

# LIVED NAME & UCPATH UPGRADE INQUIRY TRAINING

June 16, 2023

UCR Campus Support Center

# AGENDA

Welcome & Introductions (5 min)

UCPath Lived Name Background (5 min)

Lived Name Search Impacts (5 mins)

★ Lived Name Search Demonstration (15 min)

UCPath Upgrade Changes (5 min)

★ UCPath Upgrade Demonstration (15 min)

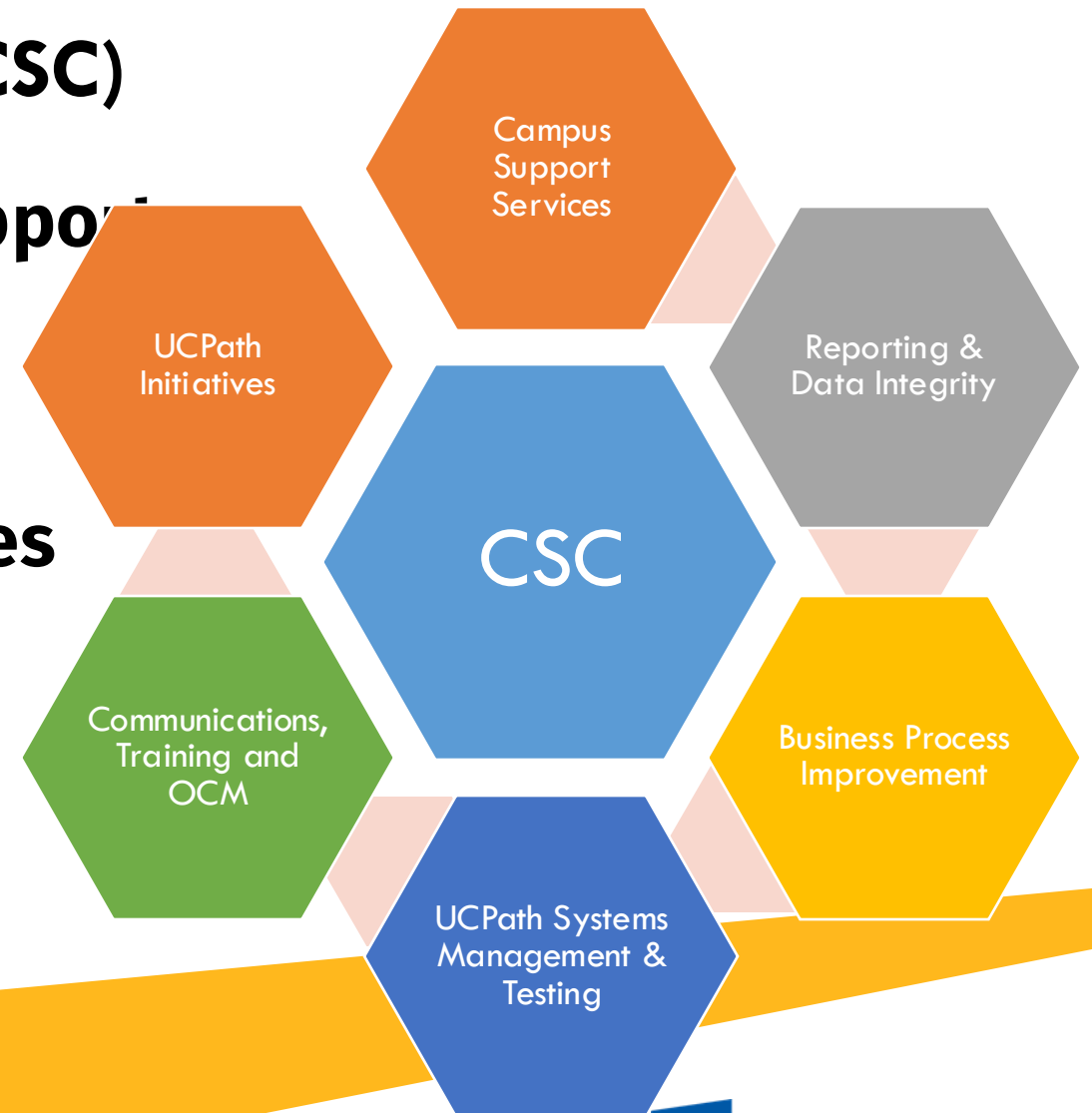
Hypercare (5 min)

Questions & Wrap-Up (5 min)

# WELCOME & INTRODUCTIONS

## UCR Path Campus Support Center (CSC)

- **UCPath System Implementation Support**
  - 7 Shared Service Centers
  - Departments and ORGs
  - Campus Employees
  - Campus Liaison to the UCPath Center
- **CSC Collaborates with Central Offices**
  - Academic Personnel
  - Business Financial Services
  - Human Resources
  - Financial, Planning and Analysis
  - Information Technology Solutions



# LIVED NAME BACKGROUND

On June 20, 2023, UCPATH will be introducing changes to support the UC Gender Recognition and Lived Name (GRLN) policy. The GRLN policy states legal names should be kept confidential if the Legal Name is different than the Lived Name.

## WHAT IS IT?

- Enable Lived Name to display on all UCPATH pages where Legal Name is not required
- Minimize visibility of Lived Name and Legal Name display side-by-side

## WHY?

- Compliance as required by the UC Gender Recognition and Lived Name (GRLN) policy

## WHEN?

- June 20, 2023

# REQUIRED HR TRAINING FOR LEGAL NAME ACCESS

There are pages in UCPATH that you may need access to do your job:

- **Dept HR Inquirer** (Information, Validation)
  - Job Data – Work Location, Job Information, Job Labor, Payroll, Salary Plan etc.
  - Workforce Job Summary – General Actions with effective dates etc.

This access provides Search and Search Results in Name or Legal Name

## UCLC TRAINING

Please search the following required courses in our UCLC:

- UC Policy on Gender Recognition and Lived Name (35-min)
- Gender Recognition & Lived Name: An Introduction to Gender Awareness (30-min)

## CONFIDENTIALITY AGREEMENT

- The [Confidentiality Agreement](#) must be completed by staff with access to any system, document, etc., that contains Lived and Legal Name.
- Must be filed in the employee's personnel file, with a copy to [hrpolicy@ucr.edu](mailto:hrpolicy@ucr.edu).

## WHEN?

- **June 16, 2023**
- \*Prior to the UCPATH Upgrade and Lived Name Go-Live

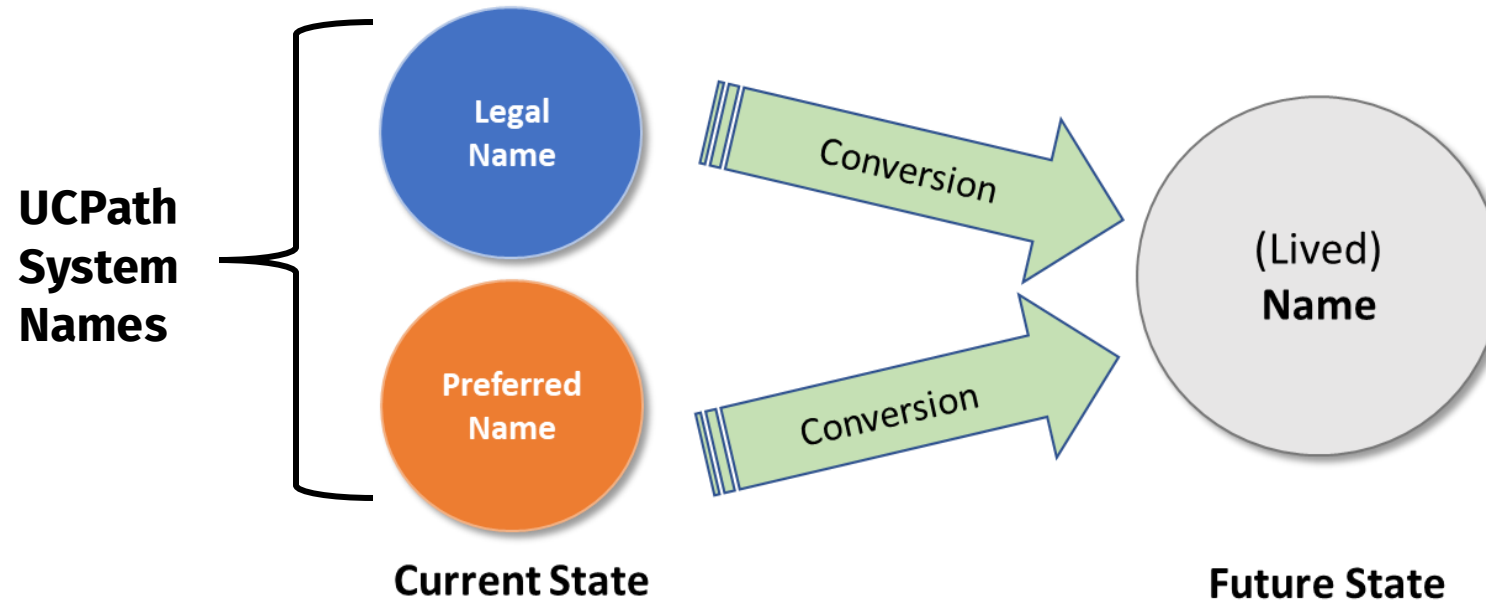


# UCPATH LIVED NAME

*Search Impacts*

# LEGAL NAME/PREFERRED NAME CONVERSION

## Display Name



- The 'Name' field will populate the display name with the employee's self-chosen name or their legal name if a self-chosen name is not provided
- UCPATH will only use the legal name when necessary for regulatory and business purposes
- The Search, Search Results and Name on the page have been mostly converted to 'Name'

# PERSON ORG SUMMARY

(System-wide search access & (Lived) Name search)

Current State

Future State

**Person Organizational Summary**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

▼ **Search Criteria**

Empl ID begins with ▼

Name begins with ▼

Last Name begins with ▼

Second Last Name begins with ▼

Middle Name begins with ▼

**Case Sensitive**



**Person Organizational Summary**

**Find an Existing Value**

▼ **Search Criteria**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches

Empl ID begins with ▼

Last Name begins with ▼

Name begins with ▼

^ Show fewer options

Case Sensitive



# JOB DATA RELATED > JOB DATA

(Specific to accountability structure & Legal and (Lived) Name search)

Current State

**Job Data**

Enter any information you have and click Search. Leave fields blank for a li

**Find an Existing Value**

▼ **Search Criteria**

Empl ID **begins with**

Empl Record **=**

Name **begins with**

Last Name **begins with**

Middle Name **begins with**

HR Status **=**

Business Unit **begins with**  🔍

Department **begins with**  🔍

Job Code **begins with**  🔍

Include History  Case Sensitive

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

Future State

**Job Data**

**Find an Existing Value**

▼ **Search Criteria**

Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches  🔍

Empl ID **begins with**

Empl Record **=**

**Name** **begins with**

**Legal First Name** **begins with**

**Legal Middle Name** **begins with**

**Legal Last Name** **begins with**

HR Status **=**

Business Unit **begins with**  🔍

Position Number **begins with**  🔍

Department **begins with**  🔍

Job Code **begins with**  🔍

Case Sensitive  Include History

**Search** **Clear**



# JOB DATA RELATED > WORKFORCE JOB SUMMARY

(Specific to accountability structure & Legal and (Lived) Name search)

Current State

Future State

**Workforce Job Summary**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

▼ **Search Criteria**

Empl ID **begins with**

Empl Record **=**

Name **begins with**

Last Name **begins with**

Middle Name **begins with**

HR Status **=**

Business Unit **begins with**  🔍

Department **begins with**  🔍

Job Code **begins with**  🔍

Case Sensitive

**Search** **Clear** Basic Search 🔍 Save Search Criteria



**Workforce Job Summary**

**Find an Existing Value**

▼ **Search Criteria**

Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches  🔍

Empl ID **begins with**

Empl Record **=**

**Name** **begins with**

**Legal First Name** **begins with**

**Legal Middle Name** **begins with**

**Legal Last Name** **begins with**

Organizational Relationship **=**

HR Status **=**

Business Unit **begins with**

Position Number **begins with**

Department **begins with**



# DEMONSTRATION

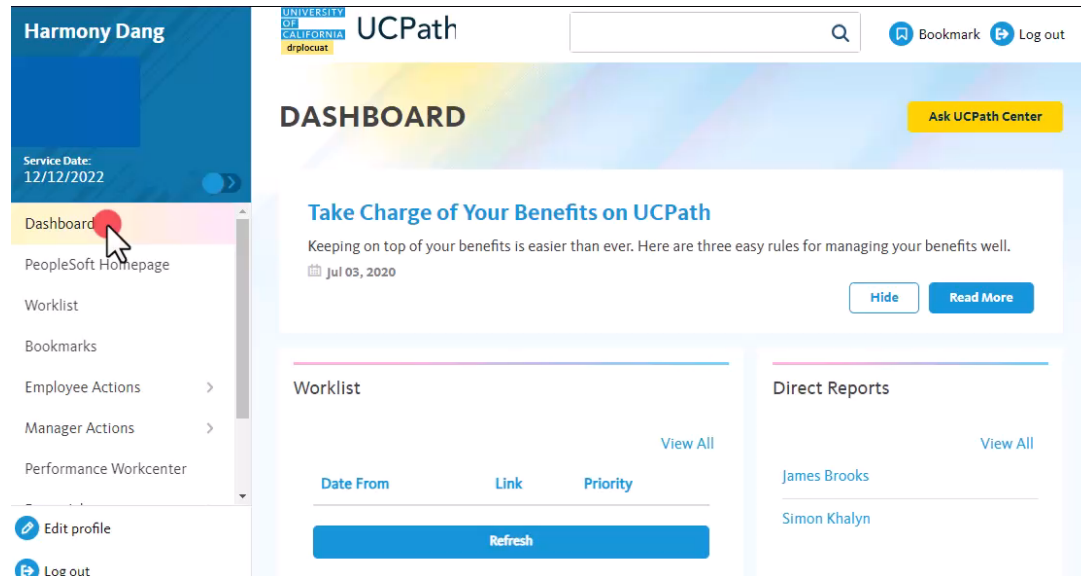
*Lived Name Search*

# EMPLID<sub>s</sub> GO A LONG WAY...

Sometimes searching by name does NOT give you the best search results.

If the request is coming from Manager, use Manager Self Service Dashboard to find EMPLID.

If the request is from Employee, an employee can find their EMPLID by logging in to UCPATH on the top left corner under their “Primary Title”



- Dashboard
- PeopleSoft Homepage
- Worklist
- Bookmarks



# ANNUAL UCPATH UPGRADE

*PUM44*

*Interface Changes*

# UCPATH ANNUAL UPGRADES BACKGROUND

## What is PUM44?

As of June 20, 2023, UCPATH will be on the new PeopleSoft release, PUM44

- This is an Oracle supported release – the vendor fixes things (not UCPATH)
- Can take advantage of new functionality – Name search
- Moves the UCPATH HR, Benefits and Payroll system toward a stabilized environment

### WHAT IS IT?

- New tile icons
- New homepage selector
- New accessibility friendly color theme
- Global Search functionality

### WHY?

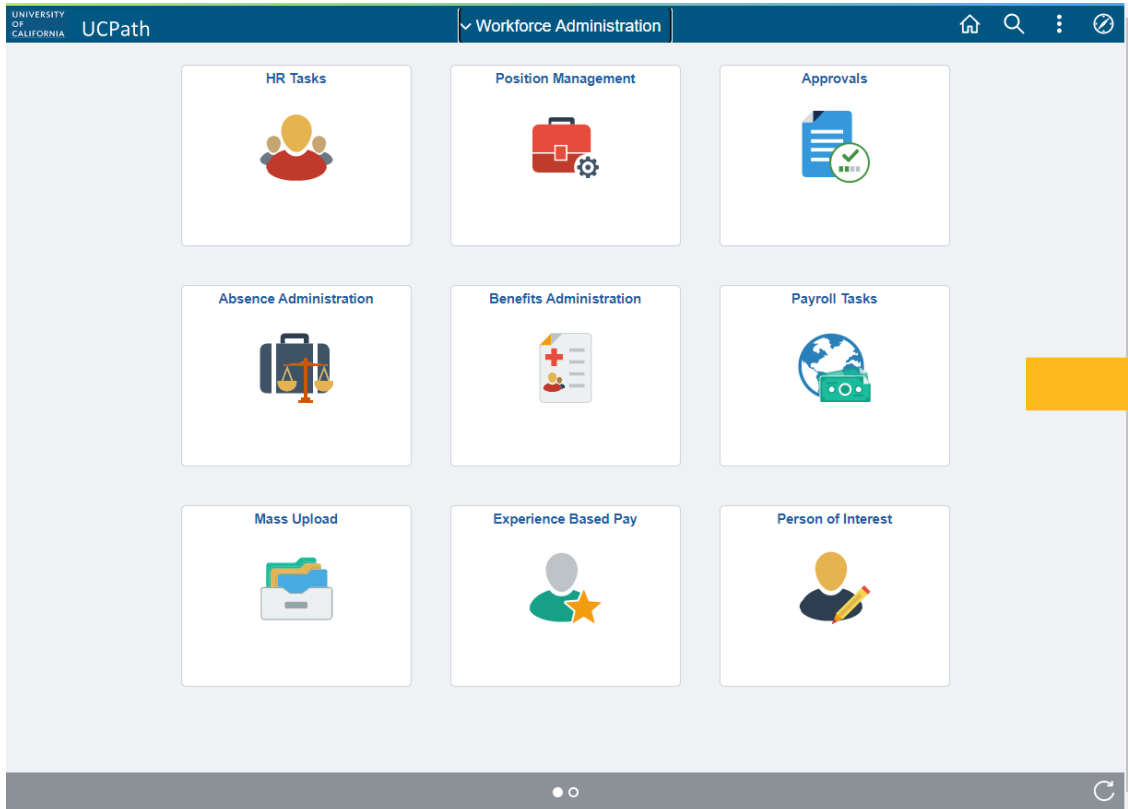
- An annual upgrade to ensure UCPATH is on an Oracle supported release platform

### WHEN?

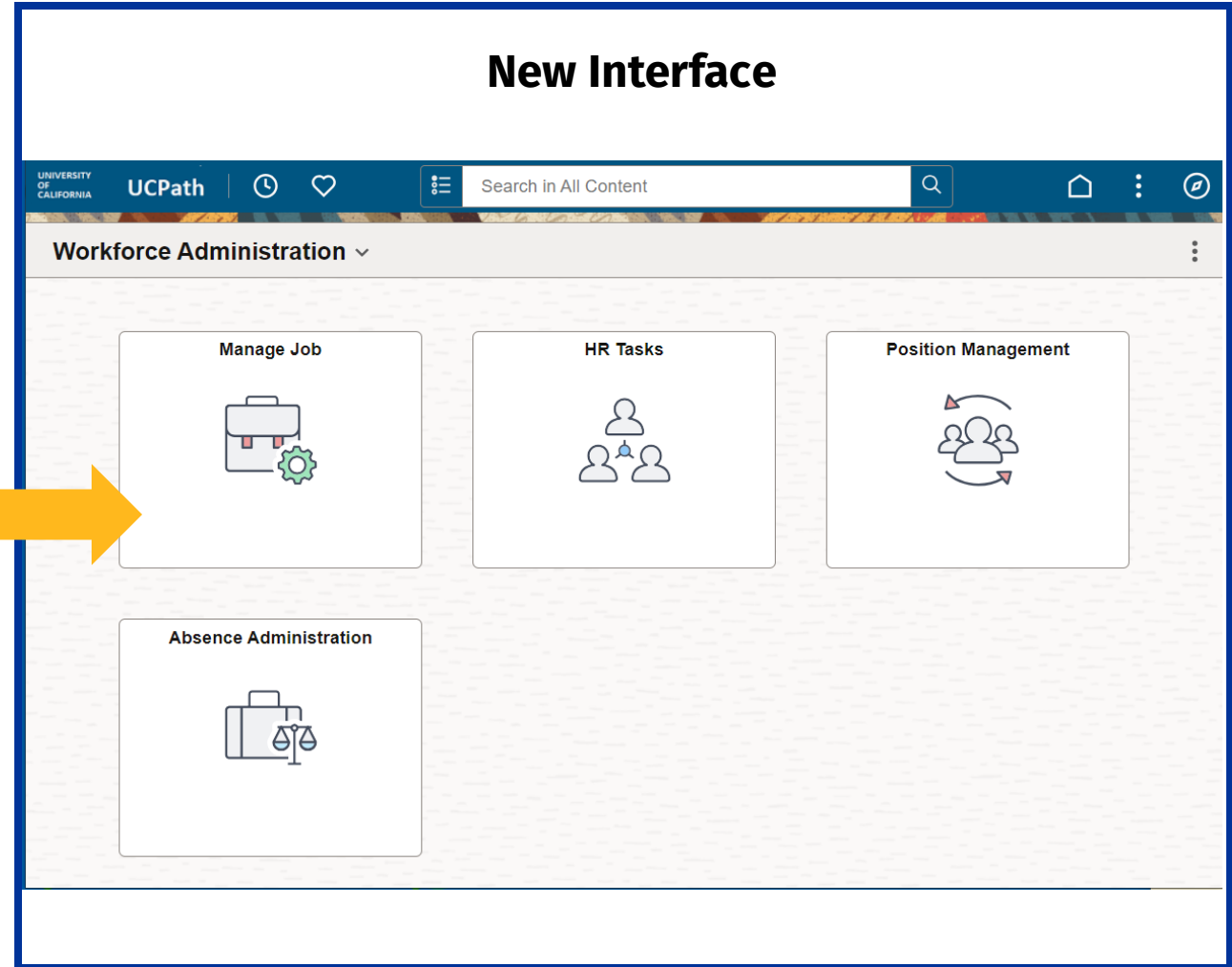
- June 20, 2023

# INTERFACE CHANGES

## Current Interface



## New Interface



# HOMEPAGE UPDATES

PUM44 Upgrade updated for accessibility (icons & color theme)

- Homepages
- Tiles
- Navigation Collections

**Navigation will not change**

New Color Theme


The screenshot displays the UCPath Workforce Administration homepage. The top navigation bar is dark blue with the UCPath logo, a search bar, and navigation icons. Below the navigation bar is a breadcrumb trail for 'Workforce Administration'. The main content area features a grid of nine tiles, each with a title and a new icon:

- Manage Job**: Icon of a briefcase and gear.
- HR Tasks**: Icon of three people.
- Position Management**: Icon of three people with circular arrows.
- Approvals**: Icon of a document with a checkmark.
- Absence Administration**: Icon of a briefcase and scales.
- Payroll Tasks**: Icon of a document with a magnifying glass.
- Benefits Administration**: Icon of a document with a plus sign and a person.
- Mass Upload**: Icon of a folder.
- Person of Interest**: Icon of a person and a pencil.




# HOMEPAGE UPDATES


New Quick Access Bar


 Displays the 10 most recently visited pages

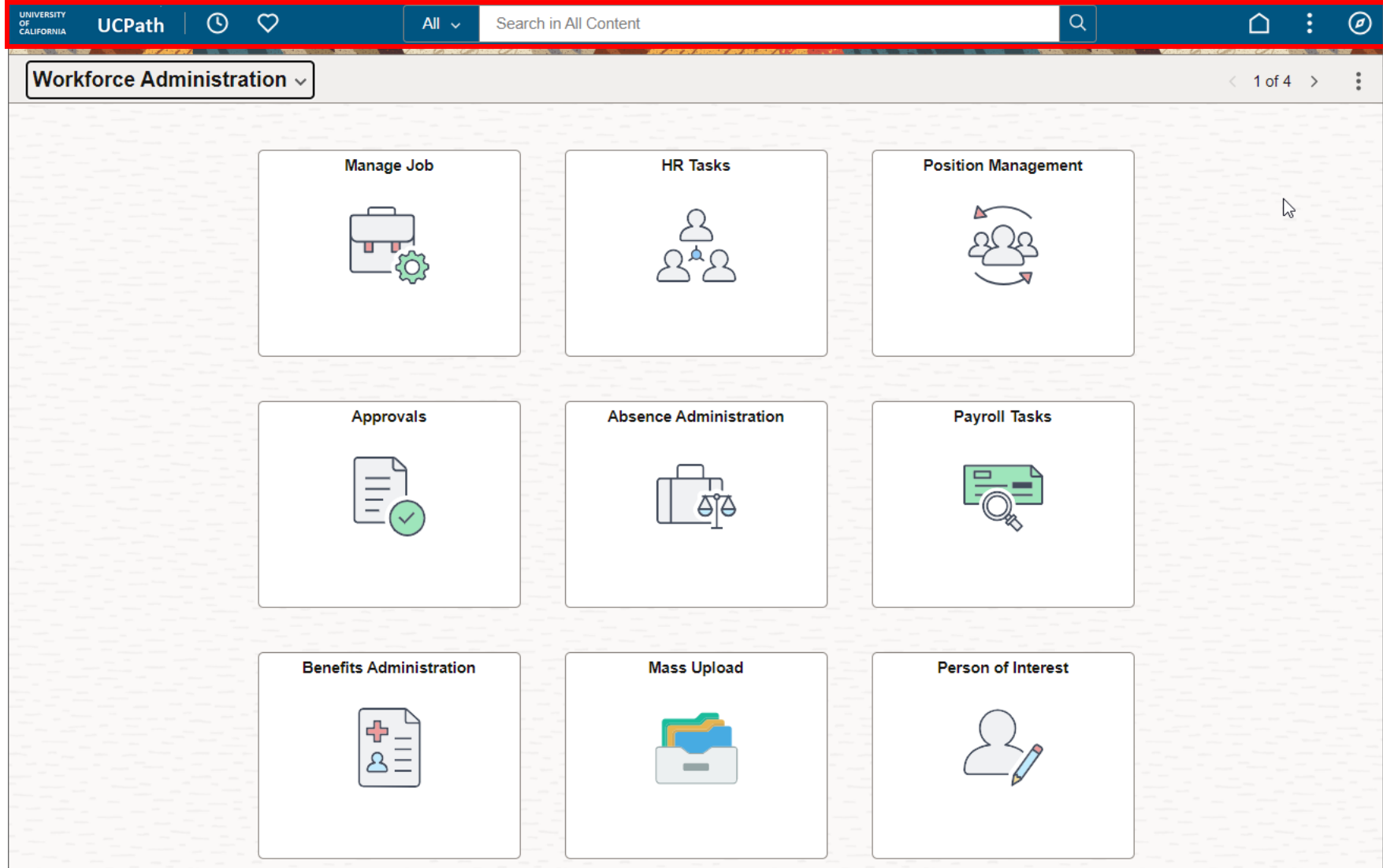
 Access Favorites

 Home

 Actions menu:  
Add Favorites, New Window, Help

 Navigator: Recently Visited, Edit Favorites, Navigation Menu

 Back button found on navigation collection pages

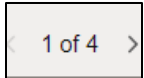


The screenshot displays the UCPath Workforce Administration interface. At the top, a dark blue navigation bar contains the University of California logo, the text 'UCPath', a clock icon, a heart icon, a dropdown menu set to 'All', a search bar with the text 'Search in All Content', and icons for home, a three-dot menu, and a compass. Below this is a light gray sub-header with a dropdown menu for 'Workforce Administration' and a page indicator '1 of 4'. The main content area features a 3x3 grid of white tiles, each with a title and an icon: 'Manage Job' (briefcase and gear), 'HR Tasks' (three people), 'Position Management' (circular arrows and people), 'Approvals' (document with checkmark), 'Absence Administration' (scales of justice), 'Payroll Tasks' (document with magnifying glass), 'Benefits Administration' (document with plus sign and person), 'Mass Upload' (folder), and 'Person of Interest' (person with pencil). A mouse cursor is visible over the 'Position Management' tile.

# HOMEPAGE UPDATES

## New Homepage Selector

Homepage selector has been moved within the content of the page (list subject to security roles)



Optional Homepage scrolling

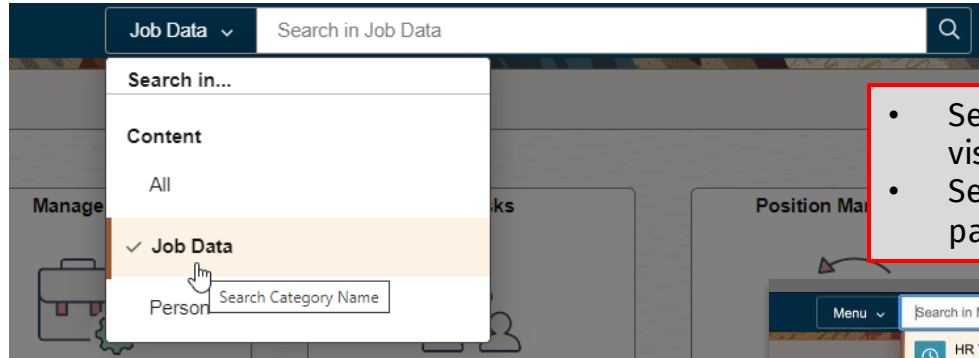


Refresh

The screenshot displays the UCPath homepage interface. At the top, the navigation bar includes the University of California logo, the 'UCPath' brand name, a clock icon, a heart icon, a dropdown menu set to 'All', a search bar labeled 'Search in All Content', and navigation icons for home, menu, and profile. Below the navigation bar, a 'New Homepage Selector' is highlighted with a red box. This selector is a dropdown menu currently showing 'Workforce Administration'. A red box also highlights the '1 of 4' scrolling indicator in the top right corner. The main content area features a grid of administrative modules, each with an icon and a title: 'Manage Job' (briefcase and gear), 'HR Tasks' (three people), 'Position Management' (circular arrows around people), 'Approvals' (document with checkmark), 'Absence Administration' (briefcase and scales), 'Payroll Tasks' (document with magnifying glass), 'Benefits Administration' (document with plus sign and person), 'Mass Upload' (folder), and 'Person of Interest' (person with pencil). A 'Refresh' icon (three vertical dots) is located in the top right corner of the main content area.

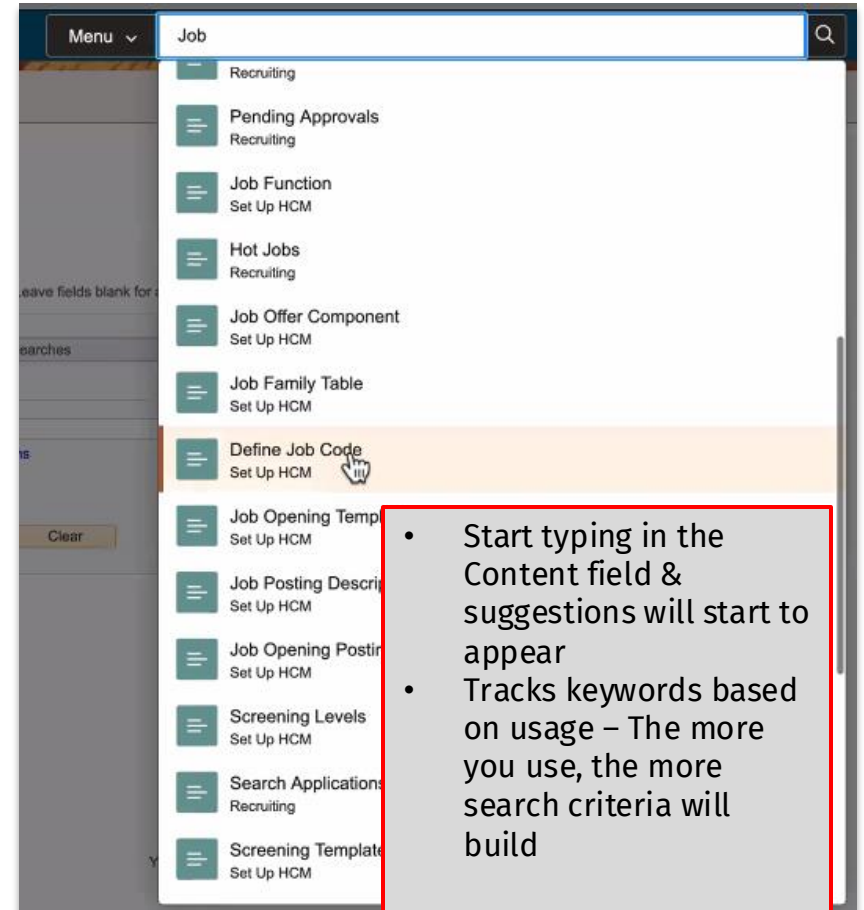
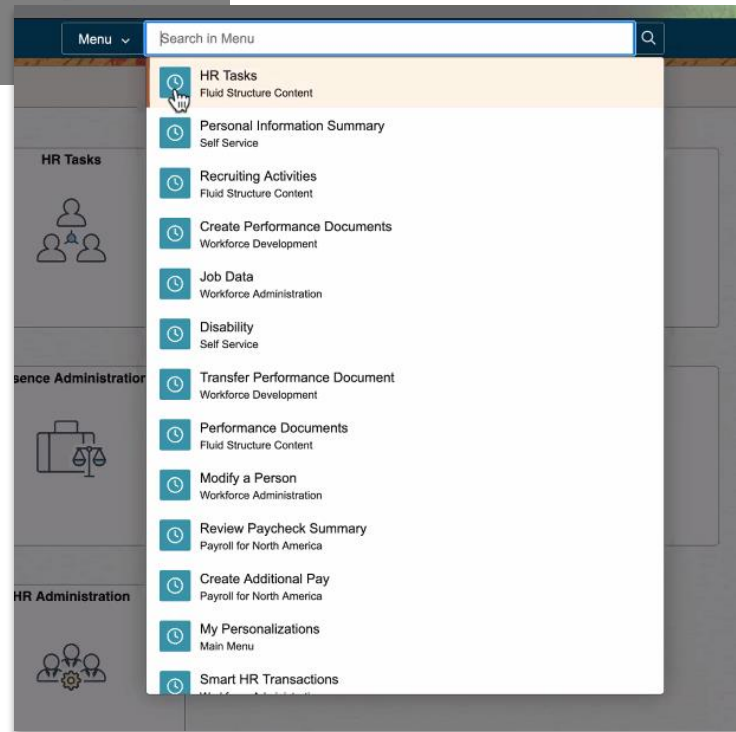
# GLOBAL SEARCH – POWERFUL SEARCH ENGINE

(Specific to accountability structure & (Lived) Name search)



- Search menu can go to recently visited pages
- Searches and returns PeopleSoft pages

- Indexed for Job and Person data
  - Search results based on security access
- Content Search:** Looks for matching pages, Navigation Collections or saved search results
- Job Data Filter:** Looks for matching Job Data
- Person Filter:** Looks for matching employee data

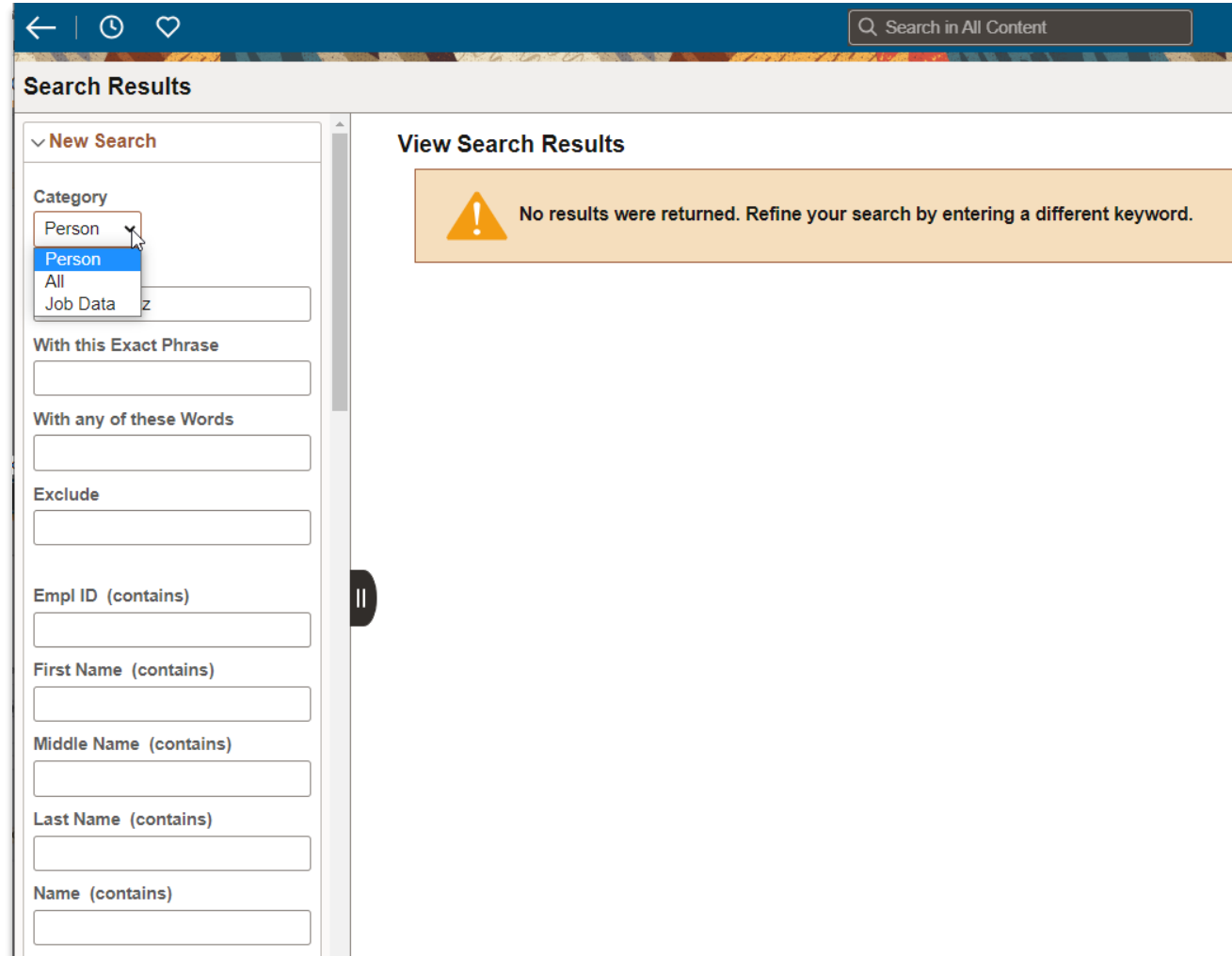


- Start typing in the Content field & suggestions will start to appear
- Tracks keywords based on usage – The more you use, the more search criteria will build

# GLOBAL SEARCH – REFINE SEARCH CRITERIA

(Specific to accountability structure & (Lived) Name search)

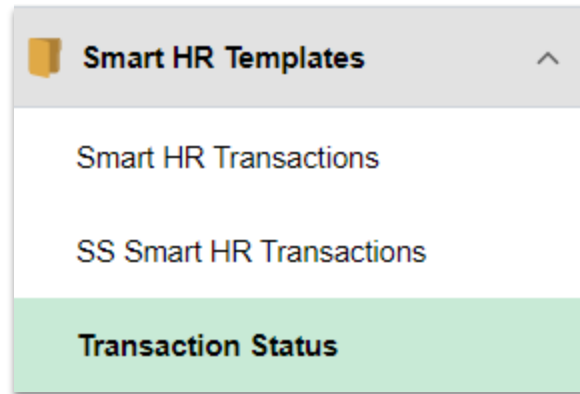
**Expanded Search** displays if search results do not find any results



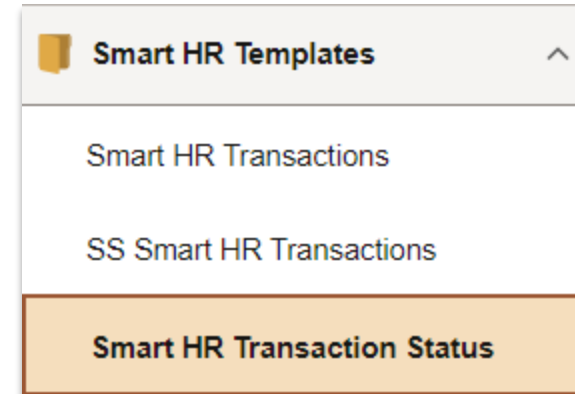
The screenshot shows a search interface with a top navigation bar containing a search box labeled "Search in All Content". Below the navigation bar is a "Search Results" section. On the left, there is a "New Search" panel with several input fields: "Category" (with a dropdown menu showing "Person", "All", and "Job Data"), "With this Exact Phrase", "With any of these Words", "Exclude", "Empl ID (contains)", "First Name (contains)", "Middle Name (contains)", "Last Name (contains)", and "Name (contains)". On the right, the "View Search Results" section displays a yellow warning message: "No results were returned. Refine your search by entering a different keyword."

# LABEL CHANGES – NAVIGATION COLLECTION

## Current Label



## New Label



### Page Navigation:

Main Menu > PeopleSoft Homepage > HR Tasks > Smart HR Templates > ***Smart HR Transaction Status***



**DEMONSTRATION**

*Global Search*

# WHAT'S HYPERCARE GOING TO LOOK LIKE?

- **Optional Hypercare drop-in labs**
  - Wednesdays June 21 – July 26 9:00 AM – 10:00 AM
- **General updates**
- **Demos and Walk-throughs**
  - Q&A Sessions
  - Sessions will be recorded

Visit <https://ucpath.ucr.edu/livedname> for more information & training resources.



# WRAP-UP



# TOOLS AND RESOURCES

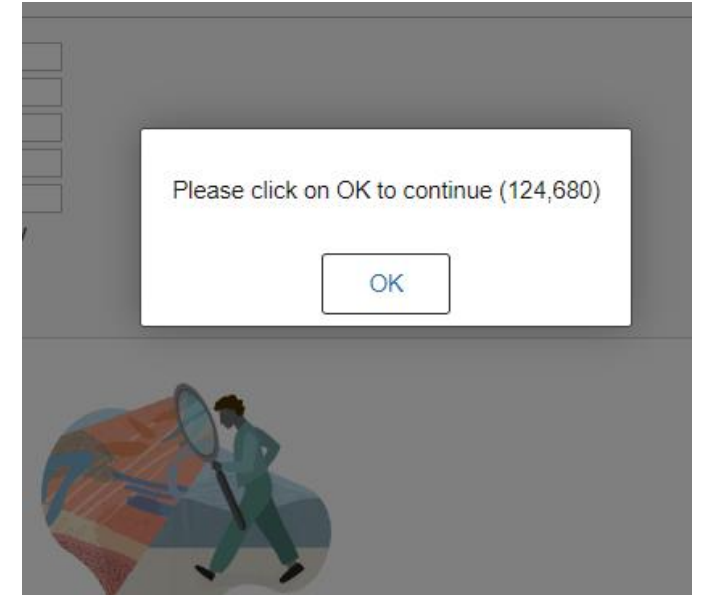
- Lived Name Matrix
  - Dept HR Inquirer / Absence Management Inquiry Roles

Workforce Administration Homepage	Search Criteria	Search Results	Display on Page	EMPLID	Inquirer
Person Org Summary	Lived	Lived	Lived	X	X
Contract Pay>Contract Payment Details	Lived	Lived	Lived	X	X
Contract Pay>Update Contract Pay NA	Lived	Lived	Lived	X	X
Job Data Related>Job Data	Lived, Legal	Lived, Legal	Lived	X	X
Job Data Related>UC Employee Review	Lived	Lived	Lived	X	X
Job Data Related>Workforce Job Summary	Lived, Legal	Lived, Legal	Lived	X	X
Personal Data Related>Person Checklist	Lived	Lived	Lived	X	X
Personal Data Related>Person Profiles	Lived	Lived	Lived	X	X
Personal Data Related>Security Clearance	Lived	Lived	Lived	X	X
Smart HR Templates>Smart HR Transaction Status	Lived	Lived	Lived	X	X
Extended Absence>Absence Event	Lived	Lived	Lived	X	X
Extended Absence>Extended Absence Trans History	Lived	Lived	Lived	X	X
Manage Accruals/Balances>Admin – Review Absence Balance	Lived	Lived	Lived	X	X
Manage Accruals/Balances>Career & Benefits Elig Hrs INQ	Lived	Lived	Lived	X	X
Manage Accruals/Balances>Manage Accruals	–	Lived	Lived		X
Admin - Review Absence Balance	Lived	Lived	Lived	X	X

Visit <https://ucpath.ucr.edu/livedname> for more information & training resources.

# JUNE RELEASE ORACLE DEFECT

- **Description:**  
**System error when navigating in the FLUID pages**
  - Random and intermittent (20-50 clicks)
  - Does not impact Employee Self Service or Manager Self Service
  - Does not impact transactions – No data integrity, no private information impact
  - Introduced by the PUM44 Configurable Search
    - Fix will be coming
  - Workaround is available





# QUESTIONS



**THANK YOU**