, AggieTravel, and the AggieService.</p> <p>Update Contracts section of ServiceNow with current purchasing contract information to alert managers/supervisors and business unit staff of need of renewals, extensions, or replacements. Update MOU section of Contracts with current MOU and SLAs to inform business and Finance Team of working agreements with campus partners.</p> <p>30% TRAVEL, FINANCIAL, AND BUSINESS SUPPORT Process travel and business transactions not performed by the SSO. This includes processing purchasing, travel requests, travel reimbursements and prepayments, invoice payments and returns using systems such as Online PrePurchasing (OPP), AggieBuy, and AggieTravel.</p> <p>Process transactions through campus service channel, The Shared Services Organization (SSO) using AggieService system.</p> <p>Use and regularly reconcile a University Purchasing Card.</p> <p>Process cash collections, including third-party checks to the university.</p> <p>Act as ATR for IET. Set up new desk and mobile phones as requested by users and supervisors and upon onboarding as identified to be necessary. Make requested changes through the ATR portal.</p> <p>20% BACKUP AND ANCILLARY DUTIES Provide business support for other business services that are not listed above.</p> <p>Complete assigned daily tasks such as checking and filing office mail, checking out parking permits, receiving and routing packages.</p> <p>Coordinate with other operational staff to meet operational needs. Fill in as needed for business assistants that are located offsite providing location specific support.</p> <p>Provide low level facilities support for various locations by reporting issues and receiving requests in the facilities section of ServiceNow when the facilities team is unavailable.</p> |
| <p>Physical Demands:</p> | <p>Lift and carry packages and items weighing up to 25 pounds.</p> <p>Sit at a desk and in front of a computer screen for extended periods of time.</p> |

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| Work Environment: | <p>Work occasional overtime and/or be available for callback after working hours and with short notice.</p> <p>Work in a busy office environment with frequent interruptions.</p> <p>Travel between campus and off-campus locations and be able to work at more than one location.</p> <p>Work with a geographically dispersed team and use instant messaging, emails, video conferencing and voice conferencing to collaborate and keep in touch.</p> <p>Vacation is restricted during fiscal close and other IET peak work periods.</p> <p>Adhere to workplace safety practices, read information communicated about workplace safety, complete required safety training on time, and report any workplace safety issues promptly to their supervisor or the designated safety coordinator.</p> <p>UC Davis is a smoke and tobacco free campus. Smoking, the use of smokeless tobacco products, and the use of unregulated nicotine products (e-cigarettes) will be strictly prohibited on any UC Davis owned or leased property, indoors and outdoors, including parking lots and residential space.</p> |
| Background Check: | Yes |
| QUALIFICATIONS | |
| Minimum Qualifications: | <p>Experience in applying basic accounting knowledge (ledger review, double-entry accounting, recognizing expenses and revenues).</p> <p>Experience reviewing and approving financial transactions that involve multiple accounts, multiple approvals and multiple vendors.</p> <p>Experience with purchasing and travel transactions.</p> <p>Skill to objectively review and evaluate data/information and make timely decisions.</p> <p>Experience using an enterprise-level electronic financial transaction system (e.g. accounting systems, procurement systems, invoice payment systems).</p> <p>Experience working with a variety of individuals and communicating financial and facilities related issues to non-business office staff.</p> <p>Math skills to review and verify financial transactions (add, subtract, multiply, divide, fractions, calculate percentages, basic algebra).</p> |
| Preferred Qualifications for Selection: | <p>Experience with UC and UC Davis policies and procedures on purchasing, travel, communications, and recharging/billing.</p> <p>Experience generating financial reports and charts using Microsoft Excel.</p> <p>Experience recharging and billing in the UC system.</p> <p>Experience independently conducting research on policies and procedures to resolve issues related to the job.</p> <p>Customer service experience to work with clients.</p> |

Knowledge of legal, ethical, and University standards and regulations related to this job.

Expectations

Job Expectations

Read and model the UC Davis Principles of Community.

Use tact and diplomacy for interactions with others.

Ability to work independently (with minimal daily supervision) to complete daily work and assigned tasks and projects efficiently and on time.

Adhere to workplace safety practices, read information communicated about workplace safety, complete required safety training on time, and report any workplace safety issues promptly to their supervisor or the designated safety coordinator.

Communication skills to understandably and effectively describe financial issues, policies and procedures, and workplace safety to non-business oriented audiences.

Convey a helpful and positive attitude in support of the BOU's client service environment.

Maintain flexibility in a continuously changing and fast paced work environment.

Ability to work independently under general direction from management, to manage workload across multiple simultaneous projects, to maintain a high level of productivity, and to meet deadlines under time constraints and continuously shifting priorities.

Maintain up-to-date knowledge through literature, classes, exhibits, seminars, on-the-job training and other relevant training forums.

Accountability for the safekeeping of resources in the employee's care and custody and for following and implementing the cyber-safety guidelines.

Demonstrate flexibility and willingness to assist in other areas of the department when needed.

Attention to details to maintain a high-standard of accuracy and completeness in various functions.

Stays current with all university, UC Davis, and IET policies and procedures applicable for the major job functions.

Maintain working relationships with various central campus departments such as the SSO and Accounting and Financial Services to effectively serve as a liaison.

Ensure physical and electronic documentation is stored properly and meets audit and campus policy requirements for financial records retention.