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
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
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
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.

Answer:
Yes, the position numbers will be present on the new Payroll reports included under “UCPath Payroll Beta”.
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?

Answer:
We are looking into which tables are being used by BLIS, and how they are impacted by UCPath data. We do not yet have an estimate on availability.
Questions

Question:
What existing Hyperion staffing reports will be available? and by when?

Answer:
There is a new version of the Staffing report in EZAccess. Please contact datawarehouse@ucsb.edu if you’d like to test and provide feedback on the new version.
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?

Answer:
We are still in the process of determining which EZAccess reports will be retrofitted for UCPath. We have a starter set of reports under the UCPath Employee Beta and UCPath Payroll Beta menu options. We are also rolling out access to UCPath reports in Cognos in a series of waves, and many of these new reports replicate report functionality previously available via EZAccess reports. Please contact datawarehouse@ucsb.edu if you'd like to test and provide feedback on the new Cognos reports.
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?

Answer:
We are currently investigating these options, as well as considering the effort to convert or migrate existing queries, custom tables, custom reports, and other reporting assets.
Question:
Will Data Warehouse reports upload to GUS for reconciliations as it's done in the past?

Answer:
Yes it should. Please consult the GUS group or send an inquiry to datawarehouse@ucsb.edu.
Questions

Question:
UC Path Vac/Sic For BW are uploaded from 9/9. When will the upload be reflected from time reporting last BW accrual (9/24) for Vac/Sic?

Answer:
For biweekly employees, updated accrual balances are available on the UCPath portal after 5 pm every four weeks. There is a column on the UCPath Production Processing Schedule that indicates the dates accruals are available by pay cycle. According to the schedule, accrual updates through PPE 9-22 should have been visible in portal on 10-1. The next update on the UCPath portal is scheduled for 10-26 after 5 pm.

For monthly employees, updated accrual balances are typically available on the UCPath portal at the end of each month. The schedule may shift with holidays. Schedule noted on the UCPath Production Processing Schedule.
Question:
Not sure if changes in accruals were updated in PPS to be captured for UC Path. Staff EE on campus now for 10 years, will the upload reflect the increase in vac/sic accruals or should the dept. request to make a change in the apt for time reporting. If Dept. needs to process changes, do they also need to process retro to capture past vac/sic accrual or will UC Path make the changes?

Answer:
PPS was the system of record for accruals, not Kronos or paper timecards. PPS balances were used to load UCPath. If PPS was not up to date, departments need to make corrections. When determining if updates are needed, it is important to remember that monthly leave taken is uploaded a month late. Balance may be high by any leave taken in the prior month which is expected, okay, and should not be “fixed”.

Example: If a monthly salaried employee took vacation in September, the balance in UCPath portal updated on 9-28 does not include these takes. This starting balance for monthly employees will be high by any takes in September which needs to be factored into the validation process. This is the same as with PPS.
Question:
Will MO EE be able to see the new accrual update as of 10/1, or will the system be behind with accruals?

Answer:
See answer above. Current state and past state have not changed. Information on a monthly timecard was always entered after the month was over which is after pay compute (pay confirm in UCPath).
Question: When will Kronos match up with UC PATH? Will the accruals in Kronos match what is in UC PATH? If there is a discrepancy, how should we correct?

Answer: The processing hasn’t changed. The big difference is that employees can now see UCPath balances whereas they could not see PPS balances before.

ETS will be wrapping up the leave balance import project in the near future once payroll upload processing has stabilized. At the moment of import, balances will match. Kronos will continue to reduce balances as takes are applied real time whereas balances displayed on the UCPath portal are static until the next monthly update. When UCPath is updated again, the portal balances are recalculated considering any leave taken reported as well as earnings for the previous period. These calculated balances will be imported into Kronos for the next processing period.
Questions

Question:
Is there a place to check our own security level settings? We seem to not have edit access to the “add/update function”.

Answer:
You cannot check this yourself, but you can ask your Department Security Admin (DSA) or submit a ServiceNow technical issue ticket. Each department should have a copy of the security permissions requested for UCPath.
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