UC PATH: REPORTING OPTIONS

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WELCOME to BFS Mini Tune-ups

OBJECTIVE:
Online meetings to provide campus staff with a high level perspective and information on both topics of interest and new/upcoming initiatives and policy updates.

PRINCIPLES:

• Sessions are conducted via Zoom and will last no longer than 30 minutes
• Participants will be muted during the session
• Chat questions can be submitted but priority will be given to questions submitted ahead of time at www.bfs.ucsb.edu/coaching
• The Mini Tune-up website will be updated with session details and information
UCPath Reporting Options

DISCUSSION TOPICS

• Reporting options available for PPS historical and UCPath data
• What reports should you review now
• What to do if you find errors or have questions
• Q&A
EZ Access will include data query options for:

- PPS Historical
- UCPath Employee
- UCPath Payroll
The two most important reports to review now:

1. Jobs by Group
2. UCPath Dist of Payroll Expenses
Jobs by Group Report

What you can do now:
Review to ensure employees converted to UCPath appropriately
Distribution of Payroll Expenses Report

What you can do now, and going forward:

Review to ensure employees are paid correctly

- 9/27 first MO
- 10/1 first BW
Functional User Support

Human Resources

Staff and Student Employees
– hrhelp.ucsb.edu (UCSBNetID login required)

Academic Employees
– Email: AP-Path@ucsb.edu

Payroll

BFS Payroll
– bfshelp.ucsb.edu (UCSBNetID login required)

“How To” Video - ServiceNow: Submitting an Off-Cycle Request
– https://www.bfs.ucsb.edu/payroll/ucpath/resources
Questions

Question:
Will the employee Position #'s be present on the new Payroll Ledgers? This would make reconciling Payroll to Kronos much easier since Kronos will now be displaying Position #'s and no longer displaying funding sources.
Question:
Will the same payroll and staffing data be available for querying from Espresso Suite Module "BLIS"? And if so, when will it be available?
Question: What existing Hyperion staffing reports will be available? and by when?
Question:
For our area we often times have to provide payroll backup for a particular account-fund, showing salary and benefit details by employee for a particular month. The EZ Access in DW had a nice report that did this. Will a monthly report by account-fund for employee payroll detail be available that is similar to the EZ Access DW reports used so heavily by campus? Can you demonstrate how this would be accomplished in the new system?
Question:
As a Hyperion user, I was wondering what are the options for an alternative reporting tool, as mentioned in yesterday's email. What applications are being considered for its replacement?
Question:
Will Data Warehouse reports upload to GUS for reconciliations as it's done in the past?
CLOSING - BFS Mini Tune-ups

NEXT STEPS:

Visit the Mini Tune-ups website to:
- View our session blog updates
- Sign up for future sessions and submit questions
- Submit suggestions for future topics

www.bfs.ucsb.edu/coaching
Thank You!

WRAP UP