UCPATH SECURITY PROVISIONING GUIDE
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I. INTRODUCTION

General Information
In the current UCLA Payroll/Personnel System (PPS), payroll transactions input by preparers automatically update PPS. A Post Authorization Notifications (PANs) is generated and a reviewer is required to verify the accuracy of the transaction within two business days.

In contrast, payroll transactions input into UCPath by initiators will require authorization from an approver before UCPath is updated. PANs will not be generated.

For each employee, UCPath generates an eight digit ID, referred to as the EMPL ID. This is different from the UID generated by the Campus.

UC Path functions in DACSS Overview
• There are approximately 430 UCPath functions in DACSS, of which approximately 70 will be distributed to you for administration as a DSA.

• Functions have been grouped into 12 templates based on user roles.

• There are three categories of templates:
  ➢ Human Capital Management (HCM) – employment, leaves, compensation, separation transactions
  ➢ Pay Administrator (PA) – payroll transactions
  ➢ General Ledger (GL) – funding, direct retro and budget transactions

• Each template has versions for initiators, approvers, and inquiry.
  ➢ Initiator templates include HCM-I, PA-I, GL-I.
  ➢ Inquiry templates include HCM-Q, PA-Q, GL-Q.

• In summary, to provision users in UCPath, two major steps will be required by the DSA. (Section II will contain more detailed instructions.)
  Step #1: Apply one or more templates to the user based on instructions from the CAO or unit head. For go live, this information will be shared in the Security Access Worksheet. Templates applied will determine the transaction types that the user can initiate, approve or inquiry.
  Step #2: Assign a PHOVALUE to the user. The PHOVALUE will determine the unit (org, division, subdivision or department) to which a user has access.
  NOTE: Any template applied to a user is applicable for all units to which the user has been granted access.
II. STEPS NECESSARY FOR GO-LIVE

STEP #1: Verify that your DSA profile contains UCPath functions. On the DACSS homepage, click on My Profile.

Scroll through the list of functions and verify that you have functions beginning with PHA, PHS, and PHOVALUE. Also, verify that you are a ROLE_DSA.

NOTE: If your profile does not contain UCPath functions, you will not be able to provision users with UCPath access. Please email Access Services at as@it.ucla.edu.

STEP #2: Refer to the Security Access Worksheet for your unit to determine which users need to be provisioned and which templates need to be assigned to each user. See below
for a Security Access Worksheet Example. All of the worksheet columns could not be fit on one line - all columns relate to user John Smith.

- For UCPATH go-live, monthly and bi-weekly employees need to be provisioned during different times.
  - Friday – Sunday, September 7-9: DSAs should provision monthly employees.
  - Thursday – Friday, September 20-21: DSAs should provision biweekly employees.
  - The **Monthly or Biweekly** column (circled in white) specifies if employees are Monthly (M) or Biweekly (BW).

- The **Org/Div/Dept FS ID** column (circled in green) is the unit to which the user will be granted access (PHOVALUE). NOTE: The Security Access Worksheet does not specify whether the unit is an org, division or department. DSAs are responsible for making this determination.

- Users cannot be provisioned until they have completed the required training. Green indicates that training has been completed. Red indicates that training has not been completed.
  - In the sample above (section circled in orange), user John Smith has completed training for PA-Initiator (PA-I), PA-Approver (PA-A), and GL-Query (GL-Q). John has not completed training for HCM-Initiator (HCM-I) and HCM-Approver (HCM-A).
III. EXAMPLE OF PROVISIONING A USER WITH UCPATH ACCESS IN DACSS:

- Nicole Ngo will be granted HCM Inquiry, PA Initiator, GL Approver-2 for department 3030 and org 3000.

NOTE: There is no way to grant Nicole HCM Inquiry for department 3030 only and PA Initiator and GL Approver for org 3000 only. As mentioned previously, the unit designated as the PHOVALUE will apply to all templates granted.

1. From the DACSS Home Page, go to Manage Access and locate the user to be provisioned, Nicole Ngo. Enter the user’s UID and click on Find User.

   NOTE: Users can be searched by name, UID, UCLA logon, Oasis ID or email.

2. Once in the user’s profile, Click on Apply Template.
3. Scroll through the templates and locate those starting with “UCPath.” 
   To grant HCM Inquiry Access to Nicole, click on the template titled **UCPath HCM-Q ‘Inquiry’**
   
   **NOTE:** All Inquiry Templates will be labeled - Q‘Inquiry’.

You will receive a message confirming the template you selected. Click on **OK**.
You will then get a message showing that the template has been applied.

4. To grant PA Initiator, repeat the same process as in #3 above by clicking on **Apply Template**. Scroll through the templates and locate those starting with “UCPath.” Click on the template titled **UC Path PA – I ‘Initiator’**. 

   **NOTE**: All Initiator Templates will be labeled – I ‘Initiator’.
5. To grant GL Approver 2, repeat the same process as in #3 above by clicking on **Apply Template**. Scroll through the templates and locate those starting with “UCPath.” Click on the template titled **UCPATH GL-A2 ‘Approver 2’**.

**NOTE:** For approvers, there are three levels – make sure to select the correct approver level. All Approver Templates will be labeled – A1 ‘Approver 1’ or A2 ‘Approver 2’ or A3 ‘Approver 3’.

**NOTE:** If the user you are provisioning already has some or all of the functions, you will get a message letting you know that some or all of the functions have already been assigned to the user.
NOTE: If the user you are provisioning already has all of the functions, you will get a message letting you know that the template failed to apply.

6. To grant access to department 3030 and org 3000, enter PHOVALUE within the function tab and click on Add.
Then enter department 3030 and org 3000. (Click on the green check mark after each value is entered.) Click on Commit Changes.

You will receive a message stating that the PHOVALUE updated successfully.

NOTE: A user must have at least one PHOVALUE in order to access UCPATH. If a user is missing a PHOVALUE, there will be no data available in UCPATH for the user to access.
IV. IMPORTANT INFORMATION ABOUT TEMPLATES

- In order for the UCPath templates to be used by DSAs across the campus, they are “Public” and cannot be locked. To guard against inadvertent alteration, DSAs should make sure that from the DACCS home page, only the Manage Access button is used. DSAs should NEVER use Manage Templates.
V. KEEPING A RECORD OF UCPATH ACCESS REQUESTS

- Once a template has been applied to a user, the functions from the template will become part of the user’s profile. After the initial update, there will be no record in DACSS of which template was applied to the user - only the functions will remain in the user’s profile.

- It is recommended that the initial Security Access Worksheet is maintained and future additions and deletions are recorded. This record should be accessible to departmental DSAs and the CAO. This information will be critical when the DSA is asked to delete or modify a user’s UCPath access.
VI. EXAMPLE OF DELETING A USER’S UCPATH ACCESS IN DACSS

- As previously mentioned, after the initial update, there is no record in DACSS of which template was applied to the user. Only the functions from the template will remain in the user’s profile.

- Therefore, it is not possible to delete a user’s UCPath Access in DACSS using templates. Each function needs to be deleted individually.

To delete HCM-Q from Nicole Ngo, follow the steps below:

1. Refer to the UCPath Function Workbook and determine which functions belong to HCM-Q. (The Workbook indicates that HCM-Q template consists of PHS112, PHS113, PHS130.)

2. Review your DSA file of system access requests (described in Section V above) and determine which other templates were assigned to the user.

3. Refer to the UCPath Function workbook and determine if any of the other templates assigned to the user contain PHS112, PHS113, PHS130.

4. Only delete functions that are not part of any templates that the user is supposed to have. Delete each of the functions individually.

5. From the DACSS Home Page, go to Manage Access and locate, Nicole Ngo. Enter the user’s name and click on Find User.
6. Click on **PHS112**, and then on **Remove Function**. Repeat for each of the functions that need to be deleted.

NOTE: All DACSS functions, including approver functions, will be part of the **Functions Tab** in the user’s profile. In contrast, for other UCLA systems, reviewers are maintained under the **Proc IDs Tab**.