

AGENDA

- Navigating the UCPath System
 - Access
 - Bookmarks
 - UCPath Production Process Schedule
- Reviewing data in UCPath for funding accuracy live demo
- Processing staff funding change
- Processing <u>faculty</u> funding changes live demo
 - Capped salary
 - Multiple Components of Pay (MCP)
- Processing direct retros (UPAYs/PETs) live demo
- Payroll reports from UCPath
- Workflow authorizations/approval routing

UCPATH ACCESS

- All DOM Fund Managers (FM) have been/should be granted General Ledger Initiator (GL-I) role to process fund changes
- Steps to obtain UCPath Access for new FM:
 - FM must complete all online training (see following slide)
 - MSO Email DSA Gabriela Rivera <u>gmrivera@mednet.ucla.edu</u> with FM information:
 - Full name
 - UCLA ID
 - Email address
 - Working Title
 - Department Code
 - Role requested: GL-I
 - Certificates of completion
- Typically takes ~2 days to obtain access

GL-I REQUIRED COURSE

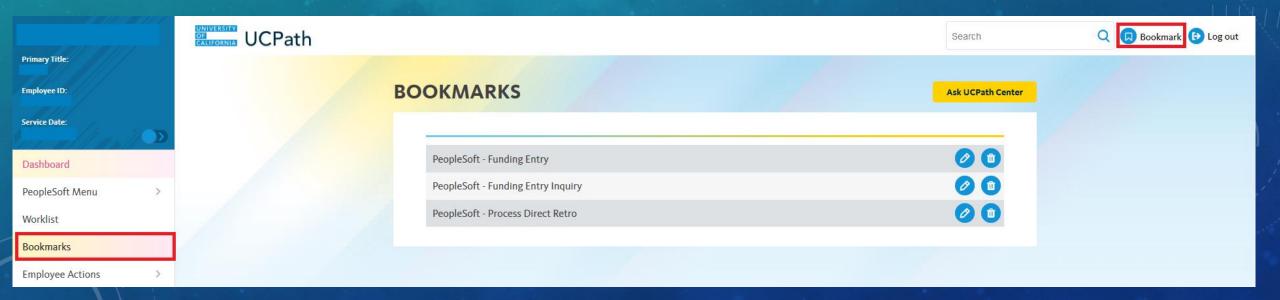
Course Location:

https://ucpath.ucla.edu/UCPATH-TRAINING-COURSES

Training Course	Hours	Initiator
UCLA Overview	0.33	С
PeopleSoft Overview	0.25	С
Basics and Navigation	1	С
Approval Workflow Engine (AWE) Overview and Approvals	0.5	С
Position Control	4	С
Funding Entry and Updates	4	С
Funding Entry Inquiry	0.33	С
Direct Retro Inquiry	0.33	С
Budget Distribution	4	С
Total Required Courses		9
Estimated Total Required Hours		15

BOOKMARKS

- Creating bookmarks is a good way to help you quickly navigate
 - Use <u>Quick Reference Guide</u> to navigate to desired frequently used page
 - Click "Bookmark" in the upper right corner next to the Log out button to bookmark that page
 - To search Bookmarks, go to main Dashboard Bookmarks



DEADLINES & PRODUCTION PROCESS SCHEDULE

- Two places to locate production schedule:
 - UCPath Quicklinks Payroll Calendars & Schedules Payroll Processing Schedule 2018
 - DOM ORA website: https://medschool.ucla.edu/workfiles/Site-ORA/referencematerials/UCPath-CRU-Processing-Calendar.pdf
- Find GL Post Confirm Column All transactions must be **APPROVED** day before this date
- Example: To have payroll fund changes & direct retros hit for the month of October 2018, it must be approved in the system by Saturday, October 28th

Pay Cycle	Check Date	Pay Period Ends Run ID Schedule		UCLA Campus Local Processing Schedule				UC Path Center	
		Begin	End		• Mass File Transactions Due (3pm to CRU)	• Inbound Files (3pm to UCPC)	Pay PathHR TemplateLeave Transaction(3pm in UCPath)	• Location corrections to Msg Error log (2pm to UCLA)	• GL Post Confirm
BW1	10/3/2018	9/9/2018	9/22/2018	180922B1X	Fri 9/21/18	Mon 9/24/18	Mon 9/24/18	Wed 9/26/18	Sat 09/29/18
BW2	10/17/2018	9/23/2018	10/6/2018	181006B2X	Wed 10/3/18	Fri 10/5/18	Thu 10/4/18	Tue 10/9/18	Fri 10/12/18
BW3	10/31/2018	10/7/2018	10/20/2018	181020B3X	Wed 10/17/18	Fri 10/19/18	Thu 10/18/18	Tue 10/23/18	Fri 10/26/18
MO	Thu 11/1/18	10/1/2018	10/31/2018	181031M0X	Thu 10/18/18	Wed 10/17/18	Fri 10/19/18	Tue 10/23/18	Mon 10/29/18

PAYROLL REPORTS

- Future payroll projections there is currently NO reporting tool that will provide this information. For now, it must be done manually. ☺
- DGSOM QDB Reports
 - GL data is still accurate
 - Historical detailed payroll data through 08/31/18 is accurate
 - No detailed payroll data as of 09/01/18. Must use Cognos.
- CDW Cognos Reports
 - Access via web OFSR reports or via UCLA Enterprise Data Warehouse Website
 - DOM ORA chapter on how to run Distribution of Payroll Expenses (DOPE) report

FUND CHANGE APPROVERS

- All approvers will receive notifications for both staff & academic for the time being.
- STAFF transactions: A1 & A2 both within the Division
 - Cathy Rujanuruks & Raellen Man will be the A2 approver for smaller divisions who do not have a staff A2 approver
- ACADEMIC transactions: A1 = MSOs/backup. A2 = Academic Compensation

WORKLIST

- How to manage your worklist?
- How to know which items require your approval and which do not?
- What are you reviewing for when you open a transaction?

RESOURCES

 UCPath Website: https://ucpath.ucla.edu/

 DOM ORA Website – Post-Award – UCPath: https://medschool.ucla.edu/ora/ucpath

 UCLA Enterprise Data Warehouse: for reporting https://www.it.ucla.edu/enterprise-data-warehouse