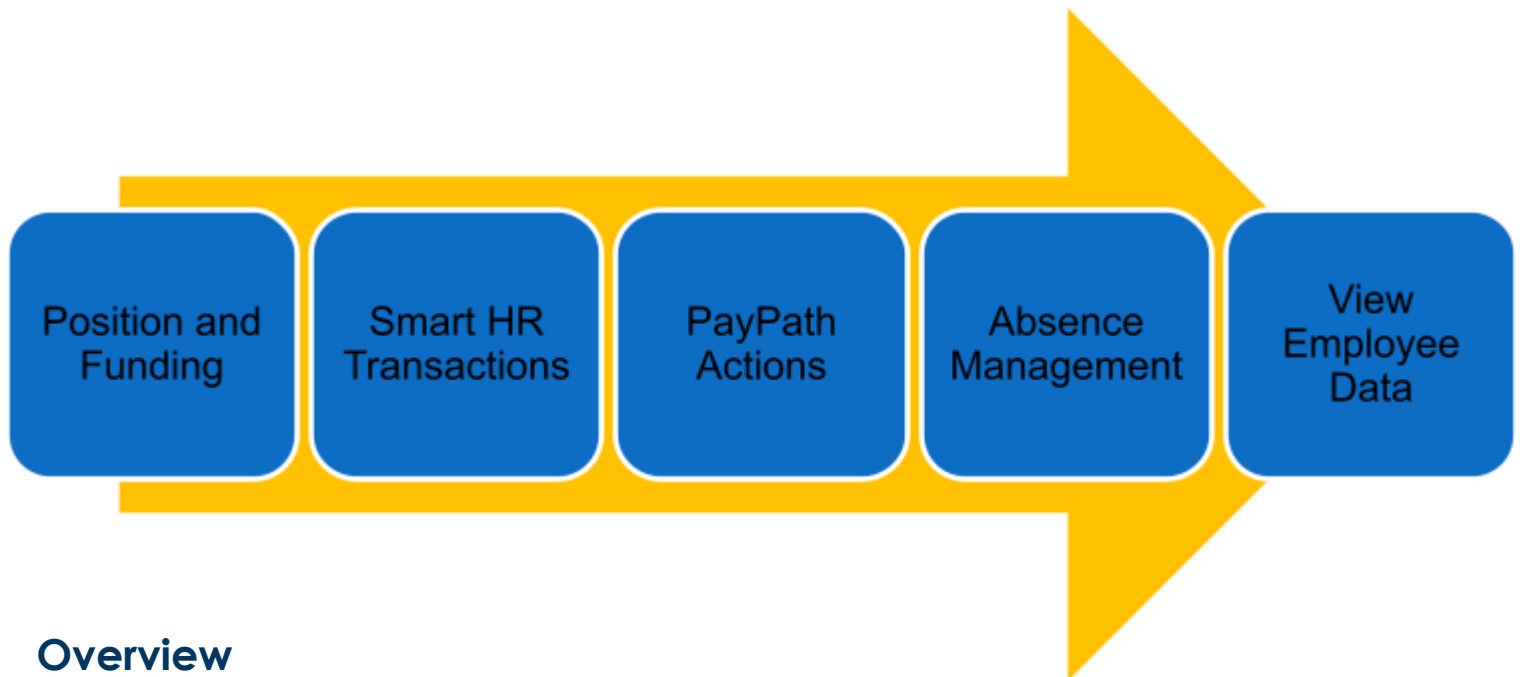


Job Aid: Transaction Lifecycle



Overview

Department Position Control Initiators use the **Position Control Request** page to request that a position be added (or to update a vacant position) for Staff and Academic Students ONLY in UCPath. Non student academic positions, Position Control Requests is done In APO.

After the position request is entered and saved, the transaction request is automatically routed to the appropriate person for approval via AWE.

After the Position Control Request is approved and the Position Number is created, funding can be entered for the position. The funding entry is also routed for approval.

Department Template Initiators use the **Smart HR Transactions** page to initiate HR transactions using templates in UCPath. These transactions are routed to the appropriate person for approval. Once the transaction has been approved, the transaction is routed to UCPC WFA Production. The WFA Production team reviews each template transaction and then processes the data. When the transaction is processed, the data is saved in UCPath.

Department PayPath Initiators use the **PayPath Actions** page to initiate various position, job data and additional pay changes. PayPath transactions are not reviewed by UCPC WFA Production. After the Department approval process is complete, the change is saved in UCPath.

Leave Administrators submit extended leave of absence requests on behalf of employees. Leave of absence requests are submitted for various paid and unpaid types of leave. When a Leave Administrator submits a leave request in UCPath, it automatically routes to the appropriate Approvers. When the request is approved, the transaction is routed to UCPC WFA Production for verification and

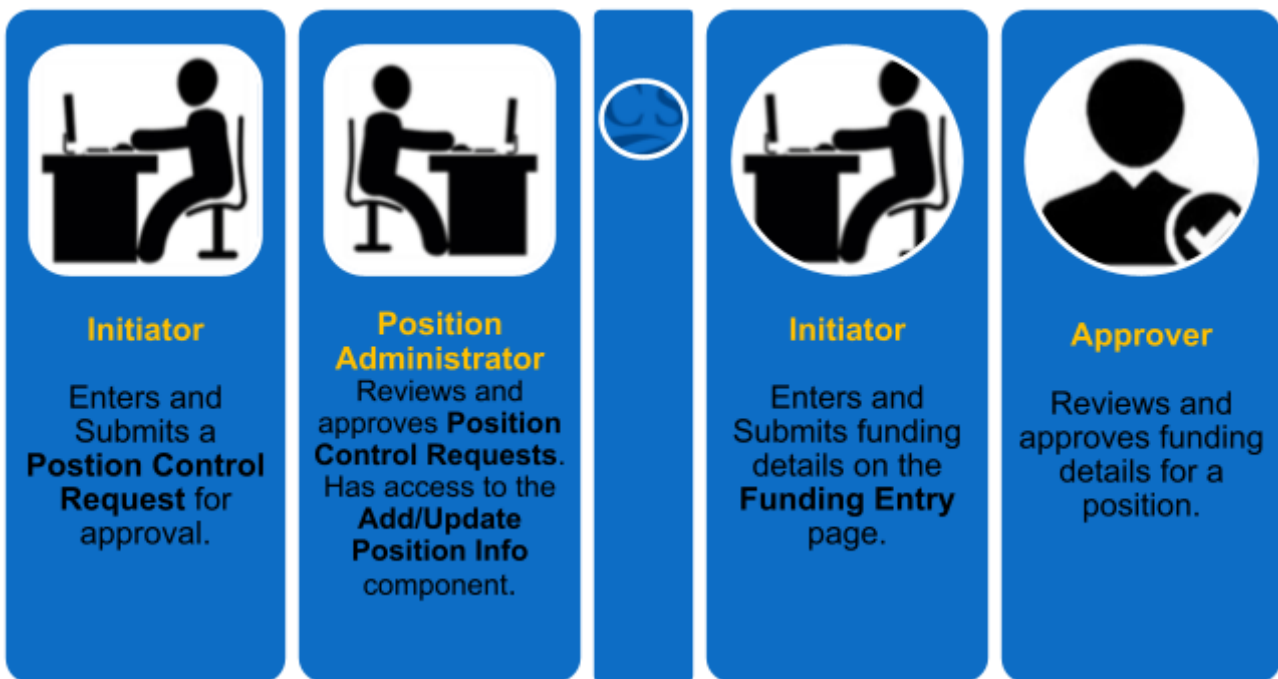
Job Aid: Transaction Lifecycle

can either approve the request, deny it or push it back to the Location Leave Administrator for edits. If UCPC WFA Production approves the request, the employee's Job Data is updated with the leave information.

At any time during the lifecycle of any transaction, Departments have access to view Employee Data. UCPath stores historical data on every change and updates that are entered for each employee.

Position

Funding



Overview

◆ Position

A Department Position Initiator uses the **Position Control Request** component to request new positions or changes to existing vacant positions. They also have view-only access to **Add/Update Position Info** component.

Position Administrators approve or deny Position Control Requests submitted via the AWE. Position Administrators use the **Add/Update Position Info** component to update existing multi-headcount positions. Position Administrators do not have correction mode. Corrections are completed by the UCPath Center (UCPC) WFA team. Position Administrators also have access to submit **Position Control Requests**.

Some users may have the Initiator and Approver role in UCPath; however, AWE has built in rules so that Initiators cannot approve their own transactions.

Job Aid: Transaction Lifecycle

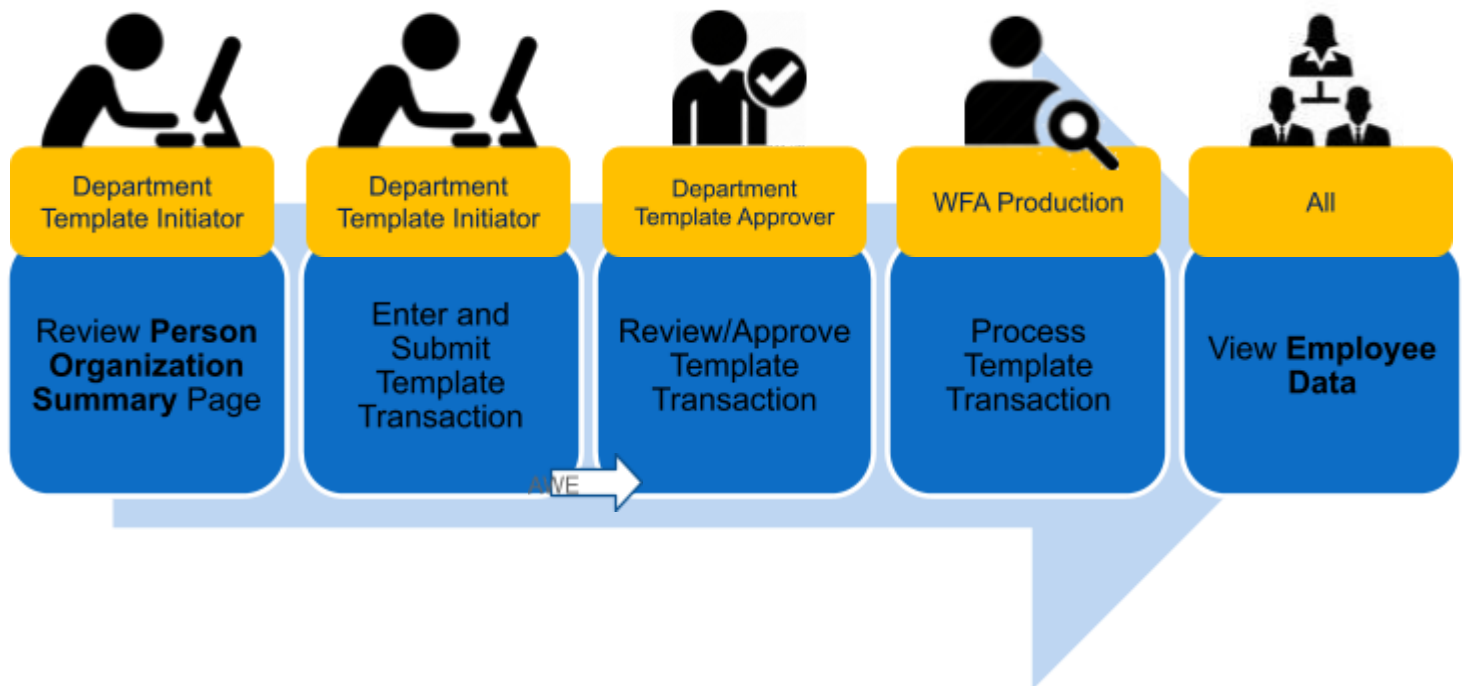
♦ Funding

Departments use the **Funding Entry** page to enter new and update existing funding. This page displays each Department's specific chart of accounts configuration.

Submitting a transaction triggers approval workflow (AWE) at the Department level and upon final approval, UCPath saves the data to the Department Budget tables

Job Aid: Transaction Lifecycle

Smart HR Template Transaction



Overview

The Department Template Initiator reviews the **Person Organization Summary** page before initiating a template transaction. This page provides the status of the employee's current assignments. If you are initiating a full hire template, you should use this page to validate that the person does not already exist in UCPath. You can also use the **Workforce Job Summary** page. **NOTE:** Always check to confirm which page is better to use.

Department Template Initiators use the **Smart HR Transactions** page to initiate HR Transactions such as Hire, Rehire, and Concurrent Hire, Transfers, Terminations, adding Contingent Workers, Retire and Personal Data updates. The templates are configured to support the update of the appropriate UCPath component or page, such as **Job Data**, **Personal Data**, **Person Profile** and **Additional Pay**.

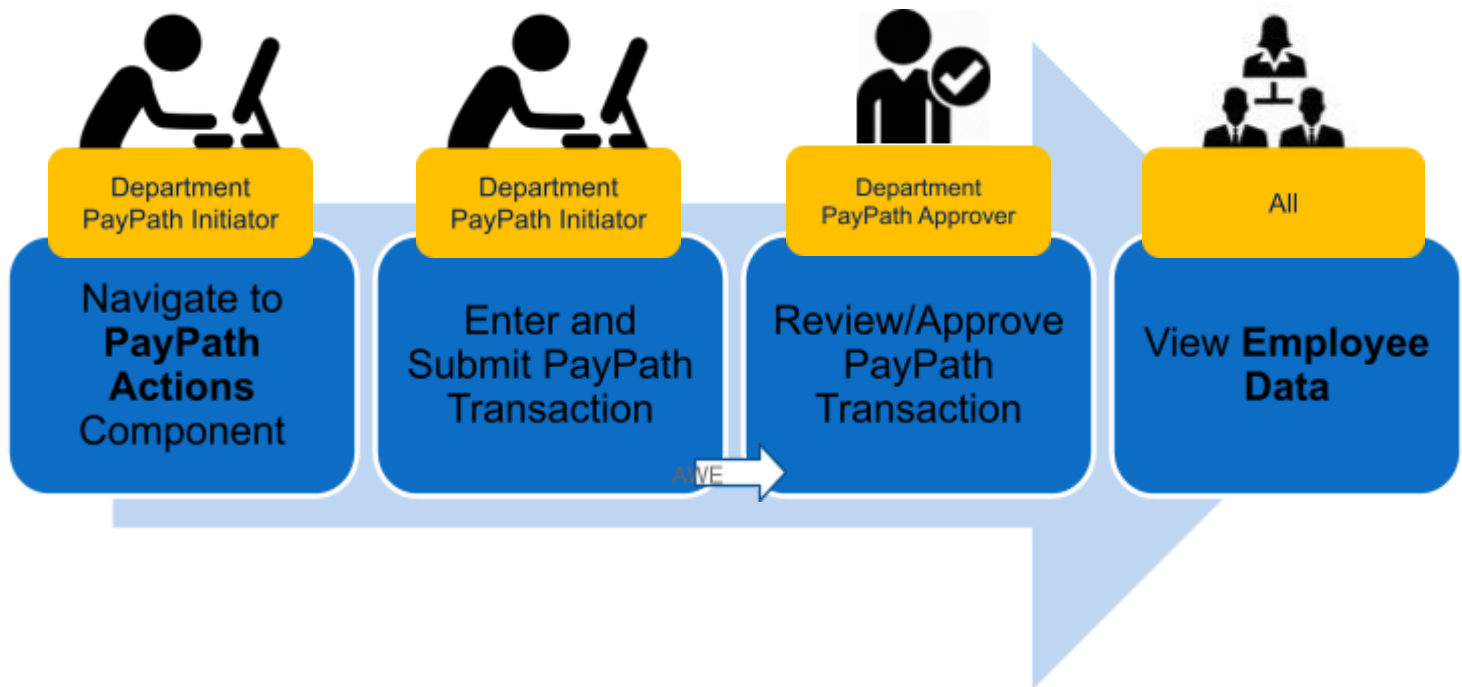
After a transaction is initiated, the transaction is automatically routed to the designated Department Approver for review. The first Approver can approve or deny the template transaction. If there is more than one Approver, the option to push back also becomes available for those additional Approvers. Pushback sends the transaction back to the previous Approver in the routing.

Job Aid: Transaction Lifecycle

Approved template transactions are available for processing by WFA Production at UCPath Center. The WFA Production team reviews each template transaction and then processes the data. When the transaction is processed, the data is saved in UCPath.

Once the template transactions have been processed and saved in UCPath, the transaction can be reviewed. There are multiple pages where you can view employee data.

PayPath Actions



Overview

The first step is for the Department PayPath Initiator to navigate to the **PayPath Actions** component, search for the employee and review the current employee information. You also can access the **Workforce Job Summary** or **Person Organization Summary** pages directly from **PayPath Actions** to gain an understanding of the employee's assignments.

Next, the Department PayPath Initiator enters the PayPath transaction. After the Initiator saves and submits the transaction, it is automatically routed for approval using Approval Workflow Engine (AWE).

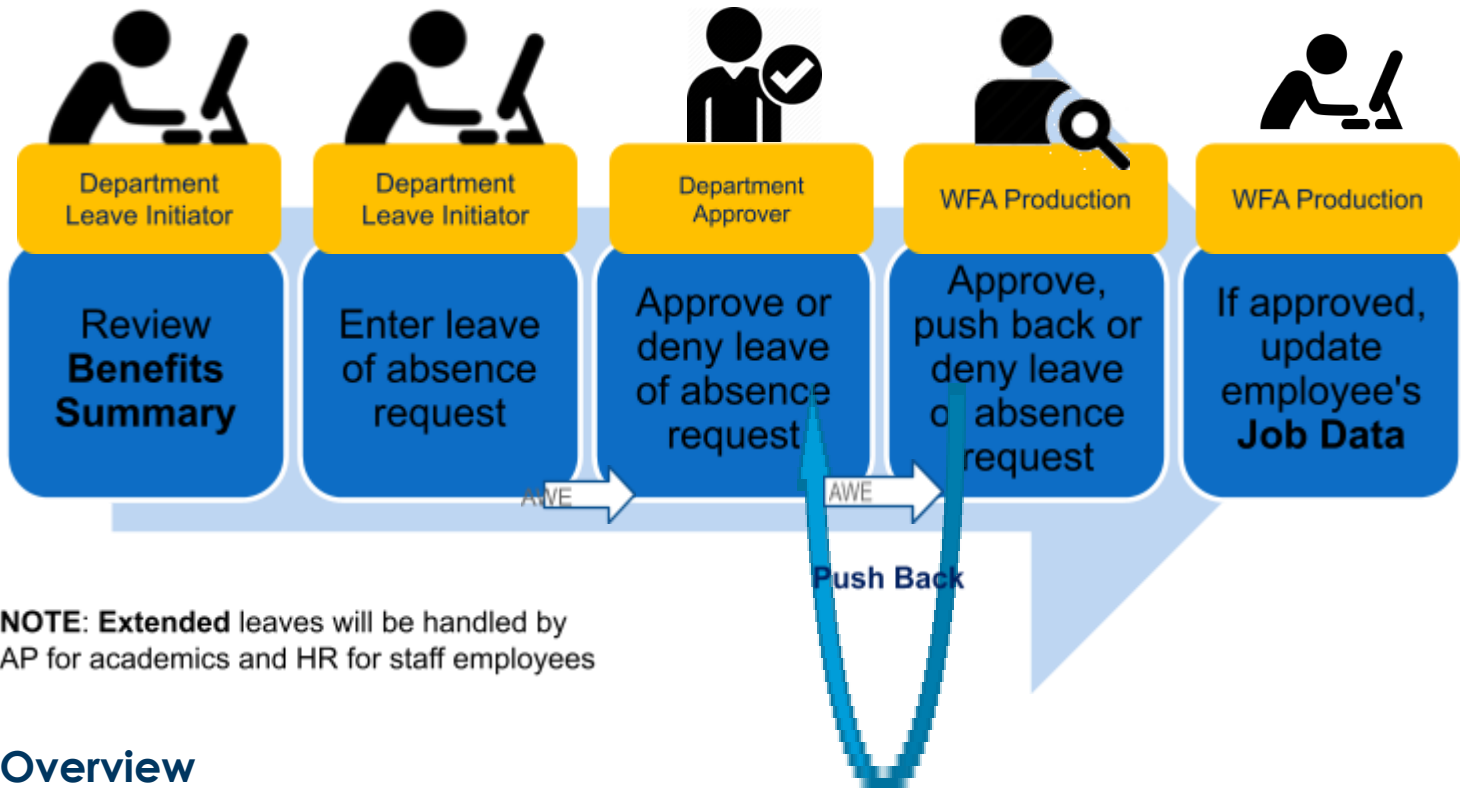
Then, a designated Department PayPath Approver reviews and, if applicable, approves the transaction. After approval of PayPath transactions, the system saves the information directly to the appropriate UCPath tables.

Job Aid: Transaction Lifecycle

After the information is saved to the UCPath tables, the employee data can be viewed in UCPath; typically using the **PayPath Actions** component and the **Workforce Job Summary** page.

Job Aid: Transaction Lifecycle

Absence Management



NOTE: Extended leaves will be handled by AP for academics and HR for staff employees

Overview

Leave Initiators submit extended leave of absence requests on behalf of employees. Leave of absence requests are submitted for various paid and unpaid types of leave.

When a Department receives a leave request from an employee, the Department Leave Initiator reviews **Benefit Summary** information with the employee.

When a Department submits an absence request in UCPath, it automatically routes to the appropriate Approvers using Approval Workflow Engine (AWE). AWE is triggered any time a new absence request or a change to an existing absence request is submitted by a Leave Initiator.

Once a leave request has been approved at the Department level, the transaction is routed to the UC Path Center for review and approval. If the request is approved, the WFA Production team enters the leave details into the employee's **Job Data**.

UCPC WFA Production team places all of an employee's active **Empl Record(s)** across all Business Units on the same leave of absence unless otherwise indicated in the absence request.

Job Aid: Transaction Lifecycle

View Employee Data



Overview

There are several pages you can access to view employee personal and job data. Reference the *Job Aid: UCPATH Workforce Administration Employee Data Inquiry* in the UCPATH Help site to view the list of pages you can access.

Link: https://sp.ucop.edu/sites/ucpathhelp/Pilot_Location/LOCplayer/data/toc.html