UCPath Projects: November Release

Topic Based Zoom

11/08/23
Today’s Topics

- Hire Pilot
- Salary Cost Transfer Redesign
- I-370 Web Service Validation of Chartstrings
Hire Pilot

What is the purpose?

• Phase 1 of the multi-year Hire Pilot project (local pilot release)
• New module will reduce data entry errors and overall processing time

Who will this impact?

• All current transactors with access to Smart HR Templates will continue to use the Smart HR Templates
• Early adopters from Central Offices will be able to transact using the new functionality before all transactors

What to expect

• If you currently have access to Smart HR Templates continue using until pilot phase is complete.
• Local leadership will determine the right opportunity to release the new functionality to all transactors

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Salary Cost Transfer Redesign

**What is the purpose?**

- Simplification of the salary cost transfer processes to improve user experience
- Address current deficiencies and defects using Direct Retro
- Increase frequency of SCT runs

**Who will this impact?**

- Transactors who perform salary cost transfers

**What to expect**

- Ability to move by earnings
- Consolidated entry page
  - No MCOP worksheet
  - Integrated Old Data and New Data sections
- Improved functionality of Work Study salary cost transfers
- Ability to save with/without Data Validation
Salary Cost Transfer Redesign

The new Salary Cost Transfer tool will be available Monday November 13, 2023

Current State

Direct Retro
Use to move Earnings by paycheck
• Salary Cap/MCOP Worksheet for Restricted Funds

Future State

Salary Cost Transfer (SCT)
Use to move Earnings by Earnings Period
• Earnings after October 3, 2021
• Earnings that never had DRs performed previously

Direct Retro
Use to move Earnings by Paycheck
• Earnings before October 4, 2021
• Earnings that had DRs performed previously

https://ucpath.ucsd.edu/transactors/projects/redesign/sct.html
## Direct Retro Tool vs Salary Cost Transfer (SCT) Tool

<table>
<thead>
<tr>
<th><strong>Direct Retro Tool</strong></th>
<th><strong>Salary Cost Transfer (SCT) Tool</strong></th>
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<tbody>
<tr>
<td>• Perform salary cost transfers by Paycheck</td>
<td>• Perform salary cost transfers by Earnings (except Work Study)</td>
</tr>
<tr>
<td>• Separate Old Data and New Data sections</td>
<td>• Combined Old Earnings, Adjustment Amount and New Earnings into each line</td>
</tr>
<tr>
<td>• Need to use Salary Cap/MCOP Worksheet for Restricted Funds</td>
<td>• The fields on the SCT page will change depending on the type of funding (Unrestricted, Restricted, Work Study)</td>
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<tr>
<td>• No ability to Save the Salary Cap/MCOP Worksheet</td>
<td>• Ability to Save with/without Data Validation</td>
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<tr>
<td></td>
<td>• Warning/Error Message</td>
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New Feature | Direct Retro Menu

Starting **Monday November 13, 2023**, two new menu items will be added to the Direct Retro folder:

- **Process Salary Cost Transfer** corresponds to the *Process Direct Retro* page
  - Use to enter salary cost transfers

- **Review Salary Cost Transfer** corresponds to the *Review Retro Distribution* page
  - Use to search SCT transactions
**New Feature | Search Fields**

- **Required Fields**
  - **Earnings End Date** will pull up all the earnings within the Earnings Period; **Pay End Date** will pull up all the earnings within the Paycheck Dates
  - **Empl ID** and select the correct **Empl Record**

- **Optional Fields**
  - **Earnings Code** if you only want to find a specific Earn Code
  - **Search FAU** if you want to find earnings charged to a specific chartstring
New Feature | Consolidated Transaction Entry Page

- Earnings are separated out by Earnings Periods (use the – button to remove any selected in error)
- Old Earnings and New Earnings amounts are displayed together on each line
New Feature | Consolidated Transaction Entry Page (Restricted Funds)

- When restricted funds are entered, the OTC indicator and Effort columns appear
- Calculate Cap Rules button will open up the Y-OTC rows for editing and lock the N-OTC rows
- Re-Distribute Eligible Earns button will open up the N-OTC rows for editing and lock the Y-OTC rows
  - Only one of these buttons are enabled at time
New Feature | Consolidated Transaction Entry Page (Work Study)

- Use the Work Study field to Apply Work-study, Leave as Is, Re-apply WS, and Remove WS on all lines
- Our location will not be using the Flexible Option
New Feature | Save with/without Validation

- Errors will not allow you to Submit
- Warnings are informational and you can Submit
- Highlights where the errors/warnings are
Salary Cost Transfer (SCT) Resources

Local Resources on Job Aids Page

- JOB AID - HOW TO SUBMIT A SALARY COST TRANSFER (UNRESTRICTED FUNDS).pdf
- JOB AID - HOW TO SUBMIT A SALARY COST TRANSFER (RESTRICTED FUNDS).pdf
- JOB AID - HOW TO SUBMIT A SALARY COST TRANSFER (WORK STUDY).pdf
- SCT Simulations: Unrestricted, Restricted, and Work Study

UCPC Resources available **Monday November 13, 2023** on UCPath Transactor Help Site

- Video: Direct Retro Salary Cost Transfer Change
- Job Aid: SCT Unrestricted Funds
- Job Aid: SCT Restricted Funds
- Job Aid: SCT Work Study Funds
- Job Aid: Approve Salary Cost Transfers
- UPK: Enter a Salary Cost Transfer for Unrestricted Funds
- UPK: Enter a Salary Cost Transfer for Restricted Funds
- UPK: Enter a Salary Cost Transfer for Work Study Funds – Apply WS
- UPK: Enter a Salary Cost Transfers for Work Study Funds - Leave As Is
- UPK: Enter Direct Retro Funding Update
- UPK: Enter Direct Retro Funding Update – MCOP
I-370 Web Service Validation of Chartstrings

What is the purpose?
• To allow OFC to validate chartstrings

Who will this impact?
• Transactors who enter funding or cost transfers in UCPath

What to expect
• Real time chartstring validation
• New error messages
• Resources to troubleshoot error messages

Resources:
KBA: Troubleshooting UCPath Chartstring Validation Errors in OFC
Preparing for the Changes

Before Go-Live

• Be aware that all pending DR and FE transactions not approved by Friday, Nov 3 will be cancelled
• Review the project spaces and project demos
• Subscribe to our local UCPath communications

UCPath System Downtime

• The UCPath General Ledger will be UNAVAILABLE from Monday, November 6, 12:01 am to Monday, November 13, 12:01 am
• During the downtime, employees, managers, and transactors will not have access to any UCPath General Ledger pages, and will not be able to submit any Direct Retros or Funding Entries

Post Go-Live Support

• All changes are targeted to go-live on Monday, November 13
• Bring any questions you have to our November Release Office Hours
• Important project updates will be shared via UCPath Alerts
Local Resources | UCPath Project November Release

The UCPath November Release Project Space contains links to resources within the expandable drawers.

https://ucpath.ucsd.edu/
Notes

- Will the approvals show in the same worklist as DR? It should show up in your worklist if you are an approver for that transaction. You should also receive an email notification. You can also see a list of SCT transactions and the transaction status in the Review Salary Cost Transfer page.

- How long will it take for new project numbers (COA) to be updated in UCPath? After an update is completed in Oracle, updates to associated systems may take 2 days/night to transfer. Refer to KBA: UCPath Funding FAQ for more information on troubleshooting combination/chartstring issues in UCPath.

- When is it anticipated for the hire pilot phase to end? We will send out communications as local leadership determines the right opportunity to release this new module to all transactors. Subscribe to our local UCPath communications.

- What about High Risk DRs that were approved by the department but not by SPF? ALL High-Risk Direct Retros must have been approved at the department level by Tuesday, October 31, 2023 at 11:59 pm. Any transaction approved after this date might not be approved by SPF and will be cancelled.

- Do you have more information on how chartstring validation works? Does it lookup the COA elements from the project-task? If a Project-Task is entered the system will only validate the Project, Task and Funding Source so be super careful that the rest of the chartstring segments are correct before submitting. For more information refer to the new KBA: Troubleshooting UCPath Chartstring Validation Errors in OFC.
Notes

• will the validation process also address incomplete chart strings used with new hires in UCPath? We continue to have new employees post to the default due to HR entering incomplete chart strings in UCPath, an example is the project number is not added to UCPath so the employee bounces to project 0. If there is no Project-Task-FundingSource (PTF) entered then the system will validate the whole chartstring and you will receive the new chartstring validation error messages. If you enter PTF then the system will only validate the PTF and you will receive the new chartstring validation error messages if there are errors with the PTF entered. Refer to KBA: UCPath Funding FAQ for more information on troubleshooting combination/chartstring issues in UCPath.

• It would be helpful if you can demo? Is there a recording of what it will look like, where approvers go to approve, etc? Check out the SCT Simulations: Unrestricted, Restricted, and Work Study.

• Will specific training be provided, or will we rely on Job Aids, KBAs, and Office Hours for learning? Come to the Salary Cost Transfer Topic Based Zoom, next Wednesday: https://ucpath.ucsd.edu/transactors/projects/redesign/sct.html#Mark-your-calendars:-Using-the-

• This topic based zoom will go over how to use the new salary cost transfer tool in UCPath: Searching and Entering SCTs (Unrestricted, Restricted, Work Study), and Finding & Approving SCTs. If you can’t attend live then the recordings/ppt will be posted on our Review & Reinforcements page.
Simulations and Job Aids for SCT also available on the November Release Project Space: [https://ucpath.ucsd.edu/transactors/projects/redesign/sct.html#Resources-&-Useful-Links](https://ucpath.ucsd.edu/transactors/projects/redesign/sct.html#Resources-&-Useful-Links)

Will using combo codes generate a OTC # number for faculty on capped funds? **When you enter a capped fund then you will be able to click the Calculate Cap Rule to update the OTC-Y rows**

Will the FAU search pull up all people on a given FAU, or do you also have to enter a person? If it pulls up everyone, can we submit SCT for multiple people on one transaction, or does it still need to be by person? The Empl ID and Empl Rec are required fields. You can enter a chartstring segment such as Project to pull up all earnings charged for this employee on that Project. Come to the Topic Based Zoom next Wednesday or check out the simulation to see how that works!

Cost transfers for students on work study will we still need to put in a ticket or will be able to change funding on the department portion? **Check out the new Job Aid How to Submit a Salary Cost Transfer (Work-Study) to see the steps on Corrections to Department Funding Source Only (Work Study Split was applied)**

Is there a demo/video for DRs, Funding Entries, Extended Fund, Cost transfers, etc. Check out UCPC’s Video: [Direct Retro Salary Cost Transfer Change](https://ucpath.ucsd.edu)

For the search by FAU, is there a way to search by combo code as a shortcut. **No but you can search by a particular chartstring segment for example Project**