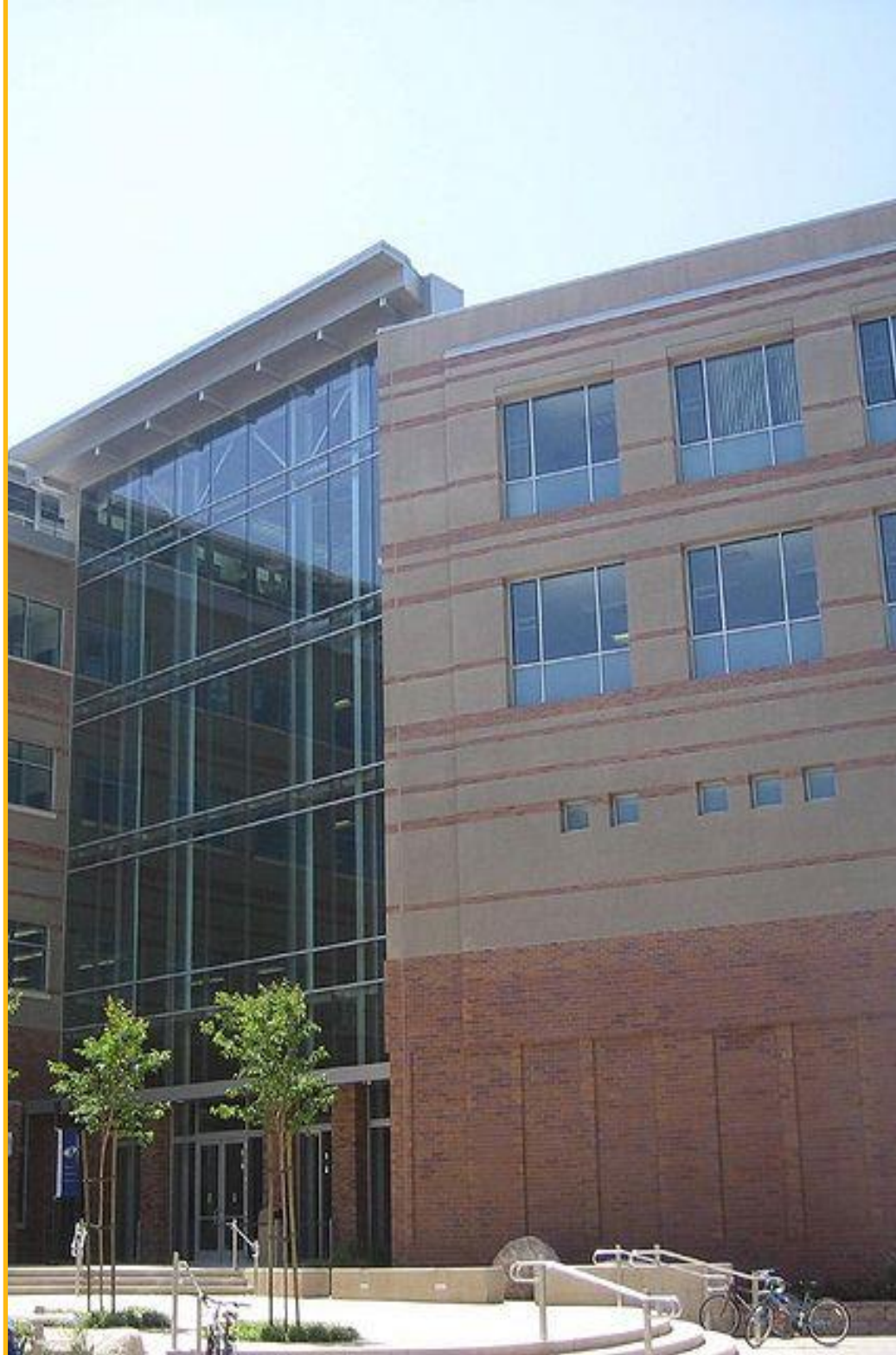# UCPath Training Guide

**2022-2023**

**University of California, Irvine**

Version 2.1

**UCI UCPath**

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# 1. OVERVIEW

## 1.1 WHAT IS UCPATH

UCPath is the University of California's modernized payroll, benefits, human resources and academic personnel system for all UC employees. It replaced UC's 35-year old Payroll/Personnel System (PPS) and launched at UC Irvine in January 2020.

UC employees can log on to one central online portal called UCPath Online to view pay information, benefits, sign up for direct deposit, update tax withholdings, see vacation and sick leave balances, and more.

The **UCI UCPath project team** serves the UCI campus and Medical Center communities and helps to educate and train employees for the new system.

## 1.2 HOW DO I GET ACCESS TO UCPATH?

To obtain access to UCPath, certain role-based training courses must be completed in order to ensure compliance and satisfactory work performance. Based on the assigned job responsibilities and security roles needed, please review the UCPath Training Curriculum to assess what training is required.

All training courses are available online and can be located in the **UC Learning Center (UCLC)**. Once training has been completed and validated by your Manager or DSA, access will then be requested and assigned.

*If you have questions about UCPath access, please email ucpath@uci.edu*

## 1.3 SECURITY ROLES & TRAINING REQUIREMENTS

Access to perform certain activities and transactions *(payroll, HR transactions, creating positions, or funding)* in UCPath is governed by **KSAMS** and determined by your job duties. The image below provides an overview for requesting UCPath access. Access may vary from person to person, based on what their job requires.



The UCPath Roles Wiki gives you an in-depth understanding of each KSAMS security role along with the type of functions or transactions that can be entered with that role in UCPath.

The security roles listed will also display a summary of required training courses required for access.
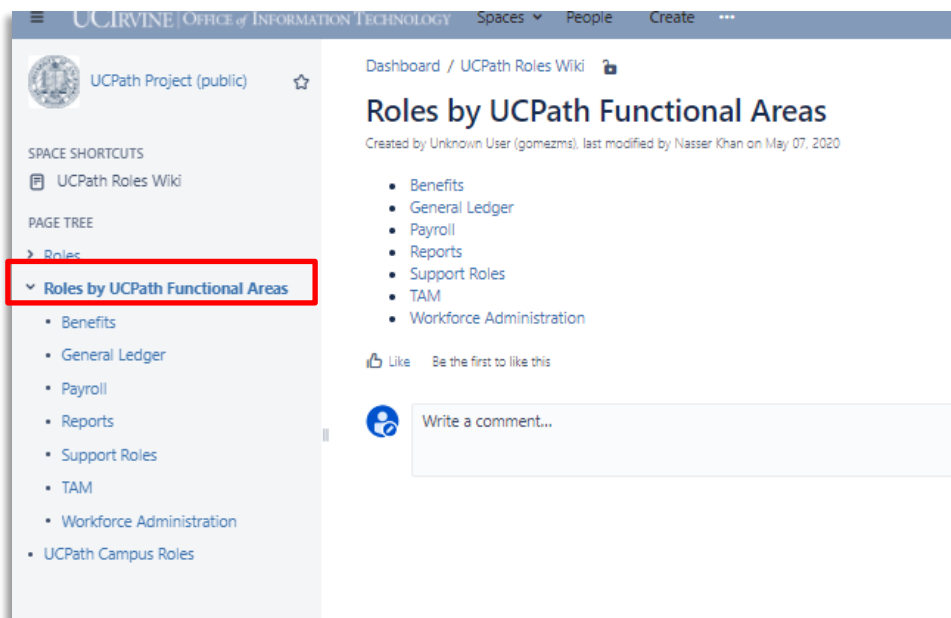


**Tip:** You can search for various roles within each Functional Area to view Role descriptions, training requirements, list of accessible system menus, and more.

## 1.4 TRAINING CURRICULUMS

The UCPath training curriculum lists a series of courses which need to be completed by new employees based on their job responsibilities and the security roles they need.

The curriculum will aide in planning training and other learning activities and each course is listed in the recommended order it should be taken. Please register and complete the indicated pre-requisite courses listed prior to attending Instructor Led training courses.

See below to view training requirements by security role or click here to view the full training curriculum.

**Training Pre-Requisites:**

*NOTE: To gain access to UCPath, required training courses must be completed in UCLC. Training materials on the UCPath website are for reference and review

| Security Role | Online Pre-Requisite Training | | | | |
|---|---|---|---|---|---|
| | UCP101: Intro to UCPath | POS103: Intro to Position Mgmt. | FIN101: Intro to Position Funding | TEM101: Intro to Smart HR Templates | PPA101: Intro to PayPath Actions |
| UCP – Campus HCM Initiator | R | R | R | R | R |
| UCP – Campus HR Approver | R | R | R | R | R |
| UCP – Campus HCM Inquiry | R | R | R | R | R |
| UCP - Campus Funding Initiator | R | R | R | R | R |
| UCP - Campus Budget Entry | R | R | R | O | O |
| UCP - Campus Cost Transfer Initiator | R | R | R | O | O |
| UCP – Campus GL Approver | R | R | R | R | R |
| UCP – Campus GL Inquiry | R | R | R | O | O |

**Virtual Instructor Led Training Bootcamp:**

| Security Role | Virtual Instructor Led Training | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | *POS202: UCPath Nav & Position Control | *FIN202: Position Funding Entry | *TEM301: Template Transactions Pt. I | *TEM302: Template Transactions Pt. II | *PPA310: PayPath Actions Pt. I | *PPA320: PayPath Actions Pt. II | *PRQ301: Payroll Requests | *ABM320: Absence Mgmt. | *DRD301: Direct Retro | *BDP100: Budget Distribution |
| UCP – Campus HCM Initiator | R | R | R | R | R | R | R | R | O | O |
| UCP – Campus HCM Approver | R | R | R | R | R | R | R | R | O | O |
| UCP – Campus HCM Inquiry | R | O | O | O | R | O | O | O | O | O |
| UCP - Campus Funding Initiator | R | R | O | O | R | O | R | O | O | R |
| UCP - Campus Budget Entry | O | R | O | O | O | O | O | O | O | R |
| UCP - Campus Cost Transfer Initiator | R | R | O | O | O | O | O | O | R | O |
| UCP – Campus GL Approver | R | R | O | O | R | O | R | O | R | R |
| UCP – Campus GL Inquiry | O | R | O | O | O | O | O | O | O | R |

# 2. TRAINING RESOURCES

## 2.1 UC LEARNING CENTER

All UCPath training needed for security access must be completed online via UCLC.

Login to the **UC Learning Center (UCLC)** with your UCINet ID and click the *"Find a Course"* button to search and register for the desired course. You will be required to verify your identity and complete the multi-factor authentication to access the site.

**Navigation:** UC Learning Center > Find a Course > Enter course name (refer to assigned curriculum)
- ***Example:*** *"POS101", "FIN101", "Position Control"*

*Step 1:*
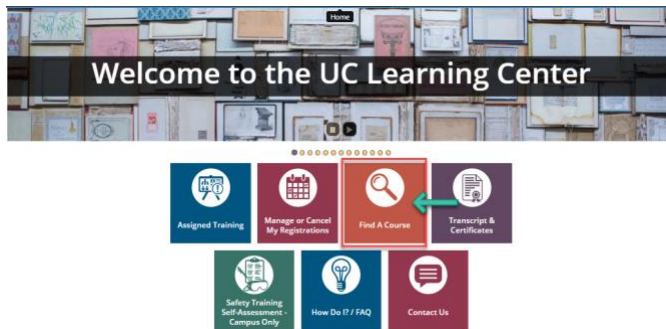


*Step 2:*



## WHAT ARE YOU LOOKING FOR TODAY?

Select a specific item to navigate to your area of interest. Search supports the use of the asterisk (*) wild card to represent one or more unspecified characters. If no results match your search, Search will return any results that closely match what you entered.

Once you've found the course, click "***Register***" to enroll and start the online training.
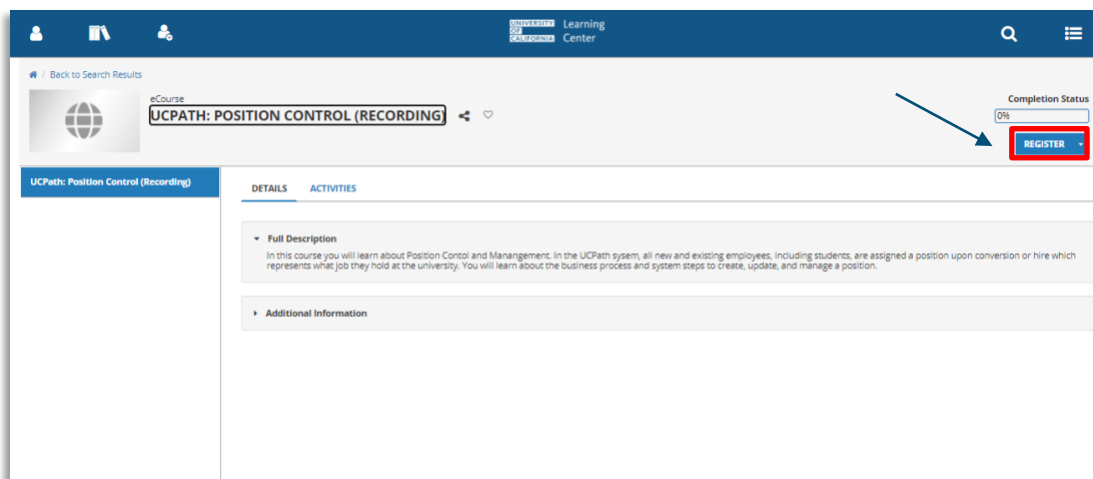
**Note:** If you are unable to register for a live training session, each instructor led training course is conveniently recorded and can be taken on-demand.



*Disclaimer:* The UCPath system is maintained and updated frequently which may result in the production environment to function or appear differently than what is shown in training.

## 2.2 UCI UCPᴀᴛʜ Wᴇʙꜱɪᴛᴇ

Visit our UCI UCPath website and search for additional training content within the **Transactional User Materials** section. We recommend users frequently visit this site to stay informed and learn about the latest information regarding important announcements or changes.



On the website, browse through each of the **UCPath Support Document** categories for additional training content such as: *relevant job aids, business process guides, quick reference guides, and much more!*

## 2.3 UPK Simulations

The information provided below is University of California's central training simulation libraries for all UCPath related transactions. UCPath Help Site UPK's are an easy-to-use, comprehensive, on-demand training tool that provides step-by-step guidance for various UCPath transactions.

**There are 3 (three) UCPath simulation help sites:**
1. Employee Self-Service *(General employee initiated requests)*
2. Manager Self-Service *(Manager actions)*
3. UCPath System Users *(HR and Finance transactions)*

*Note: UCPath security access determines which help site library will be accessible.*

The simulation libraries can be accessed via the **UPK Simulations section** in the Transactional Users section of the UCI UCPath site. These simulations are intended to be supplemental training materials and are also referenced in the online training courses.

**There are 3 (three) different user modes that are available to deploy within each of the UCPath Help Sites:**

1. **See it! Mode:** Is a step-by-step **video** simulation, which demonstrates an example of how to execute the topic selected.
2. **Try It! Mode:** A guided, **hands-on** learning experience that allows the user to participate through virtual instruction.
3. **Print It! Mode:** Allows the end-user to **print** out a step-by-step guide (job aid) that can be utilized or referenced in the work place.
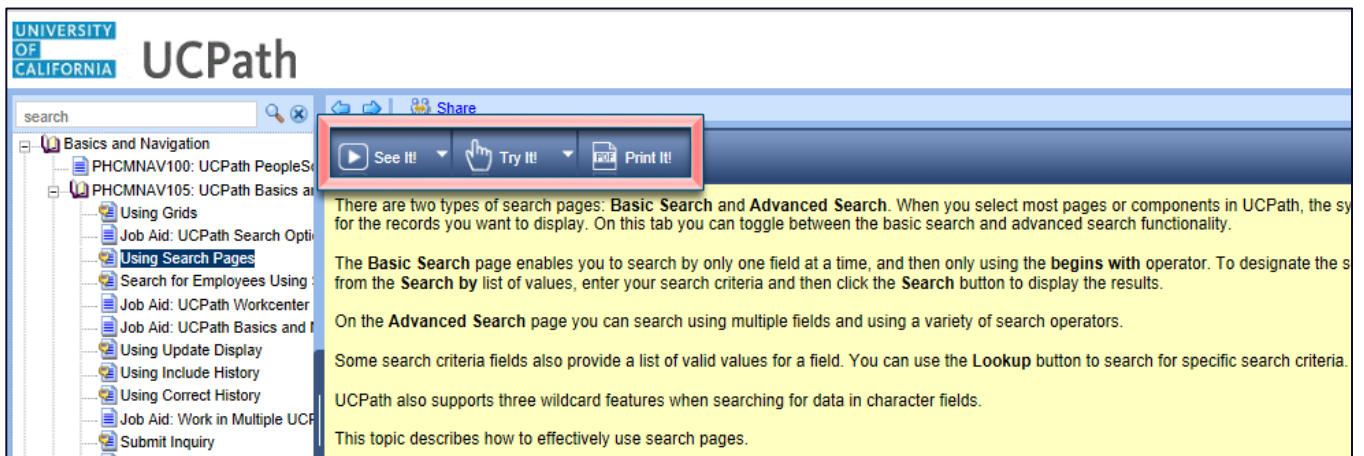
1. You can utilize the **Search** field at the top of the simulation library section to find simulation topics by typing in key words.

2. You can also click the **[+]** next to each module (purple book) to expand the section and view more topics.

3. Once you have found the desired topic, click the link to activate the simulation modes.
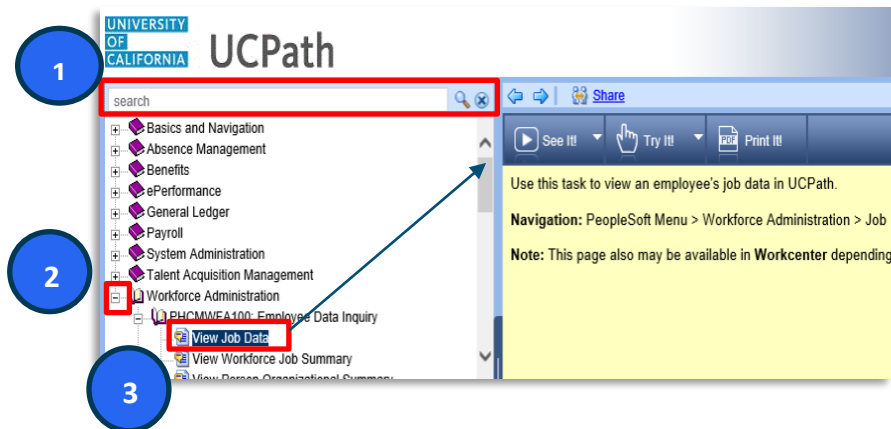


## 2.4 TRAINING ENVIRONMENT

Once you have completed your assigned training, practice what you've learned by accessing the **UCPath Training Environment** to enter transactions for a hands-on experience. This is a great tool to work through typical workday scenarios and enhance overall UCPath knowledge.

Before you access the training environment, you must first log into the appropriate VPN client.
- View the "Connecting to Training Environment" document on our UCI UCPath website to view VPN connection instructions.
- **The password to access the VPN is updated weekly**, and must be requested by contacting UCPathTraining@uci.edu

After connecting to the VPN, you can utilize the Training Environment Access guide to view instructions on how to select an appropriate User ID and connect to the training environment. The document provides an explanation of each User ID and what it can be used for. Once logged in, you can explore the various menus and functionality, as well as enter transactions in an envirnoment that will not cause any impacts to HR or payroll.

If you experience technical issues you may contact: ucpathtraining@uci.edu

**Note:** You can view all of the Training Environment Login IDs here. Additional User IDs can be used for group exercises or acvtivies.

The link to the training environment can be located here. It is also embedded into the other documents referenced in this section.

**\*The password for all accounts: ucpath2019 (lower case)**

## 2.5 LEARNING LABS

Learning labs are live virtual hands-on expriences with an instructor who can answer frequently asked questions, provide "lessons-learned", and provide troubleshooting techniques through scenario based exercises.

Learning Labs are annonced and communicated on our UCI UCPath website. Multiple sessions may be available, however, please note registration is limited for each session.



**Note:** If you are not able to register for a lab, or if there aren't any available within your training window, please contact your designated Point(s) of Contact. You may be able to request on-the-job shadowing or request a group session for intra-department training.

# 3. HELP & SUPPORT

## 3.1 POINTS OF CONTACT

Point of Contacts are additional resources for support located within each school or department that can assist users with UCI HR policies and UCPath transactions in UCPath.

Points of Contact serve as a coordinating point for certain processes or transactions. The operating model at UCI reinforces the need for continuou s internal department training & communication.

## 3.2 EMPLOYEE EXPERIENCE CENTER

If you are unable to have your question answered by your designated point of contact, call or submit an online ticket with your question or concern to the Employee Experience Center. A representative will be available to review the details of your questions and provide

## 3.2 DROP-IN SUPPORT CENTER (DISC)

The UCPath drop-in Support center is available for users that have urgent questions regarding transactions that may be pay impacting or time sensitive.

If you are unable to get your question answered by your designated Point of Contact or the Employee Experience Center, please feel free to call the Drop-in Support Center.

The operating hours are Monday - Friday from 8:30 a.m. – 11:30 a.m. via Zoom. Call in any time during these hours for questions about transactions in UCPath.

- **To access the Virtual Support line, use the following Zoom link:** **https://zoom.us/j/8519035805**
- **One tap mobile: +16699006833,,8519035805#**

A support team member will answer the call and ask you what type of question you have, and then direct you how to get support via Zoom. They will direct you immediately to a team member's zoom # or set an appointment for a zoom session later that day.

## 3.4 WEEKLY TRAINING UPDATES

Training updates and "lessons learned" are communicated on our UCI UCPath website.

In the **Transactional User Materials** section of the UCI UCPath website, you can find the latest UCI UCPath newsletters, announcements, and upcoming dates for "Training Tips & Lessons Learnerd" Zoom calls with the UCI UCPath Experts.

- All of the "*Training Tips & Lessons Learned"* Zoom session are recorded and the presentation materials are archived on the UCI UCPath website for.

Please contact your manager or Point of Contact if you'd like to participate in UCPath Training Tips & Lesson Learned calls, or need assistance locating helpful documents.