UCP-Campus-GL Inquiry (Requires Training)

Grant Approval

Additional approvers for this role include:

1. HR Departmental DSA-Approver01

Role Description

Users in this role can view commitment accounting information for position funding and cost transfer status.

Benefit Cost Transfer:

User has view-only ability. Can see the transfer of an employee's benefit costs from funding sources or accounts.

Budget Inquiry:

View position and budget distribution data.

Direct Retro Inquiry:

Inquiry role for Direct Retro Transactions.

Funding Inquiry:

View approved and saved funding transactions.

Work Study Inquiry:

Inquiry access to the Work Study Award table.

Patent Inquiry:

Ability to verify which version of the Patent Acknowledgment employees have signed, if they have signed the e-Patent Amendment (data ported over from AYS), if they have signed a modified Patent Acknowledgment that can be accessed through the UCPath document repository, look at an individual's history of signing these documents to know which is applicable to an invention disclosure based on the date, etc..

Person Org Summary:

Inquiry Role that allows the user to look up people across the entire UC System. User can view the Person Organizational Summary, which does not have any Row-Level Security.

Role Risks and Requisites

Requisites

- **KSAMS role of UCP-Campus-Department Level Security is required with appropriate HR Department Code**
- User is authorized to view employee's benefits and financial data.

Training Requirements for This Role

Register for courses at UCLC.

R=Required, O= Reccomended

	Online Pre-Requisite Training	UCP – Campus GL Inquiry
1	**UCP101:** Intro to UCPath	R
2	**POS101:** Intro to Position Mgmt.	R
3	**FIN101:** Intro to Position Funding	R
4	**TEM101:** Intro to Smart HR Templates	O
5	**PPA101:** Intro to PayPath Actions	O
	Virtual Instructor Led Training Bootcamp	UCP – Campus GL Inquiry
6	***POS202:** UCPath Nav & Position Control	O
7	***FIN202:** Position Funding Entry	R
8	**Lived Name Recording**	O
9	***TEM301:** Template Transactions Pt. 1	O

	Online Pre-Requisite Training	UCP – Campus GL Inquiry
10	*TEM302: Template Transactions Pt. 2	O
11	*PPA310: PayPath Actions Pt. 1	O
12	*PPA320: PayPath Actions Pt. 2	O
13	*PRQ301: Payroll Requests	O
14	*ABM320: Absence Mgmt.	O
15	*DRD301: Direct Retro	O
16	*BDP100: Budget Distribution	R

Access Level

Review current and historical rows.

KSAMS Role Details

Business Process Guides (BPG)	All GL BPGs
Role Type	Reporter/Reviewer

UCP-Campus-General Ledger Approver (Requires Training)

Grant Approval

Additional approvers for this role include:

1. HR Departmental DSA-Approver01
2. UCPath Security Administrator-Approver02

Role Description

Benefit Cost Transfer:

Benefit Cost Transfer definition is pending.

Direct Retro:

Initiate Direct Retro Transactions (Trigger AWE).

Funding Entry:

Initiate Funding Entry Transactions (Trigger AWE).

Person Org Summary:

Inquiry Role that allows the user to look up people across the entire UC System. This role enables the user to view the Person Organizational Summary, which does not have any Row Level Security. This Role was created per PMO-4524.

Role Risks and Requisites

Requisites

- **KSAMS role of UCP-Campus-Department Level Security is required with appropriate HR Department Code**
- Deep understanding of funding sources and account (ChartFields) is required.

Training Requirements for This Role

Register for courses at UCLC.

R=Required,

O= Recommended

	Online Pre-Requisite Training	UCP – Campus GL Approver
1	UCP101: Intro to UCPath	R
2	POS101: Intro to Position Mgmt.	R
3	FIN101: Intro to Position Funding	R
4	TEM101: Intro to Smart HR Templates	R
5	PPA101: Intro to PayPath Actions	R
	Virtual Instructor Led Training Bootcamp	UCP – Campus GL Approver
6	*POS202: UCPath Nav & Position Control	R
7	*FIN202: Position Funding Entry	R
8	Lived Name Recording	O
9	*TEM301: Template Transactions Pt. 1	O
10	*TEM302: Template Transactions Pt. 2	O
11	*PPA310: PayPath Actions Pt. 1	R
12	*PPA320: PayPath Actions Pt. 2	O
13	*PRQ301: Payroll Requests	R
14	*ABM320: Absence Mgmt.	O

	Online Pre-Requisite Training	UCP – Campus GL Approver
15	*DRD301: Direct Retro	R
16	*BDP100: Budget Distribution	R

Access Level

Update current and historical rows

KSAMS Role Details

Business Process Guides (BPG)	GL.50,.52,.53,.09 and GL.02
Role Type	Transaction approver

UCP-Campus-Cost Transfers Initiator (Requires Training)

Grant Approval

Additional approvers for this role include:

1. HR Departmental DSA-Approver01
2. UCPath Security Administrator-Approver02

Role Description

- Cost Transfer Initiator-Role allows user to initiate a transfer of costs of an employee from one funding source to another funding source. User can distribute or redistribute benefits costs over one or more funding sources.
- Initiate Direct Retro Transactions (Trigger AWE). User can initiate a retroactive funding distribution for salary cost transfers (SCTs).
- Cost Transfer Inquiry-User can inquire current funding distribution for benefits costs or salary expenses.
- Inquiry role for Direct Retro Transactions-User can inquire status for direct retroactive salary costs transferred in the past.

Role Risks and Requisites

Risks

- User can transfer costs to incorrect funding sources causing misstatement of financial statements that can also impact budgeting.

Requisites

- **KSAMS role of UCP-Campus-Department Level Security is required with appropriate HR Department Code**
- User training and familiarity with FAUs required for funding redistribution.

Training Requirements for This Role

Register for courses at UCLC.

R=Required,

O= Recommended

	Online Pre-Requisite Training	UCP - Campus Cost Transfer Initiator
1	**UCP101:** **Intro to UCPath**	R
2	**POS101:** **Intro to Position Mgmt.**	R
3	**FIN101:** **Intro to Position Funding**	R
4	**TEM101:** **Intro to Smart HR Templates**	O
5	**PPA101:** **Intro to PayPath Actions**	O
	Virtual Instructor Led Training Bootcamp	UCP - Campus Cost Transfer Initiator
6	***POS202:** **UCPath Nav & Position Control**	R
7	***FIN202:** **Position Funding Entry**	R
8	**Lived Name Recording**	O
9	***TEM301:** **Template Transactions Pt. 1**	O
10	***TEM302:** **Template Transactions Pt. 2**	O
11	***PPA310:** **PayPath Actions Pt. 1**	O
12	***PPA320:** **PayPath Actions Pt. 2**	O
13	***PRQ301:** **Payroll Requests**	O
14	***ABM320:** **Absence Mgmt.**	O

	Online Pre-Requisite Training	UCP - Campus Cost Transfer Initiator
15	*DRD301: Direct Retro	R
16	*BDP100: Budget Distribution	O

Access Level

Update current and historical rows

KSAMS Role Details

Business Process Guides (BPG)	GL.02, GL.51
Role Type	Transactions initiator

See Similar roles

Filter by label

There is no content with the specified labels

UCP-Campus-Budget Entry (Requires Training)

Grant Approval

Users who are in these roles can approve an addition or removal of this role.

1. HR Departmental DSA-Approver01
2. UCPath Security Administrator-Approver02

Role Description

BUDGET ENTRY

Maintain budget distribution data.

User should most likely be assigned Funding Inquiry Role as well.

BUDGET INQUIRY

View position and budget distribution data.

FUNDING INQUIRY

View approved and saved funding transactions.

PERSON ORG SUMMARY

Inquiry Role to view Person Organizational Summary which does not have any Row Level Security. It allows users to look up people across the entire UC System.

This Role was created per PMO-4524.

Role Risks & Requisites

Risks

- User who is not familiar with the setup of budgets can make erroneous entry leading to incorrect reporting of budget available against payroll expenses to be encumbered for the year.
- Could impact entire year of budget setup.
- Inaccurate forecasting and financial planning.

Requisites

- **KSAMS role of UCP-Campus-Department Level Security is required with appropriate HR Department Code**

Training Requirements for This Role

NOTE: To get this role, required training courses must be completed in
UCLC.. Training materials on the UCPath website are for reference and review.

		R=Required, O= Recommended
	Online Pre-Requisite Training	**UCP - Campus Budget Entry**
1	UCP101: Intro to UCPath	R
2	POS101: Intro to Position Mgmt.	R
3	FIN101: Intro to Position Funding	R
4	TEM101: Intro to Smart HR Templates	O
5	PPA101: Intro to PayPath Actions	O
	Virtual Instructor Led Training Bootcamp	**UCP - Campus Budget Entry**
6	*POS202: UCPath Nav & Position Control	O
7	*FIN202: Position Funding Entry	R
8	Lived Name Recording	O
9	*TEM301: Template Transactions Pt. 1	O
10	*TEM302: Template Transactions Pt. 2	O
11	*PPA310: PayPath Actions Pt. 1	O
12	*PPA320: PayPath Actions Pt. 2	O
13	*PRQ301: Payroll Requests	O
14	*ABM320: Absence Mgmt.	O
15	*DRD301: Direct Retro	O
16	*BDP100: Budget Distribution	R

Access Level

View/Display Only for funding distribution.

Add, update current of historical row for budget distribution data.

UCP-Campus-Funding Initiator (Requires Training)

Grant Approval

Additional approvers for this role include:

1. HR Departmental DSA-Approver01
2. UCPath Security Administrator-Approver02

Role Description

Funding Entry Initiator:

Initiate Funding Entry Transactions (Trigger AWE).

Budget Entry:

Maintain budget distribution data.

Budget Inquiry:

View position and budget distribution data.

Funding Inquiry:

View approved and saved funding transactions.

Work Study Inquiry:

Inquiry access to the Work Study Award table.

Person Org Summary:

Inquiry Role allows users to look up people across the entire UC System. It allows the user to view the Person Organizational Summary, which does not have any Row-Level Security.

Role Risks and Requisites

Risks

- Lack of deep familiarity of funding sources and accounts could result in incorrect financial reporting.

Requisites

- **KSAMS role of UCP-Campus-Department Level Security is required with appropriate HR Department Code**
- GL Training.

Training Requirements for This Role

Register for courses at [UCLC](#).

R=Required,

O= Recommended

	Online Pre-Requisite Training	UCP - Campus Funding Initiator
1	UCP101: Intro to UCPath	R
2	POS101: Intro to Position Mgmt.	R
3	FIN101: Intro to Position Funding	R
4	TEM101: Intro to Smart HR Templates	R
5	PPA101: Intro to PayPath Actions	R
	Virtual Instructor Led Training Bootcamp	UCP - Campus Funding Initiator
6	*POS202: UCPath Nav & Position Control	R
7	*FIN202: Position Funding Entry	R
8	Lived Name Recording	O
9	*TEM301: Template Transactions Pt. 1	O
10	*TEM302: Template Transactions Pt. 2	O

	Online Pre-Requisite Training	UCP - Campus Funding Initiator
11	*PPA310: PayPath Actions Pt. 1	R
12	*PPA320: PayPath Actions Pt. 2	O
13	*PRQ301: Payroll Requests	R
14	*ABM320: Absence Mgmt.	O
15	*DRD301: Direct Retro	O
16	*BDP100: Budget Distribution	R

Access Level

Update current and historical rows.

KSAMS Role Details

Business Process Guides (BPG)	GL.50 Funding Entry.
Role Type	Transaction initiator and processor.