

Quick Reference Guide – UCPATH Navigation for HCM & GL Transactions at UCLA

In this Job Aid, we list out the navigation required before beginning a specific transaction. The PeopleSoft Menu is the same as your “Main Menu”; all of these navigations may be bookmarked in your favorites.

HCM & Payroll Navigation

<p>Smart HR Template Transactions</p> <p><i>Submit Template Transactions and view submitted Template Transactions</i></p>	<p>PeopleSoft Menu > Workforce Administration > Smart HR Template > Smart HR Transactions</p>
<p>Job Data Inquiry</p> <p><i>View employee Job Data</i></p>	<p>PeopleSoft Menu > Workforce Administration > Job Information > Job Data</p>
<p>Workforce Administration Inquiry</p> <p><i>View a summary of employees' jobs</i></p>	<p>PeopleSoft Menu > Workforce Administration > Job Information > Review Job Information > Workforce Job Summary</p>
<p>Position Control Transactions Create/Update</p> <p><i>Create positions and update vacant positions</i></p>	<p>PeopleSoft Menu > UC Customizations > UC Extensions > Position Control Request</p>
<p>PayPath</p> <p><i>Position, Job & Additional Pay Changes</i></p>	<p>PeopleSoft Menu > UC Customizations > UC Extensions > PayPath Actions</p>
<p>Position Inquiry</p> <p><i>View information for existing positions</i></p>	<p>PeopleSoft Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info</p>
<p>Recurring Additional Pay</p> <p><i>Create recurring additional pay</i></p>	<p>PeopleSoft Menu > Payroll for North America > Employee Pay Data > Create Additional Pay</p>

<p>Payroll Request, Additional Pay & One Time Pay</p> <p><i>Page for setting up additional payments</i></p>	<p>PeopleSoft Menu > UC Customizations > UC Extensions > Self Service Transaction Links</p>
<p>Manage Accruals</p> <p><i>Employee accrual / take adjustment</i></p>	<p>PeopleSoft Menu > UC Customizations > UC Extensions > Manage Accruals</p>
<p>Extended Absence Initiate Transaction</p> <p><i>Request New leave or leave type</i></p>	<p>Peoplesoft Menu > Global Payroll & Absence Management > Payee Data > Maintain Absences > UC Customizations > Request Extended Absence</p>
<p>Extended Absence Approve Transaction</p> <p><i>Update existing leave</i></p>	<p>Peoplesoft Menu > Global Payroll & Absence Management > Payee Data > Maintain Absences > UC Customizations > Administer Extended Absence</p>
<p>Absence Balance Inquiry</p> <p><i>View leave balances</i></p>	<p>PeopleSoft Menu > UC Customizations > UC Extensions > Admin - Review Absence Balance</p>
<p>Person Org Summary</p> <p><i>View all employee jobs</i></p>	<p>PeopleSoft Menu > Workforce Administration > Personal Information > Person Organizational Summary</p>
<p>Transaction Status</p> <p><i>View all template transactions you have submitted</i></p>	<p>PeopleSoft Menu > Workforce Administration > Smart HR Template > Transaction Status</p>

General Ledger Navigation

<p>Funding Entry Inquiry</p> <p><i>View funding information for positions</i></p>	<p>PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry Inquiry</p>
<p>Funding Entry</p> <p><i>Setup or update funding for positions</i></p>	<p>PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > UC Customizations > Funding Entry</p>
<p>Budget Entry</p> <p><i>Setup and update budget distribution information</i></p>	<p>PeopleSoft Menu > Set Up HCM > Product Related > Commitment Accounting > Budget Information > UC Customizations > Budget Distribution</p>
<p>Review Direct Retro</p> <p><i>View existing direct retro transactions</i></p>	<p>PeopleSoft Menu > Payroll for North America > Payroll Distribution > UC Customizations > Review Retro Distribution</p>
<p>Direct Retro</p> <p><i>Setup direct retro / salary cost transfer transaction</i></p>	<p>PeopleSoft Menu > Payroll for North America > Payroll Distribution > UC Customizations > Process Direct Retro</p>