



# DOM UCPATH TRAINING

OCTOBER 11, 2018

# 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 faculty 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 [gmriviera@mednet.ucla.edu](mailto:gmriviera@mednet.ucla.edu) 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>

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

# BOOKMARKS

- Creating bookmarks is a good way to help you quickly navigate
  - Use [Quick Reference Guide](#) 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

The screenshot displays the UCPATH system interface. On the left is a navigation sidebar with a blue header and a white menu. The menu items are: Primary Title, Employee ID, Service Date, Dashboard (highlighted in pink), PeopleSoft Menu, Worklist, Bookmarks (highlighted with a red border), and Employee Actions. The main content area has a white header with the University of California logo and 'UCPath' text. To the right of the header is a search bar and a 'Bookmark' button (highlighted with a red border) next to a 'Log out' button. Below the header, the main content area is titled 'BOOKMARKS' and features a yellow 'Ask UCPATH Center' button. A white box contains a list of three bookmarks, each with an edit icon and a delete icon:

PeopleSoft - Funding Entry		
PeopleSoft - Funding Entry Inquiry		
PeopleSoft - Process Direct Retro		

# 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 28<sup>th</sup>

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 Path • HR Template • Leave 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>