UCPath Upgrade – Guidance & Instructions for Department Transactors

In mid-December, UCPath will be upgraded from Oracle Peoplesoft version 17 to 37. It is highly recommended that locations clear all transactions pending local approval, prior to this upgrade. Currently, UC San Diego has over **2,000** transactions pending, some sitting for months and some even for over a year.

VC Area Contacts were given a report of 'transactions pending approval' to distribute to applicable departments. Department HR and Funding Approvers should determine if the transactions are still valid by reviewing them in UCPath (see table below for detailed steps).
- VALID - Click APPROVE
- NOT VALID - Type "Abandoned transaction" in UCPath Approver Comment box and click DENY

NOTE: Many of the pending transactions were likely a result of the transition to UCPath in 2020 when business processes and procedures were brand new. Going forward, however, the expectation is that departments will continue to improve their internal processes to ensure timely approvals. ***The best practice and our location expectation: Transactions should be locally approved/denied within three business days.***

Transaction Type	Navigation from the Main PeopleSoft Menu	Transaction Search Info (Column I – Transaction ID)	Action Choices
Extended Absence	Global Payroll & Absence Mgmt → Payee Data → Maintain Absence → UC Customizations → Administer Extended Absence	Enter Transaction #	Approve or Deny
Fund Entry	Set Up HCM → Product Related → Commitment Accounting → UC Customizations → Fund Entry	Enter Request ID (starts with FE). Delete value in Fiscal Year field, then click Search	Approve or Deny
Manage Accruals	UC Customizations → UC Extensions → Self-Service Transaction Links	Click Approve on the main page, then Enter Transaction ID (starts with M)	Approve or Deny
One-Time Pay	UC Customizations → UC Extensions → Self-Service Transaction Links	Click Approve on the main page, then Enter Transaction ID (starts with OTP)	Approve or Deny
PayPath Actions	ACADEMIC ACTIONS - https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/UC_EXTENSIONS.UC_E102_ACAD_ACTNS.GBL?Folder=MYFAVORITES STAFF ACTIONS – https://ucpath.universityofcalifornia.edu/peoplesoft-native/EMPLOYEE/HRMS/c/UC_EXTENSIONS.UC_E102_STAF_ACTNS.GBL?Folder=MYFAVORITES	Click on link, then Enter Transaction ID (starts with P)	Approve or Deny
Payroll Request	UC Customizations → UC Extensions → Self-Service Transaction Links	Click Approve on the main page, then Enter Transaction ID (starts with PR)	Approve or Deny
Person Profile	Manager Self Service → Review Transactions	Click on transaction pending review	Approve or Deny
Salary Cost Transfer (Direct Retro)	Payroll for North America → Payroll Distribution → UC Customizations → Process Direct Retro	Enter Transaction ID (starts with DR)	Approve or Deny
HR Templates (Hire, Term, etc.)	Workforce Administration → Smart HR Template → Transaction Status	In HR Review Status box, select Pending (with start dates 5/1/2020 – today)	Approve or Deny