



# UCPath

## GLOSSARY

UNIVERSITY  
OF  
CALIFORNIA

UCPath

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| TERM               | DEFINITION  | MAY ALSO BE CALLED                     |
|--------------------|---|--|
| Absence Management | Absence Management is a module in UCPath that UC leave administrators will use to plan and manage absence events (including extended leaves) and calculate vacation and sick time. Absence Management is UC's single system of record for all paid time off.  | Leave Administration                   |
| Business Unit      | See Location  |  |
| Case               | <p>An online ticket/request opened in UCPath when UC employees and managers request help and track service requests from the staff at the UCPath Center.</p> <p>Advantages:</p> <ul style="list-style-type: none"> <li>• You will be able to open a case whenever you have an issue/request (24 hours a day, 7 days a week.)</li> <li>• You will be able to submit a request on behalf of someone else</li> <li>• You will be able to attach supporting documents</li> <li>• You will be able to control the initial description of your issue/request</li> <li>• Information will be collected in one place</li> <li>• You will be able to watch/track your problem or request until it is resolved</li> </ul> | Ticket/Request                         |
| Change Management  | <p>The application of a structured process and set of tools for leading people through organizational changes.</p> <p>The UCPath Organizational Change Management (OCM) team includes communications, change management, and training.</p>  | Organizational Change Management (OCM) |
| Conversion         | The process of converting data from the legacy/source system such as PPS to UCPath.   |  |
| Cutover            | The project phase during which a location transitions from the legacy/source system (i.e. PPS) to UCPath and future state business processes. Cutover takes place over several weeks and includes monthly and biweekly employee data conversion, manual entries, final PPS payroll processing, initial transaction entry, initial UCPath payroll processing and user security/access provisioning.  |  |

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| Data Distribution Operational Data Store | <p>The UCPath Data Distribution Operational Data Store (DDODS) extracts and delivers data from the UCPath PeopleSoft Human Capital Management System (HCM) that has been requested and approved for distribution to UC Locations for consumption in local data warehouses and other interfaces. The flow of data is unidirectional from UCPath HCM to UC Location.</p> <p>The DDODS is a product, delivering not only the data, but also the code for building local operational data stores identical to the DDODS data model that will store the data delivered to UC Locations and also a Loader application that loads the delivered DDODS data files into the local operational data stores. The locations can then use the data to populate campus systems.</p> <p>As a product, the DDODS requires ongoing management, most notably the nightly extraction of HCM data and the bursting of this data to the appropriate UC Locations. Other product management includes: change management, processing requests for new tables and data to be extracted from HCM and burst to UC Locations, versioning, documentation, roll-out/upgrade process, scheduling, packaging, and distribution.</p> | DDODS              |
| Demilitarized Zone                       | Use of a military acronym (Demilitarized Zone) to describe a virtual area of a network that facilitates specialized security-centric interactions with 'external' parties (e.g. business partners, internet users) and the 'internal' parties (e.g. UC applications). Sometimes referred to as the perimeter part of a network.  | DMZ                |
| Dress Rehearsal                          | The practicing of cutover and operational/production activities prior to the actual cutover/go-live. The dress rehearsal schedule aims to mimic the go-live schedule and provides the teams with an opportunity to fine tune durations and activities prior to going live.   |                    |
| Future State Process Design              | The approximately 100 processes in the areas of payroll, benefits, finance/GL integration, absence management, compensation and human resources/workforce administration that have been standardized among all UC locations as a part of UCPath. These processes determine work performed by the UCPath Center and work performed by UC locations.   | FSPD               |
| Hypercare                                | Onsite post go-live support. During this period, UCPath PMO staff is onsite at deployed locations and the UCPath Center to provide enhanced care and issue resolution ensuring a smooth transition.  |                    |

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| Integration Testing  | Integration testing assesses systems and end-to-end business processes required for go-live, confirming all business functions, interfaces, data exchanges and supporting systems execute as planned in a combined environment, including any previously implemented locations and in-scope upstream/downstream systems. Typically there are multiple iterations of integration testing.   | IT                                |
| IVR System           | IVR stands for “Interactive Voice Response.” This technology is in place at the UCPath Center and enables callers to route calls to the right area or service representative for assistance.   | Interactive Voice Response System |
| Job Code             | <p>Job codes are used to define job titles and related classifications, including job families, FLSA, compensation rate ranges and steps and EEO compliance categories.</p> <p>Job codes are different from positions. All employees will be assigned a job code; however, positions can be tracked without an incumbent.</p> <p>For example, a job code may represent the administrative assistant title, and that job may have different administrative assistant positions – one in Human Resources and another in Finance.</p> <p>Positions track details for a specific job in a specific department, location, union and funding source regardless of whether an incumbent exists.</p> | Title Code (in PPS)               |
| Labor Ledger         | <p>Series of UCPath tables that store payroll expense distribution data (Salary, Fringe, Liabilities) at two levels:</p> <ol style="list-style-type: none"> <li>1) FAU Summary (journal data)</li> <li>2) Employee/Job/Transaction/FAU Detail.</li> </ol> <p>The data is made available to locations via DDODS. Locations use Labor Ledger data to build financial journals for posting to their local Financial System, and for reporting and reconciliation purposes.</p>  |                                   |
| Leave Administration | See Absence Management   |                                   |

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| Life Event               | A change in the status of the employee, such as birth of a child, death of a spouse, marriage or divorce.   |                    |
| Location                 | <p>A UCPath-specific umbrella term for campuses, health systems and other UC programs/organizations that will be transitioning to UCPath. UCPath locations include:</p> <ol style="list-style-type: none"> <li>1. Berkeley</li> <li>2. Davis</li> <li>3. Davis Health System</li> <li>4. Irvine</li> <li>5. Irvine Health System</li> <li>6. Merced</li> <li>7. Riverside</li> <li>8. San Diego</li> <li>9. San Diego Health System</li> <li>10. Santa Barbara</li> <li>11. Santa Cruz</li> <li>12. UCLA</li> <li>13. UCLA Health System</li> <li>14. UCSF</li> <li>15. UCSF Health System</li> <li>16. UC Office of the President (UCOP)</li> <li>17. Agricultural &amp; Natural Resources (ANR)</li> <li>18. ASUCLA (Associated Students of UCLA)</li> <li>19. Hastings School of Law</li> <li>20. Lawrence Berkeley National Laboratory</li> </ol> <p>Each of the 20 locations is identified in UCPath as a 'Business Unit,' which will be used to segregate information for reporting and system security access.</p> | Business Unit      |
| Managed File Transfer    | A machine-to-machine (no human interaction) data exchange mechanism used by UCPath. It uses a combination of standard protocols (e.g. SFTP, FTPS) to send information (data files) between campuses, UCPath and business partners (e.g. Kaiser Permanente).   | MFT                |
| Payroll Parallel Testing | The process of validating UCPath payroll calculations with PPS and resolving any variances between systems. PPT verifies that the new system produces monthly and biweekly payroll results comparable to the legacy system and that all variances are corrected or explained, and are either accepted, corrected, or dispositioned.   | PPT                |

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| Pilot               | <p>Pilot locations are the first to go live with UCPath following UCOP.</p> <p><i>UCPath will roll out in several stages. The UC Office of the President (UCOP) deployed UCPath first on November 30, 2015. This first deployment included a relatively small population: a few more than 1,700 employees, nearly all of them in non-academic positions.</i></p> <p>The next group of UC locations to deploy UCPath is the pilot. The pilot includes UC Merced, UC Riverside and ASUCLA. These locations went live on January 2, 2018.</p> <p>The remaining UC locations will go live in two groups (see D1 and D2)</p> |                          |
| Portal              | <p>A data presentation mechanism for users, accessible by internet browser software (e.g. Chrome, Firefox). It conveys salient personalized information, navigation and access to business processes (e.g. report a problem, update benefits.)</p>  |                          |
| Position Management | <p>Position Management is a module in UCPath that defines and standardizes information for approved positions with or without an incumbent.</p> <p>Attributes include home department, job code, standard hours, FTE, union affiliation, maximum headcount, reporting relationship, etc.</p> <p>In most cases, there will be one position for each employee.</p> <p>However, multiple incumbents with the same position attributes may be assigned the same position. Position Management is useful for recruitment, succession planning, monitoring turnover, etc.</p>   |                          |
| PPS                 | <p>The 35-year-old system that will be replaced by UCPath. Currently within UC, there are 11 versions of PPS, each with data definitions and policies/rules applied differently.</p>  | Payroll/Personnel System |
| Road Show           | <p>Events organized by locations to ensure change readiness. Location teams hold these to raise awareness and communicate information about the upcoming business transformation and impacts to the organization.</p>   |                          |

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| Service Partnership Agreement | <p>Service Partnership Agreements (SPA) outline the roles and responsibilities for both the UCPath Center and the locations/partners as it relates to UCPath.</p> <p>The SPA establishes:</p> <ul style="list-style-type: none"> <li>• How oversight and governance will be provided</li> <li>• Methods used to measure quality and performance</li> <li>• Commitments the UCPath Center will provide to locations/partners</li> <li>• Working assumptions and service constraints</li> <li>• Roles and responsibilities of all parties to set fundamental standards</li> <li>• Feedback procedure that details the value placed on continual improvement, and the process for locations/partners to provide feedback on services received</li> </ul> | SPA                     |
| Single sign-on                | UC employees will use their current UC logins to access UCPath.   | SSO                     |
| System Testing                | <p>System testing verifies the standalone components of an application work together as a product. This includes the flow of data within modules. Locations simultaneously test upstream and downstream products impacted by UCPath. All components are tested in preparation for integration testing.</p>  | ST                      |
| Subject Matter Expert         | An individual who is an expert or authority in a particular area or topic.  | SME (pronounced "smee") |
| Super User                    | UCPath user who uses UCPath to enter transactions with permissions above and beyond employee/manager self-service access.   |                         |
| Supplement                    | A defined contribution plan available to selected employees participating in the Defined Benefit plan who are subject to a new, lower covered compensation limit (the 2016 CCLs) associated with the defined benefit plan   |                         |
| Test Case                     | A set of input values, pre-conditions, expected results, and post-conditions that are created to verify a particular test requirement or objective. It may define <b>'how'</b> to execute the test with step-by-step instructions.  |                         |
| Ticket                        | See Case  |                         |

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| UCPath | <p>UCPATH = UC Payroll, Academic Personnel, Timekeeping* &amp; Human resources.</p> <p>UCPath is the critical business transformation program of the University of California. UCPath includes three components:</p> <ol style="list-style-type: none"> <li>1. Replacing UC’s 35-year old payroll/personnel system with a single new payroll and HR technology system</li> <li>2. Standardizing and streamlining payroll and HR processes systemwide</li> <li>3. Centralizing certain HR, Academic Personnel and payroll transactional processes within a shared service center</li> </ol> <p><i>*Timekeeping is still under consideration for a later phase. The current phase includes Payroll, Benefits, Absence Management, Compensation, Workforce Administration, Talent Acquisition Management and ePerformance</i></p> | Self-service, portal, system, tool |

**Additional information about tools, systems, and technologies related to UCPath:**

UCPath will be available 24x7 and will replace all of PPS and much of AYSO.

UCPath includes:

- **PeopleSoft:** Human resource management and payroll software
- **Salesforce:** Case management/ticketing and employee portal software
- **Other technologies** that support delivery of human resources and payroll services to UC employees and management of employee and job data.

Interfaces with campus systems will enable data communication between UCPath and other systems, including location-based systems.

With UCPath, UC employees will be able to:

- Submit questions via case management
- Track requests
- Look up answers in a knowledge base
- Review/Change certain employee information directly such as:
  - Name
  - Address
  - Emergency Contact
  - Paycheck/W-2 information
  - Benefits information
  - Open enrollment
  - Direct deposit
  - Life event changes

UC managers (who have approval access) will see relevant, work-related information about their employees in one place (the manager dashboard). There, they can:

- Approve certain transactions through automated approval routing tools
- Review the status of transactions and approvals
- View employee personal information and reporting relationship
- Find management and support information



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| UCPath Center                   | <p>The UC systemwide shared services center in Riverside, CA.</p> <p>The Center will consolidate routine transaction processing and employee support for some tasks in the areas of payroll, benefits, absence management, compensation, and workforce administration. Services include:</p> <ul style="list-style-type: none"> <li>• Answering basic questions in these areas</li> <li>• Conducting pre, payroll and post-payroll processing</li> <li>• Managing benefit enrollment and administration</li> <li>• Processing job, data and pay change and maintain employee records</li> <li>• Facilitating the set up and maintenance of leave of absence program structure</li> </ul> <p>The Center is staffed from 8 a.m. to 5 p.m. Monday through Friday and will likely employ up to 420 people by the time UCPath is fully rolled out to all UC locations.</p> | UCPC               |
| UCPath Center Employee Services | <p>The employee services team is the first point of contact for those who contact the UCPath Center.</p> <p>Employee services will provide assistance to UC faculty and staff via UCPath portal (cases), telephone, e-mail, fax and regular mail.</p>   |                    |
| UCPath Center Production        | <p>The UCPath Center's production unit will provide timely and accurate processing of absence management, benefit, payroll, reporting, records fulfillment and work force administration transactions.</p> <p>In addition, production will serve as an escalation point for employee services when additional research, follow-up and processing is required.</p> <p>Production consists of five functional teams:</p> <ul style="list-style-type: none"> <li>• Payroll</li> <li>• Benefits</li> <li>• Workforce administration</li> <li>• Records and fulfillment</li> <li>• Reporting and analytics</li> </ul>  |                    |
| UCPath PMO                      | <p>The central UCPath team working to implement UCPath for and with all location teams The central team is not inclusive of UCPath project teams at the UC locations or the UCPath Center staff.</p> <p>This team is primarily based out of the UC Office of the President in Oakland, CA.</p>  | All-Hands          |

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| User Acceptance Testing (UAT) | <p>UAT is the last phase of the software testing process. During UAT, end users test the software to make sure it can handle required tasks in real-world scenarios, according to specifications.</p> <p>UAT is one of the final critical software project procedures that must occur before new technology is rolled out.</p>  | <p>User Testing<br/>Beta testing<br/>Application testing<br/>End user testing</p> |
| Verification Of Employment    | <p>Confirmation of employment at UC for personal purposes such as loan and lease applications. For third-party verification, this service is provided by <i>The Work Number</i> (TWN) and can be requested via UCPath. Employees can also obtain a document of verification for themselves directly from the UCPath Center.</p>   | <p>VOE</p>  |
| Web Services                  | <p>A machine-to-machine (no human interaction) data exchange mechanism used by UCPath. It uses a combination of standard protocols (e.g. XML, SOAP, 2-Way-SSL) to send information (messages) in “near real time” between campuses, UCPath and business partners (like salesforce).</p>   |   |
| Workforce Administration      | <p>Workforce Administration (WFA) is a module in UCPath to be used by HR administrators at UC locations and at the UCPath Center to manage an employee’s lifecycle.</p> <p>WFA allows users to track and manage job related data, including managing pay and compensation, benefit eligibility programs, position and employee data, payroll and HR status.</p> <p>Other menus under the umbrella of HR information management include:</p> <ul style="list-style-type: none"> <li>• Profile Management</li> <li>• Payroll for Additional Pay, Direct Deposit, Tax Info</li> <li>• Position Management</li> <li>• Faculty Events</li> <li>• Compensation - Employee Review</li> </ul> | <p>WFA</p>  |

Many **acronyms** or abbreviations are used on the UCPath project. The most commonly used acronyms follow below.

## Table of Acronyms

| Abbreviation               | Description   |
|----------------------------|---|
| 1994 CCL                   | 401(a) grandfathered fiscal year Covered Compensation Limit for employees entering UCRP prior to 07/01/1994                       |
| 2016 CCL – coordinated     | Covered compensation limit based on California PEPPRA cap for employees subject to OASDI entering UCRP on or after 07/01/2016     |
| 2016 CCL – non-coordinated | Covered compensation limit based on California PEPPRA cap for employees not subject to OASDI entering UCRP on or after 07/01/2016 |
| ACA                        | Affordable Care Act   |
| ACD                        | Automatic Call Distribution   |
| ALM                        | Application Lifecycle Management (a.k.a. HP ALM, HPQC)  |
| AM                         | Absence Management  |
| AP                         | Academic Personnel  |
| APD                        | Academic Personnel Director   |
| AWE                        | Approval Workflow Engine  |
| AWS                        | Amazon Web Services   |
| AYSO                       | At Your Service Online  |
| BAM                        | Business Activity Monitoring  |
| BN                         | Benefits  |
| BPEL                       | Business Process Execution Language   |
| CA                         | Commitment Accounting   |
| CCL                        | Covered Compensation Limit  |
| CDD                        | Conversion Design Document  |
| CDM                        | Common Data Mart  |
| CEMLI                      | Conversions, Extensions, Modifications, Localizations and Interfaces  |
| CMD                        | Conversion Mapping Document   |
| COC                        | Council Of Chancellors  |
| COE                        | Center Of Excellence  |

## UCPath GLOSSARY

|       |   |
|-------|---|
| COVC  | Council Of Vice Chancellors   |
| COVCA | Council Of Vice Chancellors of Administration   |
| CPS   | Corporate Personnel System  |
| CRM   | Customer Relationship Management  |
| CRP   | Conference Room Pilot   |
| CRs   | Change Requests   |
| D1    | Deployment 1 (UCSC, UCI, UCD, ANR, UCSB)  |
| D2    | Deployment 2 (UCB, UCSD, LBL, Hastings, UCSF)   |
| DB    | Defined benefit; traditional pension similar to Tier 2013   |
| DC    | Defined contribution / Choice plan available as an alternative to the Defined Benefit plan and its supplement |
| DDODS | The UCPath Data Dissemination Operational Data  |
| DMZ   | Demilitarized Zone  |
| DW    | Data Warehouse  |
| EBC   | Executive Budget Committee  |
| ETAS  | Endowment & Investment Accounting System  |
| ELT   | Executive Leadership Team   |
| EOY   | End of Year   |
| ERIT  | Employee-initiated Reduction In Time  |
| ESS   | Employee Self Service   |
| EVC   | Executive Vice Chancellor   |
| FDD   | Functional Design Document  |
| FMLA  | Family Medical Leave Act  |
| FSPD  | Future State Process Design   |
| FUT   | Functional Unit Testing   |
| GL    | General Ledger  |
| HCM   | Human Capital Management  |
| HR    | Human Resources   |

## UCPath GLOSSARY

|               |   |
|---------------|---|
| IDM           | Identity Management   |
| IDP           | Identity Provider   |
| IRS CCL       | 401(a) (17) non-grandfathered fiscal year Covered Compensation Limit for employees entering UCRP on or after 07/01/1994 |
| IVR           | Interactive Voice Response (database)   |
| IT            | Information Technology  |
| IT (1, 2, 3)  | Integration Testing 1, 2, 3   |
| LMS           | Learning Management System  |
| MFT           | Managed File Transfer   |
| MSS           | Manager Self Service  |
| OCM           | Organizational Change Management  |
| ODS           | Operational Data Store  |
| OE            | Open Enrollment   |
| OMCS          | Oracle Managed Cloud Services   |
| OSB (routing) | Oracle Service Bus  |
| PATH          | Payroll, Academic Personnel, Timekeeping, Human Resources   |
| PCSSC         | Production Control Shared Service Center  |
| PEPRA         | California Public Employees' Pension Reform Act of 2013   |
| PIN           | Personnel Information   |
| PMO           | Program Management Office   |
| PPS           | Personnel Payroll System (current payroll system for UC)  |
| PPT           | Payroll Parallel Test   |
| PS / PSFT     | PeopleSoft  |
| PY            | Payroll   |
| SIT           | System Integration Test   |
| SLA           | Service Level Agreement   |
| SME           | Subject Matter Expert   |
| SOA           | Service Oriented Architecture   |

## UCPath GLOSSARY

|      |   |
|------|---|
| SPA  | Service Partnership Agreement   |
| SSL  | Secure Sockets Layer  |
| SSO  | Single Sign On  |
| ST   | System Test   |
| TAM  | Talent Access Management  |
| TCS  | Title Code System   |
| TRS  | Time Reporting System   |
| UAAL | Unfunded Actuarial Accrued Liability                                  |
| UAT  | User Acceptance Test  |
| UCRP | University of California Retirement Plan                              |
| UCRS | University of California Retirement System                            |
| UFT  | Unified Functional Testing (previously Quick Test Professional – QTP) |
| VOE  | Verification Of Employment  |
| VPN  | Virtual Private Network   |
| WFA  | Work Force Administration   |