This training will consist of an overview of the new universe.
New universe called UC Path Employment – Daily. It has a very different structure from PPS – not Daily & Monthly datasets, all 1, consisting of active employees (employed on or before approximately 12/1/19).

Folders in the universe are Position, Employee, Job and Salary and Benefit Expenses (or Labor Ledger) associated with UC operations.

UC Path Employment – Daily is the new universe that provides access to the UCPath system. This new data model replaces the previous PPS universe and contains NONE of the tables or objects that were included in the PPS universe. That being said, you may not find a direct 1 to 1 correlation of PPS objects or structures to the UCPath objects and structures. There will, in most cases, be a functional equivalent of all the basics brought forward to the new system.

Additionally, another key consideration for any universe is how current is the data provided by the universe. Data in Salary and Benefit Expenses will be updated 2-3 days after each pay confirm. Salary cost transfers (Direct Retros) will update Salary and Benefit Expenses the night they are approved (except for pay confirm nights).
Position data is where it all starts – this maintains the positions for each department – an occupied or empty chair- sound familiar? Based on the definition in the data model the Position data is a lookup containing information for position management.

Positions are effective dated and each position has unique position number. Positions include features such as the jobcode, Bargaining Unit, FLSA Status, salary plan, salary grade and UC employee relation code. All Position features carry over to the corresponding Job associated with a given position.

Updates for positions are entered by local HR Representatives (SHR/AHR) depending on the type of employees.

Positions allow departments to define jobs. Funding Entry, and Work Study Eligibility are established in UCPath at the position level. You can now see the Job code (formerly Job Title Code in PPS), location, FTE, benefits for the position, salary plan/grade, as well as to whom the job reports to – which didn’t exist in PPS. Positions can be active or inactive. Active positions can be hired into.
There are 7 choices for the Employee Status or ‘J Empl Status’ (in the Job folder) – as displayed in the List of Values on this slide. The Unit Roster report has these codes as a parameter.

An active employee is represented by those selected on the right:
A = Active
L = Leave Unpaid
P = Leave Paid
W = On Short Work Break
I wanted to point out an important field in the Position folder:

**PS Class Ind**, which identifies from a high level the type of employee.
Employees can have the same job codes (such as Recall Teaching) in separate departments. Everyone has a unique position code.

After looking at this report, you can clearly see that multiple positions in different departments can have the same job code but each has a unique position number.

New universe is built like UCSC’s other universes, where sub folders and objects have 1-4 letters before the name, serving as abbreviations. The universe reflects the current state of UCPath data “as of yesterday” for the current job for active employees.

After clicking Design and then Available Objects, you can see that definitions are there for all objects when hovering over them.

In PPS – transactions were posted immediately & available (in Data Warehouse the next day). For all UCPath transactions, they will need to go through an approval process. Some of these approvals occur locally while others include the UCPath Center (in Riverside), which might take up to 3 or more business days. Transactions can be approved or denied. If a transaction is denied, it will be returned with comments. If denied, the initiator must begin the transaction again.

Distribution Departments in PPS and HR Departments in Path are similar. In most cases they are based on FIS Org Level 4. However, there are a few that are different due to necessary approval routings in Path.
Click Position and then Position Funding Entry to see the Position Funding screenshot on slide 7 to see how the objects are built in the universe.

Position Funding Entry gives information on the unit to charge the cost (the org that is paying for the position). Every position should have funding entered.

Notice that it has it’s own FOAPAL structure.
All funds, activity codes in addition to all financial chart of accounts are the same as in PPS.

Slide 8 shows a comparison from UC Path to PPS of Department number and name in addition to Jobcode and title codes.

Department ID’s are the same except instead of the 2 leading 0’s, there is an ‘SC’

Job Codes are the same as Title Codes (from PPS), but have 2 leading 0’s
The Employee data identifies the specifics of a PERSON who performs the tasks outlined by a POSITION. A key concept to understand about the data relationships in this universe is that it takes a POSITION and an EMPLOYEE to create a JOB. There is one exception in that contingent workers do not always have a corresponding POSITION.

The UCPath system required assigning new Employee Id’s - the object is (“E Employee Id”). Note that the Employee Id’s that are in the report now will change. On 1/2/20, the permanent Employee ID’s will be available in the universe and UC Path.

To adjust to these new ID’s whenever possible the employee’s PPS id can be found in the object labeled “E Employee PPS Id”. Note that not all employees will have a corresponding PPS id and that condition will grow as time passes. This refers to those hired after 12/1/19.

As expected, there will be objects that contain Employee sensitive information not all users are going to see when they go to write a report. You will notice these objects and folders will say “(Restricted Access)” on the folder name. If you do not see these folders when you are building a report it means you don’t have the right to view that data.
You may have noticed the plus sign to the left of Employee Name. This signifies that additional or ‘detailed objects’ are visible when clicking. These were prevalent in the Advancement and Sponsored Projects universes.
Keep an eye out for these because they are commonplace throughout the universe.

Just a reminder, a blue square next to an object is a dimension or text object.

An orange square represents a calculated field or is treated like a number.
You may remember from any previous training that once a person is hired (fulfills a position), that JOB is now filled & data will be available for that job in the Job folder. Job information is specific to the person that is in the job – not the position. This is where salary information for the employee is for the job, but not funding (which is in the Position folder).
People may have more than 1 job – all of that is available here! Their primary job is noted by the Primary Job Indicator object. A Primary job defines campus benefits responsible for eligibility ‘FLSA’. Only one per employee, or none if their primary job is at another UC location.

Based again on the definition in the data model, JOB data contains information that describes the employment relationship of a PERSON (or EMPLOYEE) to the org, and in most cases, the assignment of a PERSON to a POSITION.

As you can see from slide 13, there are quite a few objects and folders within the JOB folder. As with all the folders in UCPath, the objects that are expected to be the most commonly used are made available while the rest are gathered in folders by common types such as the Job Dates folder where you can expect to find all of the date fields associated with a Job.

In the Job data there are two folders which are labeled "(WIP)" for Work In Progress which just means the objects may change, base on feedback on the universe.
Job Data has the specific details of an employee’s job including basic compensation details stored in UC Path. Established when the employee is hired, rehired or transferred into a job in UC Path. While each employee’s job data is unique, much of it is inherited from the position into which the employee was hired. It also includes personal data and information about an employee’s benefits and deductions.
As a rule of thumb, identify the type of data you are looking for. Use information from the top down to ensure proper joins. Position, then Employee, then Job. Note also that the department is where an employee works – not necessarily how an employee is funded.

Reference reports are available to you for Position, Job, and Salary categories and more, where you can get your feet wet to see how the data is populated, the new objects & structure.

For certain objects (like Job Start Date – slide 14), there are several different objects that might be relevant. They will mostly populate with the same data. The best objects to use for Job Start and End date are at the top of the Job Dates subfolder:

JDT Assign Begin
JDT Assign Ends
Another important object (slide 15)

Staff, Academic or Student employee data is now available in the universe, identified with this object:

Using this object, certain types of positions are easily identified.
Going back to the UCPath All Employees –Unit Roster report, let’s take a look at the column ‘RCD’, highlighted on slide 16.

The object is called ‘J Empl Rcd’. It refers to when people have multiple or previous jobs. In most cases, this will always be populated with a 0.

It has NO NUMERIC SIGNIFICANCE beyond making a unique key ... could be a 0 or 1 or 2 or ANY value ... EMPLOYEE ID + JOBCODE + RCD = a "JOB" ... it doesn't matter WHAT the RCD number is.

Additionally, the object Sub (far right in screenshot) is the equivalence to the PPS object ‘sub code’, which specifies if the funds are permanent (Sub 1) or soft (Sub 2).

If your unit keeps their staffing list in balance, you should be able to determine the permanently budgeted employees based on Sub 0 (00) and Sub 1 (01). Those that are not permanently budgeted will be Sub 2 (02).
Here is a drawing that someone shared with me to help understand the overview of UC Path.
Slide 18 shows a screen shot of the objects contained in the single folder called Salary and Benefits Expenses, which has Labor Ledger data.

These objects represent the data that is posted as a result of Payroll processing.

The data contains information about Payments including all pay types and supplements.

It also contains distribution data about the benefits associated with those payroll costs and the org that is responsible for incurring those costs.

This data will also contain information about adjustments to prior period transactions that are normal for Payroll processing.

Here you can find data that represents the Payroll and Benefits expenses that are associated with an Org’s operations.

Reports using these objects can identify the operating costs for the org for any given payroll period(s) and fiscal period(s).
For data to get into the Salary and Benefits Expense MEANS THAT:

They got paid ... to get paid they had to lay the foundation of

1. A POSITION entry has to exist
2. An Employee entry has to exist
3. Once an Employee and Position are identified, a resultant Job entry is established to fill in the specific details of that job for that position and that employee

Only after you get paid and the payroll data is posted to the Payroll Journal will you have evidence of that in the Salary and Benefits Expense data.
DOPE report – ‘UCPath – DOPE’

A difference from the current DOPE report (in PPS) is that the salary information for each org and fund is now in a separate section or table above the Benefit information, which is in it’s own section or table directly below, as shown on slide 20.
DOPE report ‘UCPath – DOPE’

Let’s first look at the Salary data. If an employee is being paid for 2 separate Earning Codes (Ern Cd), they will be on separate lines.
Now, let’s look at the Benefits section/table for that same org and fund – right below the Salary data. Notice that all the columns are the same, but Ern Cd and SBE Hours1 are not populated.

Like the Salary data having 1 row for each Earnings code (Ern Cd) for each employee, Benefit Data has 1 row for each of the benefit types (SBE Description column) – listed on separate lines for each employee.
Let’s take a look again at the objects in Edit Data Provider (DOPE).

Slide 23 is a screenshot of the Salary and Benefit Expenses, having objects such as Employee ID, Fiscal Year, Dates and it’s own FOAPAL.

As all the necessary objects are included here, there is no need to bring in objects from the other folders.

Be careful not to mix these objects with those of other folders.
As stated before, the financial Org numbers are the same, in addition to fund codes, activity codes, and financial chart of accounts.

Depending on what you are reporting on will determine which FOAPAL folder to use. If you are wanting a listing of active employees, you would use the FOAPAL folder in Position Funding Entry. If you are wanting payroll data, you will use the FOAPAL folder in Salary and Benefits Expense.

There are 2 separate FOAPAL folders that are contained in marked folders on slide 24. This was done to accurately present data across Org’s, Funding sources, Activities and Accounts.

Here, a full FOAPAL structure is available for the data. The reason the different FOAPAL structures is that the universe sits over a complex series of tables that all have different context within the data.

The Salary and Benefits Expense tables are recording the FOAPAL that is in effect at the time the transaction occurs. Updates to the Position Funding will not impact prior periods.
For staff employees, Cost Center in PPS is generally the same as appt dept code, which is the same as Level 4 org, which in UCPath is ‘Deptid rollup’.

For Academic positions, Cost Center was a unique set of values, which did not get translated to Path at all.
Let’s talk about another important object called Payroll Run ID.

Payroll Run ID identifies the batch ID and when it is processed for payroll.

Let’s type in Payroll Run ID in filter bar to get the screenshot on slide 26.
If added as a prompt, this is what you will see in the prompt window (slide 27). Remember to widen the screen to see dates!

Keep in mind that data now exists for 2 monthly payrolls (May and June 2019 – fiscal periods 201911 and 201912) in addition to 3 Bi-Weekly payrolls (6/1/19, 6/15/19 and 6/29/19 – fiscal period 201212).

When we go live, the FIRST pay period (Payroll Run ID) will be in December 2019.

The first data load after we go live is 12/9/19, where data will be available 12/10/19. This will be for Monthly employees. The initial Bi-Weekly employee data will be loaded 12/22/19, where data will be available 12/23/19. Note that only the Position, Employee and Job folders will be populated.

The first pay period in UC Path Employment Daily is 1/2/20, where data will be available approximately 1/6/20. A full set of data (Position, Employee, Job and Salary and Benefits Expenses) will be available at this time.

Payroll Run ID can replace dates as parameters, giving a complete collection of transactions including prior period adjustments.
Let’s discuss the new and improved prompt window (slide 28).

Here, you can see the various mechanics of the List of Values (LOV).

After widening the prompt box, descriptions of codes (such as Empl Status) are visible.

This will have to be done every time the report is run.
Let’s select the Dept prompt and click refresh values on the right side and widen our view to see the descriptions.

These values are sortable by any of the columns presented in the display.

Just by clicking on the heading title (“DP Dept ID” or “DP Dept Description”) the list is sorted in ascending sequence.

Clicking the heading again will resort the list in descending sequence.
Let’s type in ‘eng’ to the search filter (slide 30) to filter all departments that have ‘eng’ in them – Engineering.

The search pattern bar is a great way to filter what you are looking for.

This is very handy for longer lists.
The last thing I wanted to share today is a list of commonly used objects in PPS now exist in UC Path, but have different names (slide 31)
There is a new link on the Data Management site (datamgmt.ucsc.edu) containing reference documents.