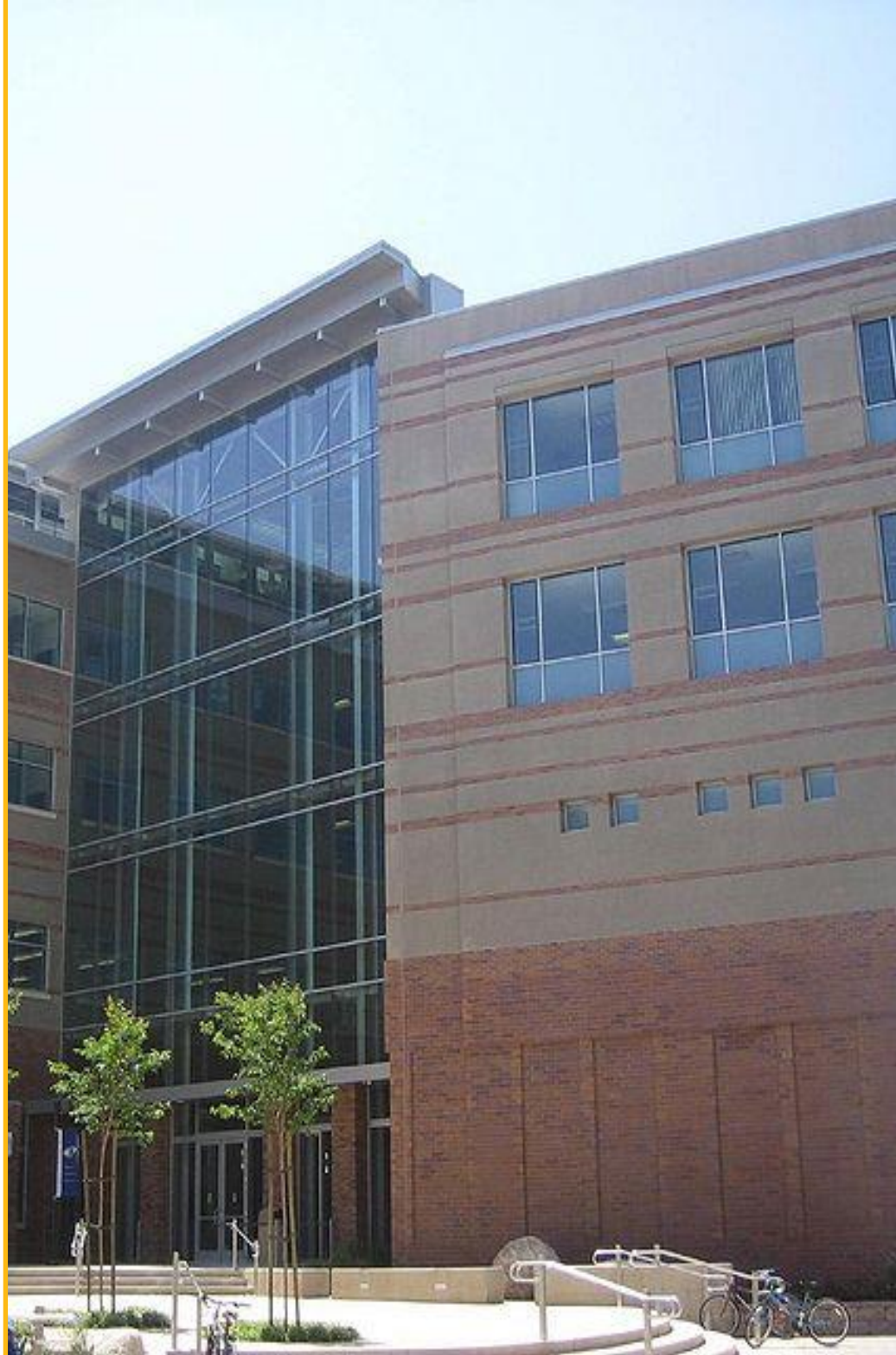# UCPath Training Guide

2021-2022

University of California, Irvine
Version 1.1

UCI UCPath

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1. OVERVIEW

1.1 WHAT IS UCPATH

UCPath is the University of California's new, 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 and 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?

Prior to obtaining access to UCPath, certain role-based training courses must be completed in order to ensure compliance and satisfactory work performance. Based on your job responsibilities and security roles needed, specific training curriculums or requirements will be assigned.

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

If you have questions about UCPath access, please email ucpath@uci.edu
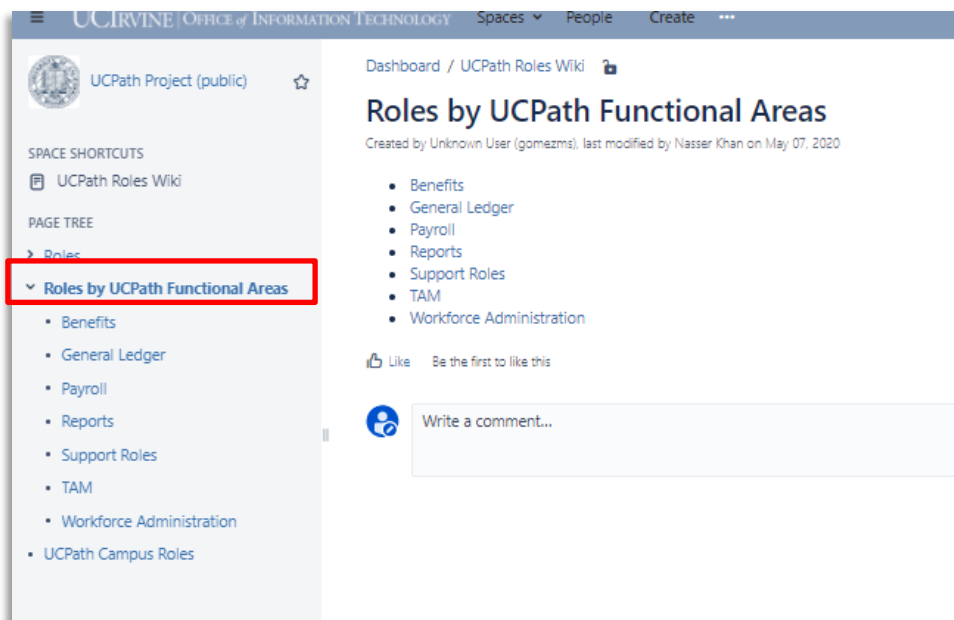
1.3 SECURITY ROLES & TRAINING REQUIREMENTS

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.

One resource to help you understand what security roles you need to request for assigned job duties is the UCPath Roles Wiki.

UCI Roles Wiki gives you an in-depth understanding of each KSAMS role needed to enter certain transaction in UCPath.

Many security roles listed will provide a summary of required training courses which must be completed to obtain 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 curriculums are documents which list a series of instructional courses required to be completed by new employees based on their job responsibilities and the security access needed.

The curriculums will aide in planning training and other learning activities. Each course is listed in the recommended order it should be taken and are available online to provide flexibility.

The UCPath curriculums available are divided into 2 (*two*) main categories: ***HR & HCM, GL & Finance.***

To view the training curriculums, you can visit the UCI UCPath website and follow the navigation below.

Navigation: UCI UCPath Site **> Transaction User Materials > General UCPath Information (under "Training")**

2. TRAINING RESOURCES

2.1 UC LEARNING CENTER

All UCPath training courses are in web-based format and should 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:*** *"UCPath Position Control", "UCPath Template Transactions"*
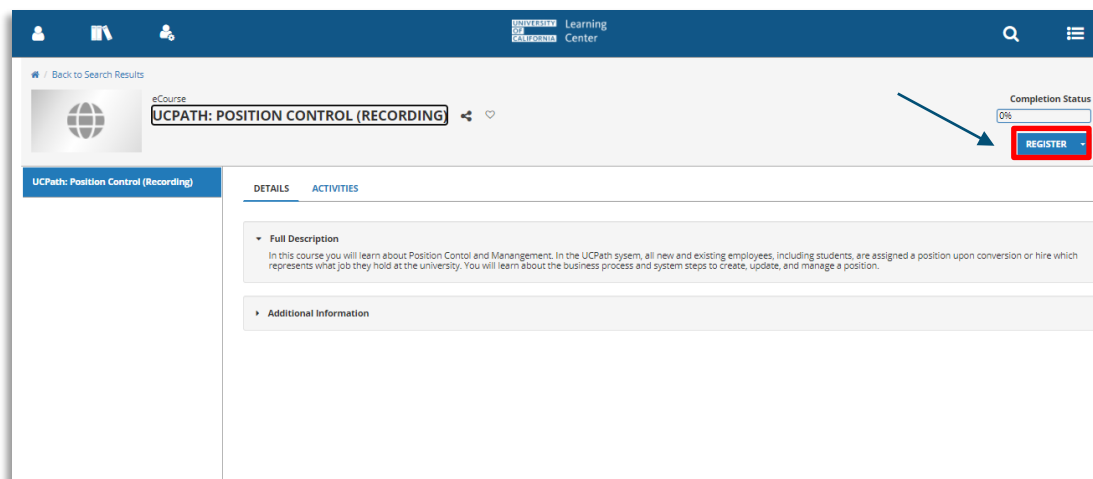
Step 1:

Step 2:

Once you've found the course, click "***Register***" to enroll and start the online training.

Note: Instruction is pre-recorded and is self-paced. Each course is also fitted with knowledge checks to help reinforce key learning points.

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 UCPATH WEBSITE

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, you may browse through each of the **UCPath Support Document** categories 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.
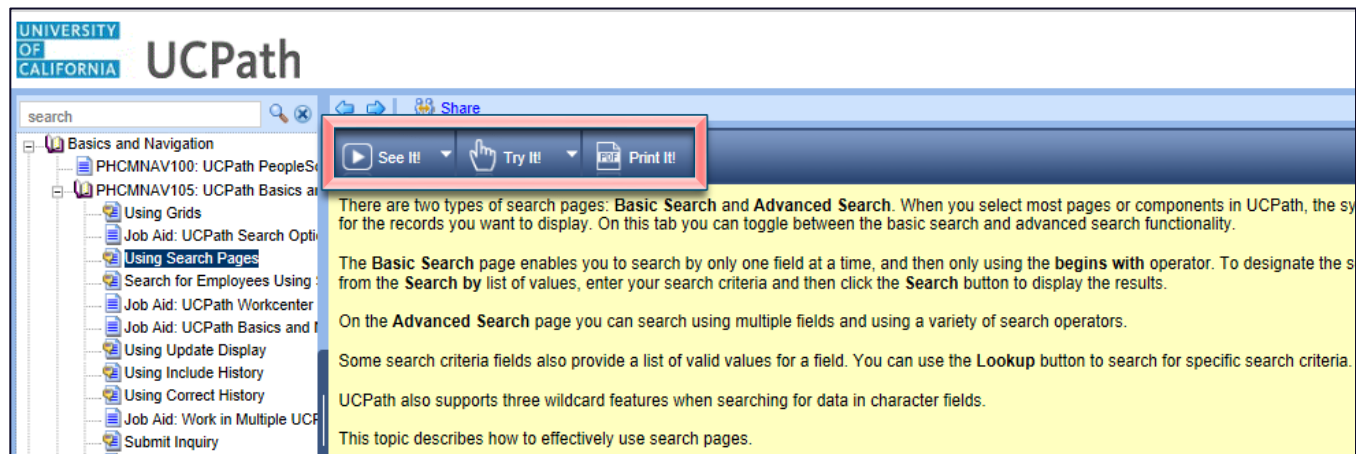
1. You can utilize the **Search** field at the top of the simulation library section to find simulation topics by typing in key words.

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.
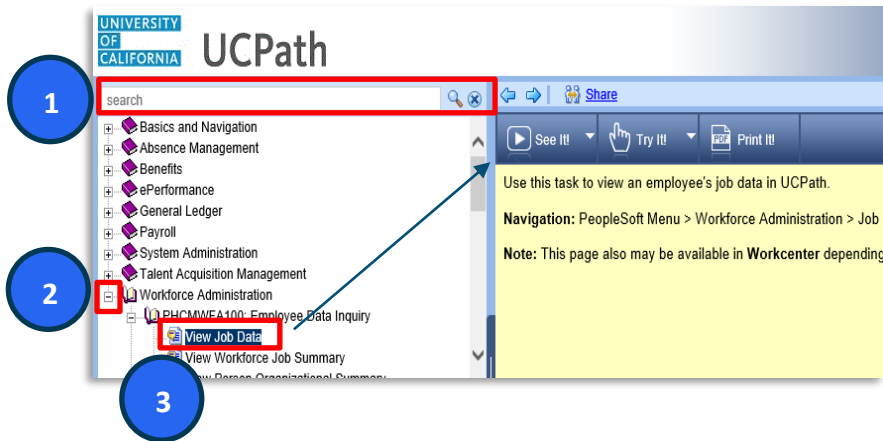
2.4 TRAINING ENVIRONMENT

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 a User ID and connect to the training environment. The document provides an explanation of each user role 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 training sessions with an instructor who can answer frequently asked questions, provide "lessons-learned", and provide troubleshooting techniques through scenario based training and 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.
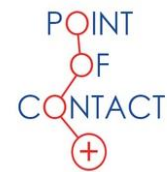
3.2 EMPLOYEE EXPERIENCE CENTER

The employee experience center is a one stop shop to find answers to frequently asked questions.

If you are unable to have your question answered by your designated point of contact, you can call or submit an online ticket with your question or concern to have it triaged and resolved.

3.2 DROP-IN SUPPORT CENTER (DISC)

The UCPath drop-in Support center is available for users that have immediate 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 provided and communicated on our UCI UCPath website weekly.

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

- All of the "Training Tips & Lessons Learned" Zoom session are recorded and archived on the website.

Please contact your manager or Point of Contact if you'd like to participate in weekly UCPath update calls or need assistance locating helpful documents.