### Position Description

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<th>Requisition #</th>
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<td>Position Number:</td>
<td>02013841</td>
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<tr>
<td>Dept:</td>
<td>VP-INFO &amp; EDUCATIONAL TECH - 061425</td>
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<tr>
<td>Position:</td>
<td>PRINCIPAL BUSINESS TEAM ASSISTANT</td>
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**Approved Payroll Title Code:**

4722

**Approved Payroll Title:**

_____ ASSISTANT III

| Approved MSP Salary Grade: | |
| Approved PSS Salary Grade: | 0 |

### POSITION DETAILS

**Job Summary:**

Under the general supervision of the Information and Educational Technology (IET) Finance Manager, independently provides business support to several IET departments. Ensures financial transactions from procurement to vendor payment to travel reimbursement are compliant with applicable campus and division-wide policies. Oversees the financial process for accurate, timely and efficient execution. Manages physical and electronic documentation.

Serves as a liaison between IET and various campus entities (e.g. SSC, Central A/P, Travel, etc.) to assist on issue escalation and resolution.

**Campus Job Scope:**

This position works under the Business Operations Unit (BOU), an IET centralized group that provides a wide range of business services including accounting, facilities management, equipment management, safety services, and billing.

**Department Specific Job Scope:**

IET has an operating budget of $47M annually and has a throughput of material expenses, including pass-thru costs for other campus departments, ranging from $2M to $5M annually.

IET operates on more than 85,000 square feet distributed to over 22 buildings located both on and off campus. This includes two mission critical facilities: Campus Data Center and the Network Operations Center, which requires specialized HVAC, electrical and network.
infrastructure.

The division has seven major departments, which includes over 300 career, contract, and student staff.

This is one of two positions providing business services in a distributed environment. Both positions operate independently and do not work physically together and must rely on electronic communication resources. Their day-to-day work impacts health and safety, operations, and policy compliance.

Positions Supervised: N/A

40% FINANCIAL SUPPORT, POLICY, AND PROCESS COORDINATION
Reviews and approves financial transactions for completeness, accuracy, and compliance. Resolves issues that impede the progress of transactions. Reports system, process or performance issues appropriately.

Serves as a liaison between IET staff, IET management, and SSC staff. Serves as a liaison between IET staff and vendors.

Communicates to IET staff and managers on policies and procedures, financial systems, and best practices for financial transactions such as procurement and travel reimbursement. Trains IET staff on the use of online applications such as DaFIS DS, Online PrePurchasing system (OPP), AGGIEBuy, AGGIETravel, and the AGGIEService.

30% TRAVEL, FINANCIAL, AND BUSINESS SUPPORT
Processes transactions not performed by the SSC or as requested to address urgent needs. This includes processing purchasing, travel requests, travel reimbursements and prepayments, invoice payments and returns. Processes cash collections, including third-party checks to the university.

Provide event support, including booking rooms for IET events and procuring refreshments and materials for the event.

20% FACILITIES AND DEPARTMENTAL SUPPORT
Serves as a local departmental support for safety coordination, keys, travel, facilities, fleet management and other duties, as assigned. Assists departments as the building liaison to division facilities to ensure the unit remains operational. Provides unit support for billing management of Fleet Vehicles and serve as a liaison with Fleet Services and TAPS.
10% BACKUP AND ANCILLARY DUTIES
Provides business support for other business services that are not listed above. Completes assigned daily tasks such as checking and filing office mail, checking out parking permits, receiving and routing packages, updating meeting room calendars.

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Physical Demands:

Lift and carry packages and items weighing up to 25 pounds.

Crawl under, over and around desks, and maneuver into enclosed areas.

Sit at a desk and in front of a computer screen for extended periods of time.

Work occasional overtime and/or be available for callback after working hours and with short notice.

Arrange vacation time around annual fiscal close and other critical business periods.

Work in a busy office environment with frequent interruptions.

Travel between campus and off-campus locations and be able to work at more than one location.

Work Environment:

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

Work with a geographically dispersed team and use instant messaging, emails, video conferencing and voice conferencing to collaborate and keep in touch.

UC Davis is a smoke and tobacco free campus effective January 1, 2014. 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.

Background Check: Yes

QUALIFICATIONS
Minimum Qualifications:

Experience in applying basic accounting knowledge (ledger review, double-entry accounting, recognizing expenses and revenues).

Experience reviewing and approving financial transactions that involve multiple accounts and multiple approvals.

Experience serving as facilities coordinator sufficient to identify and report issues and ensure timely resolution of problems.

Skills to objectively review and evaluate data/information and make timely decisions.

Experience learning or using multiple, complex software.

Experience using an enterprise level electronic financial transaction systems (e.g. accounting systems, procurement systems, invoice payment systems).

Experience dealing with a variety of individuals and communicating financial and facilities related issues to non-business office staff.

Math skills to review and verify financial transactions (add, subtract, multiply, divide, fractions, calculate percentages, basic algebra).

Preferred Qualifications for Selection:

Experience using Microsoft Excel.

Knowledge general accounting principles as it applies to the university environment.

Knowledge of UC and UC Davis financial, safety, and facilities related policies and procedures.

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

Experience independently conducting research on policies and procedures to resolve issues related to the job.

Experience providing financial reports and charts.

Customer service experience to deal with clients.

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, 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 SSC 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.