

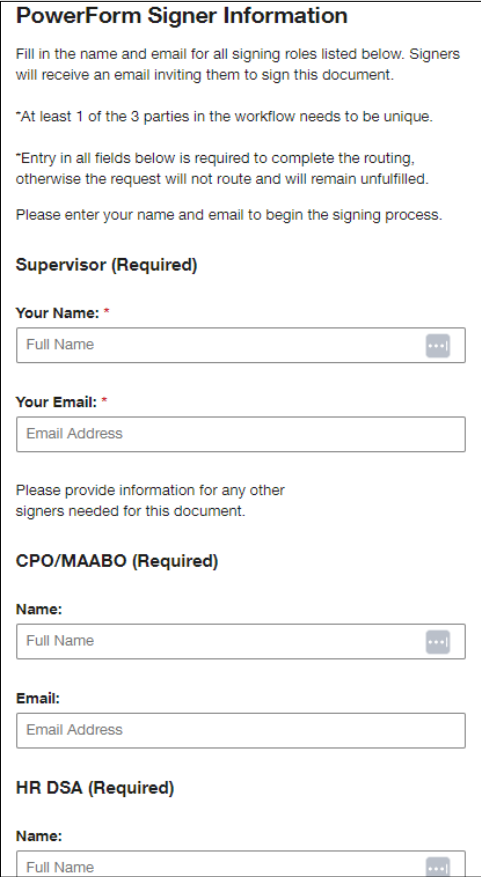
## UCPath Campus User Access Form

Jan 2024

The DocuSign [PowerForm](#) groups access based on transactor's job roles into three groups. Please assess what roles are needed for the user as appropriate for their job responsibilities.

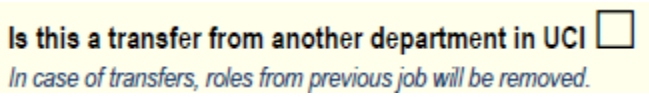
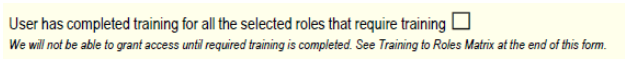
1. <b>Transactions for Workforce Administration</b>	For transactors who are in roles of HR transaction processing.
2. <b>Inquiry access for Non-WFA Transactors Needing Specific Access</b>	For users who need to just view but not change information.
3. <b>Transactions for Funding and General Ledger</b>	For transactors who are in the roles of attaching or changing funding sources to employee's position.

Do not submit form until all training has been completed and the transactor is an active employee (not before start date).

	Section	Instructions	Screenshot
	<b>Setting Up Workflow in DocuSign</b>	<ol style="list-style-type: none"> <li>1. The first is the requesting supervisor to sign.</li> <li>2. The second is the approving CPO, MAABO or HR Business Partner as appropriate. If most are GL roles, perhaps MAABO signs, for example.</li> <li>3. The third to get the form is your HR DSA who doesn't sign but initiates the KSAMS requests based on this form.</li> <li>4. The form is routed automatically to named HR DSA and UCPATH Security.</li> <li>5. If Section 7 has been completed, please print the form after completing it,</li> <li>6. and email for approval to the exception authorizer.</li> </ol>	 <p><b>PowerForm Signer Information</b></p> <p>Fill in the name and email for all signing roles listed below. Signers will receive an email inviting them to sign this document.</p> <p>*At least 1 of the 3 parties in the workflow needs to be unique.</p> <p>*Entry in all fields below is required to complete the routing, otherwise the request will not route and will remain unfulfilled.</p> <p>Please enter your name and email to begin the signing process.</p> <p><b>Supervisor (Required)</b></p> <p>Your Name: *</p> <p>Full Name</p> <p>Your Email: *</p> <p>Email Address</p> <p>Please provide information for any other signers needed for this document.</p> <p><b>CPO/MAABO (Required)</b></p> <p>Name:</p> <p>Full Name</p> <p>Email:</p> <p>Email Address</p> <p><b>HR DSA (Required)</b></p> <p>Name:</p> <p>Full Name</p>
1	User Details	<ul style="list-style-type: none"> <li>• User's primary HR Department or the department assigned-to (if TES employee, for example).</li> <li>• Employee ID is optional.</li> </ul>	

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	Section	Instructions	Screenshot																				
2	Previous Access	This is critical information to enforce control over excessive & cumulative access. The previous access needs to be removed as it was approved by previous supervisor and is no longer valid.																					
3	Roles Requested	Make selections appropriate to user's responsibilities without providing excessive or inappropriate access. Details of training curriculum are in Roles Wiki. If a role being added to the list that is not in this form, supervisor needs to get approval <i>before</i> the form is sent to HR DSA for processing in KSAMS.	<table border="1"> <thead> <tr> <th></th> <th>Typical Titles</th> <th>Function</th> <th>KSAMS Role Name</th> <th>Required?</th> </tr> </thead> <tbody> <tr> <td colspan="5">Transactions for Workforce Administration (see training matrix at end of form)</td> </tr> <tr> <td>1</td> <td>HR Analyst</td> <td>Initiates new or updates existing employee information such as hires, positions assignments, PayPath, or Pay changes. Manages LOA.</td> <td>UCP-Campus-HCM Initiator (Requires Training)</td> <td><input type="checkbox"/></td> </tr> <tr> <td>2</td> <td>Approver of HR Analyst</td> <td>Approves transactions for new or existing employee information such as hires, positions assignments.</td> <td>UCP-Campus-HCM Approver 1-...</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>		Typical Titles	Function	KSAMS Role Name	Required?	Transactions for Workforce Administration (see training matrix at end of form)					1	HR Analyst	Initiates new or updates existing employee information such as hires, positions assignments, PayPath, or Pay changes. Manages LOA.	UCP-Campus-HCM Initiator (Requires Training)	<input type="checkbox"/>	2	Approver of HR Analyst	Approves transactions for new or existing employee information such as hires, positions assignments.	UCP-Campus-HCM Approver 1-...	<input type="checkbox"/>
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2	Approver of HR Analyst	Approves transactions for new or existing employee information such as hires, positions assignments.	UCP-Campus-HCM Approver 1-...	<input type="checkbox"/>																			
4	Training Completion	If the selected role requires training, please check box to certify as such.																					
5	Department Access	List the department whose employees the user needs to access or process. HR Hierarchy report is available here.	<table border="1"> <thead> <tr> <th>KSAMS Role for Department Level Security</th> <th>UCPath HR Department ID</th> </tr> </thead> <tbody> <tr> <td>UCP-Campus Department Level Security</td> <td></td> </tr> <tr> <td>UCP-Campus Department Level Security</td> <td></td> </tr> </tbody> </table>	KSAMS Role for Department Level Security	UCPath HR Department ID	UCP-Campus Department Level Security		UCP-Campus Department Level Security															
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6	Approvals.	Approver names and signatures required and dated.	<p>6. Approvals:</p> <table border="1"> <thead> <tr> <th>Requesting Supervisor</th> <th>Signature</th> <th>Name</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>CPO/MAABO/HRBP</td> <td>Signature</td> <td>Name</td> <td>Date</td> </tr> </tbody> </table>	Requesting Supervisor	Signature	Name	Date	CPO/MAABO/HRBP	Signature	Name	Date												
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7	Exception request.	<p>1. If a role outside of the list is being requested. It is expected that the approval from relevant central group has been obtained ahead of submitting the form.</p> <p>2. If department</p>	<p>7. Exception authorizer's approval and justification. Please complete this section only when Role 15 or 16, or both, have been entered. For exception approval, please print this form and obtain approval by email.</p> <table border="1"> <thead> <tr> <th>Authorizer Name</th> <th>Signature</th> </tr> </thead> <tbody> <tr> <td></td> <td>&lt;Example&gt;</td> </tr> </tbody> </table>	Authorizer Name	Signature		<Example>																
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Section	Instructions	Screenshot
	<p>access being requested outside of employee's division, approval justification needs to be noted.</p> <p>3. Note that requesting access to department outside the division or school will be approved by DSA of the other division or school.</p> <p>4. End dates of the exceptions are required.</p>	

### Roles-to-Training Matrix

#### Training Pre-Requisites

Security Role	Online Pre-Requisite Training				
	UCP101: Intro to UCPath	POS101: 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 HCM 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

\*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 only.

**R=Required**  
**O=Optional**  
**\*UCLC**

#### Recorded or Virtual Instructor Led Training

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

## UCPath Campus User Access Form

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Sample

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### UCPath User Access Request DocuSign PowerForm Campus Transactors

This form is a source document for user's KSAMS access request for UCPath online security.



Supervisors complete this form.

#### 1. User Details:

User's UCInetID		Date	
User's Name		Working/Payroll Title	
Employee ID		User's Department (Primary Job)	IR

#### 2. Previous Access:

Is this a transfer from another department in UCI ☐  
In case of transfers, roles from previous job will be removed.

#### 3. Roles Requested:

	Typical Titles	Function	KSAMS Role Name	Required?
Transactions for Workforce Administration (see training matrix at end of form)				
1	HR Analyst	Initiates new or updates existing employee information such as hires, positions assignments, PayPath, or Pay changes. Manages LOA.	UCP-Campus-HCM Initiator (Requires Training)	<input type="checkbox"/>
2	Approver of HR Analyst transactions.	Approves transactions for new or existing employee information such as hires, positions assignments, PayPath, LOA, or Pay changes.	UCP-Campus-HCM Approver 1-All (Requires Training)	<input type="checkbox"/>
3	HR Analyst assigning funding to positions	Initiates funding entries for employee's position funding sources.	UCP-Campus-Funding Initiator (Requires Training)	<input type="checkbox"/>
Inquiry access for Non-WFA Transactors Needing Specific Accesses (see training matrix at end of form)				
4	HR Inquiry only with access to sensitive data.	Inquire payroll, absence, workstudy, or job info related information of employees the transactor is authorized for, includes the WFA with PII and HealthCare Facilitator pages. Sensitive role justification required.	UCP-Campus-HCM Inquiry with PII (Requires Training)	<input type="checkbox"/>
5	HR Inquiry only with no access to sensitive data.	Inquire payroll, absence, workstudy, or job info related information of employees the transactor is authorized for, does not include sensitive information.	UCP-Campus-HCM Inquiry No PII (Requires Training)	<input type="checkbox"/>
7	Payroll or HR Analysts	Initiates Leave Requests, provides any additional information as needed and to Extend Leaves and Return Employees from Leave (role also included in HCM Initiator).	UCP-Campus-LOA (Requires Training)	<input type="checkbox"/>
8	Payroll/Benefits/HR Analysts for reporting	Functions as Health Care Facilitator (HCF) can view employee's benefits information (role also included in HCM Initiator).	UCP-Campus-HCF	<input type="checkbox"/>
9	Departmental support analysts for WFA requests	Ask UCPath. Submit a Salesforce ticket to UCPath for data change related to employee configuration (role also included in HCM Initiator).	UCP-Campus-Support Case Submitter	<input type="checkbox"/>
Transactions for Funding and General Ledger (see training matrix at end of form)				
10	HR Analysts or Financial Analysts	Initiates funding entries for employee's position funding sources.	UCP-Campus-Funding Initiator (Requires Training)	<input type="checkbox"/>
11	Financial Analysts who perform Salary Cost Transfer or Direct Retro.	Initiates transfer of costs of an employee from one funding source to another funding source. Also distributes or redistributes benefits costs over one or more funding sources.	UCP-Campus-Cost Transfers Initiator (Requires Training)	<input type="checkbox"/>
12	Department Budget or Financial Analysts	Maintains and initiates budget entries for budget distribution data.	UCP-Campus-Budget Entry (Requires Training)	<input type="checkbox"/>
13	Approvers of Financial Analysts' DR.	Approver of Funding entry, Benefits cost transfer, and direct retro transactions.	UCP-Campus-General Ledger Approver (Requires Training)	<input type="checkbox"/>
14	Financial Analysts reconciliation and reporting	Review GL information for position funding and cost transfer status.	UCP-Campus-GL Inquiry (Requires Training)	<input type="checkbox"/>
Other Roles Not in List Above				
15*	Add role not in list above			<input type="checkbox"/>
16*	Add role not in list above			<input type="checkbox"/>

For detailed description of authorizations, please review Roles Wiki available from <https://ucpath.uci.edu/security/>.

\* For role not in list, enter the KSAMS role name and complete Section 7 below

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### UCPath User Access Request DocuSign PowerForm Campus Transactors

**4. Training Completion:**

User has completed training for all the selected roles that require training ☐

We will not be able to grant access until required training is completed. See Training to Roles Matrix at the end of this form.

**5. Department Access:**

What departments does this user need access to?

KSAMS Role for Department Level Security	UCPath HR Department ID
UCP-Campus Department Level Security	
UCP-Campus Department Level Security	

Note: Review Cognos report HR Hierarchy Report [RUC1146](#) to determine appropriate level of department access.

**6. Approvals:**

Requesting Supervisor	Signature	Name	Date
CPO/MAABO/HRBP	Signature	Name	Date

**7. Exception authorizer's approval and justification.**

Please complete this section only when Role 15 or 16, or both, have been entered. For exception approval, please print this form and obtain approval by email.

Authorizer Name	Signature		
Approval & Justification	<Example: * Why a role not in list is being requested? * If a role requested is meant for a Central department use, who has provided approval prior to this request? * If a higher access than the division level department is being requested, please specify reasons.		
	KSAMS Role Name	HR Dept (only for Dept Level Role)	End Date
		IR	
		IR	

This form and security access requests are governed by UCI UCPath Security policies.

UCI Security policies are at <https://www.security.uci.edu/program/policy/>

UCI UCPath System Access (Security) process is at: <https://ucpath.uci.edu/security/>