LIVED NAME & UCPATH UPGRADE TRANSACTOR TRAINING

June 16, 2023

UCR Campus Support Center

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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)

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WELCOME & INTRODUCTIONS

UCR Path Campus Support Center (CSC)

- **UCPath System Implementation Suppo**
  - 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

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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

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REQUIRED HR TRAINING FOR LEGAL NAME ACCESS

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

- **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.

WHEN?

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

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UCPATH LIVED NAME

Search Impacts

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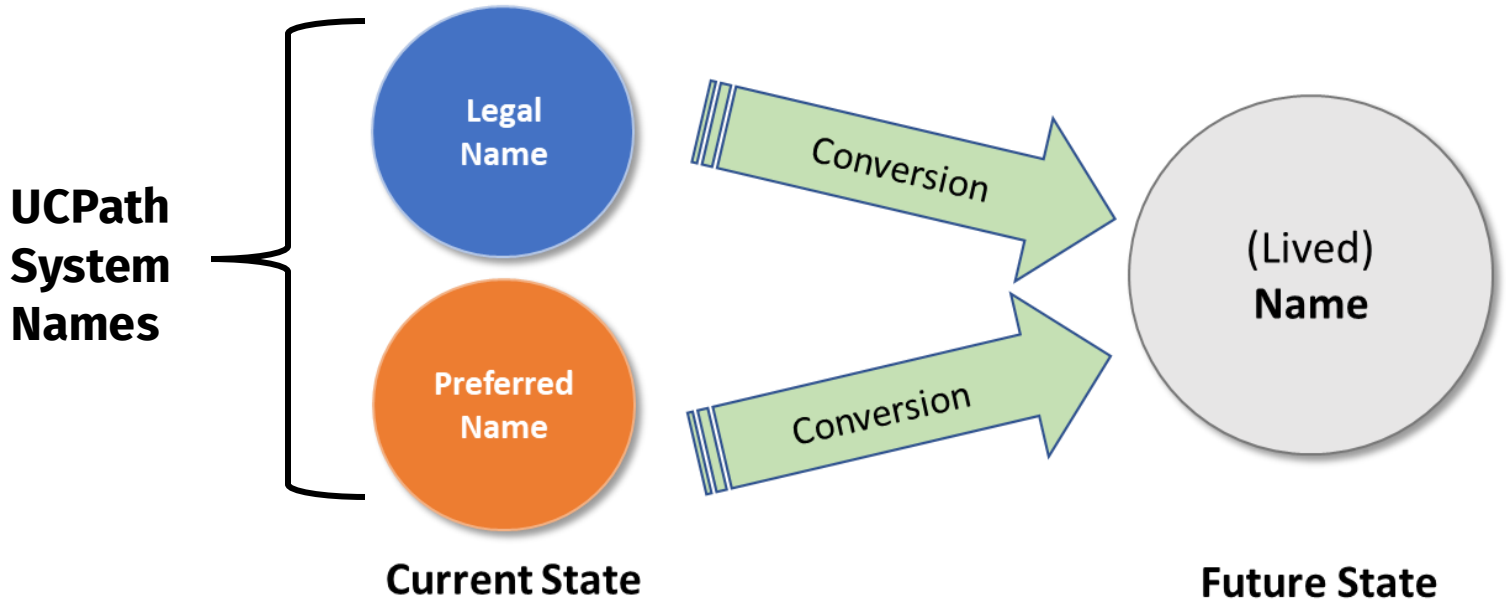
LEGAL NAME/PREFERRED NAME CONVERSION

Display Name

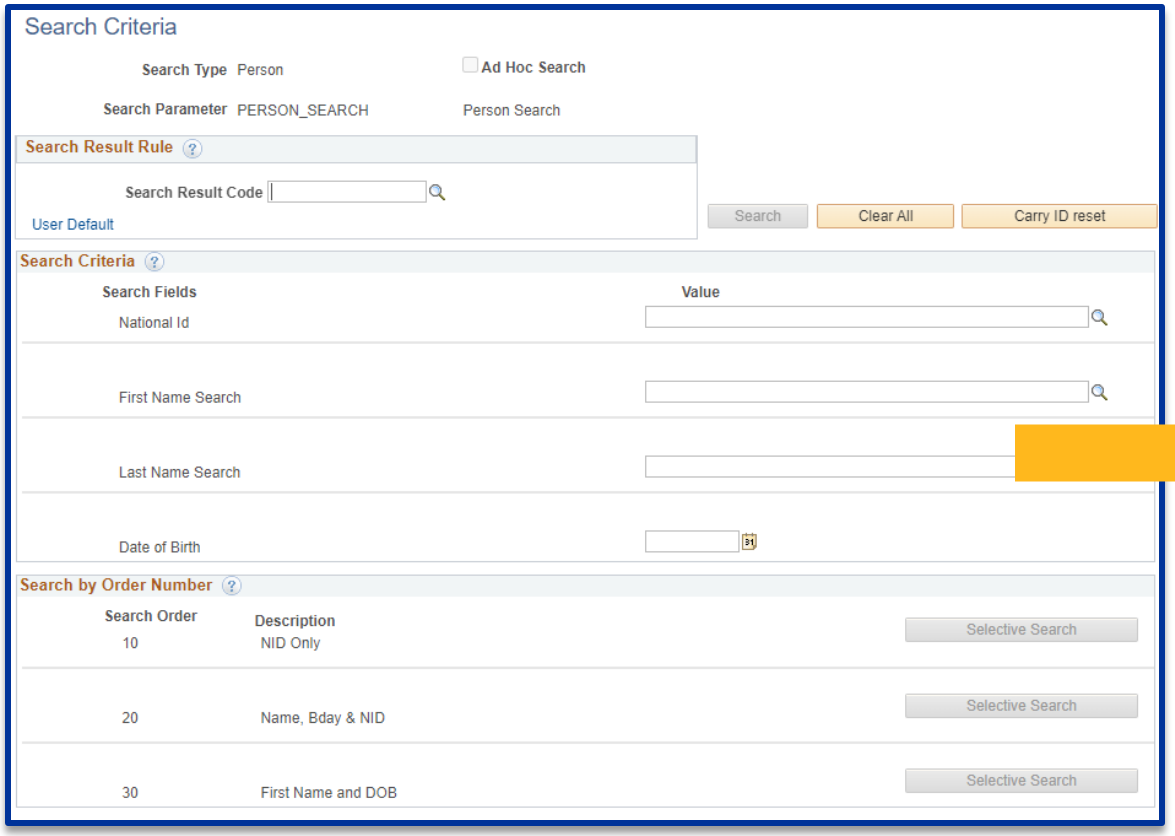


- The ‘Name’ field will populate the display name with the employee’s self-chosen name or their legal name if a self-chosen name is not provided
- UCPath will only use the legal name when necessary for regulatory and business purposes
- The Search, Search Results and Name on the page have been mostly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

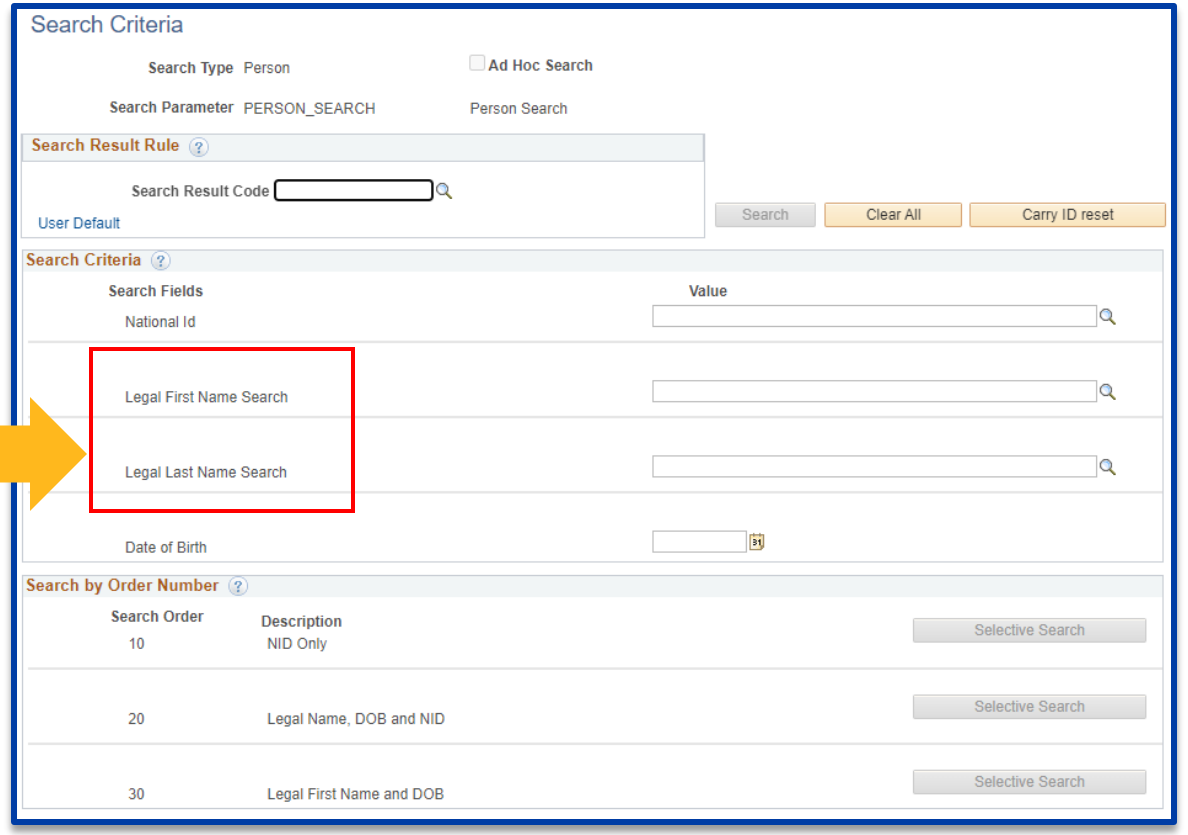
SEARCH PERSON

(System-wide search access & Legal Name search)

Current State



Future State



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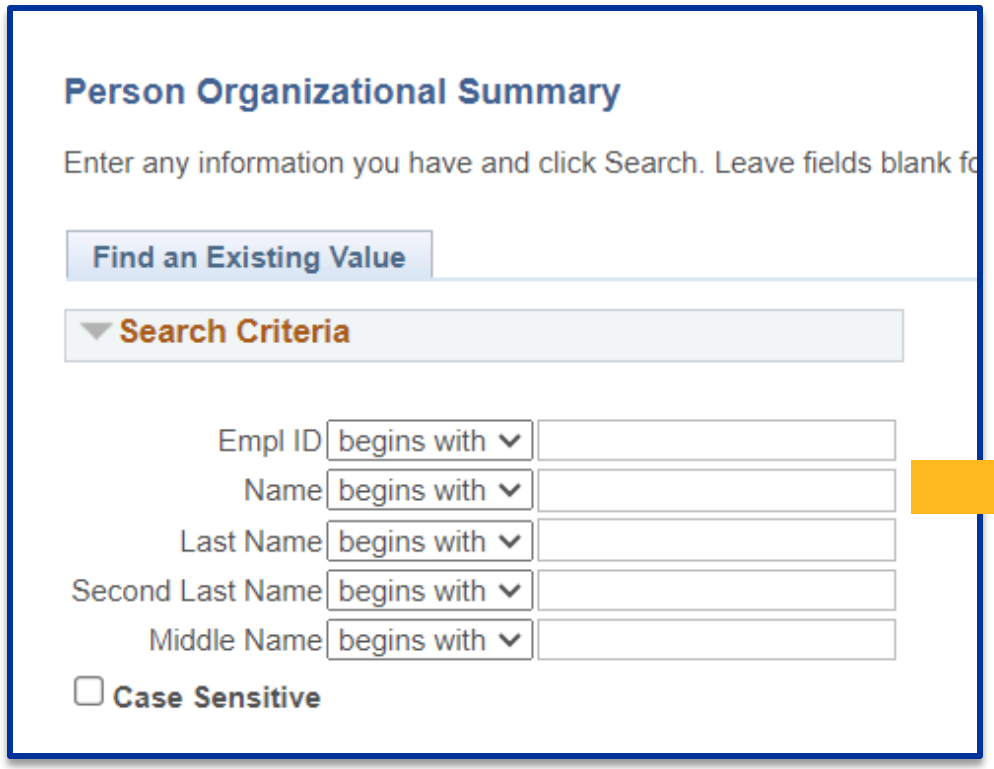
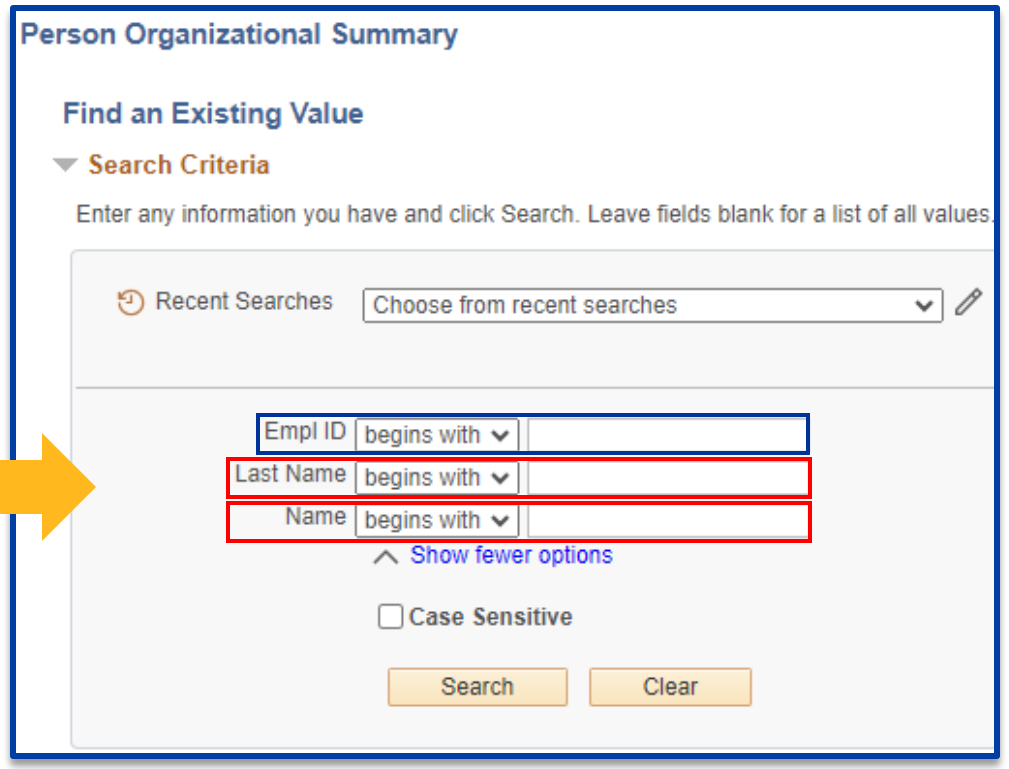
PERSON ORG SUMMARY

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

Current State



Future State



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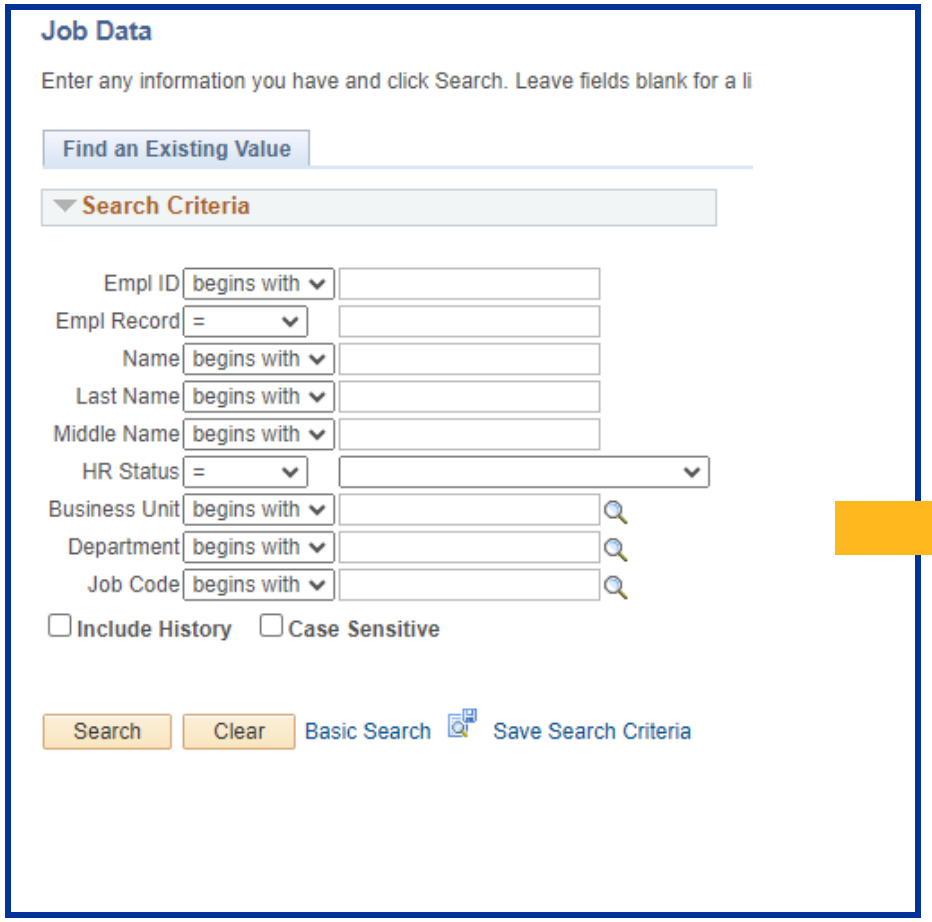
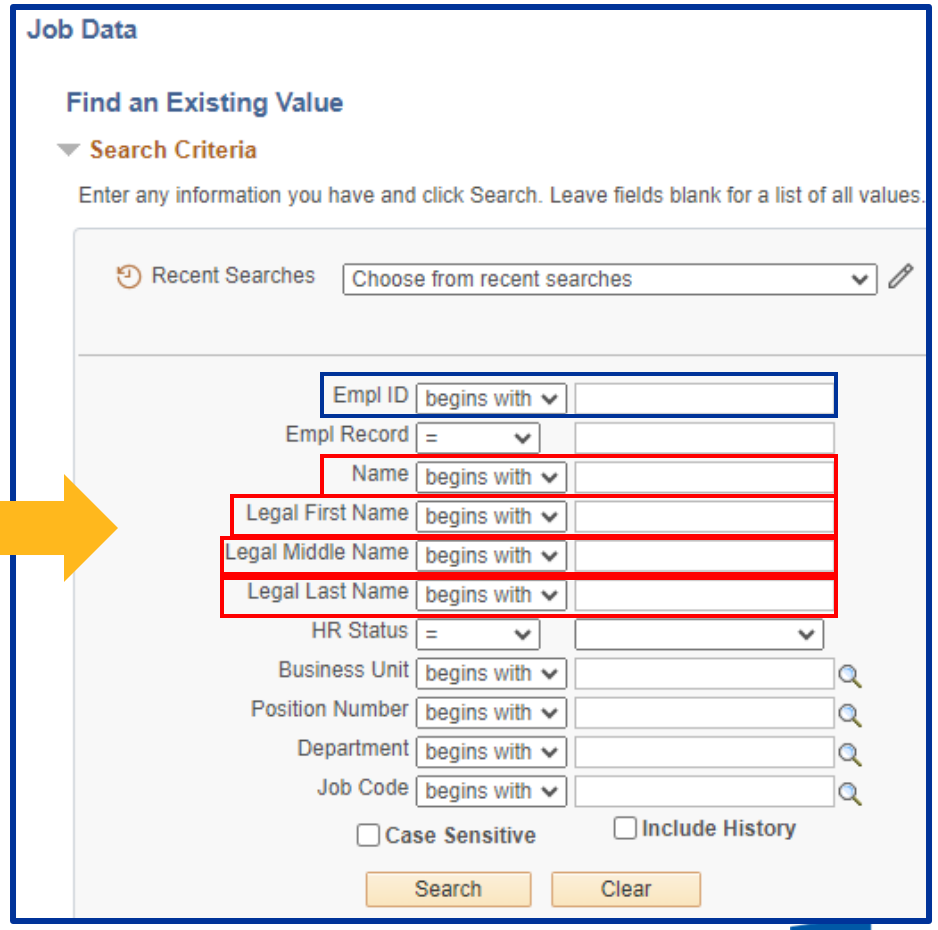
JOB DATA RELATED > JOB DATA

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

Current State



Future State



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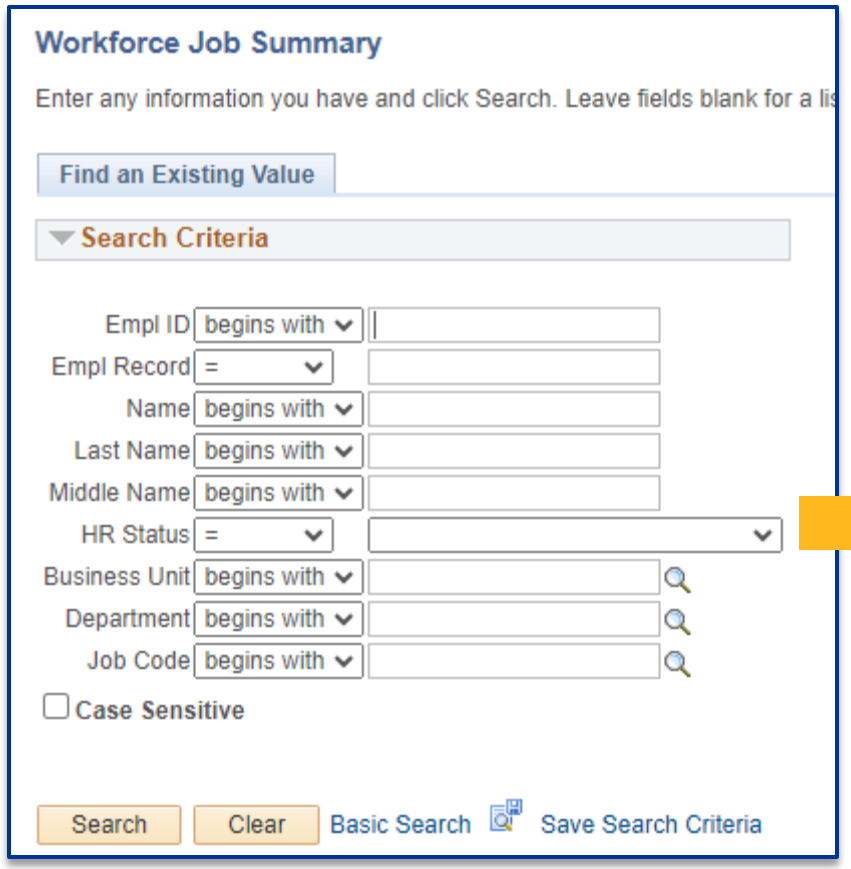
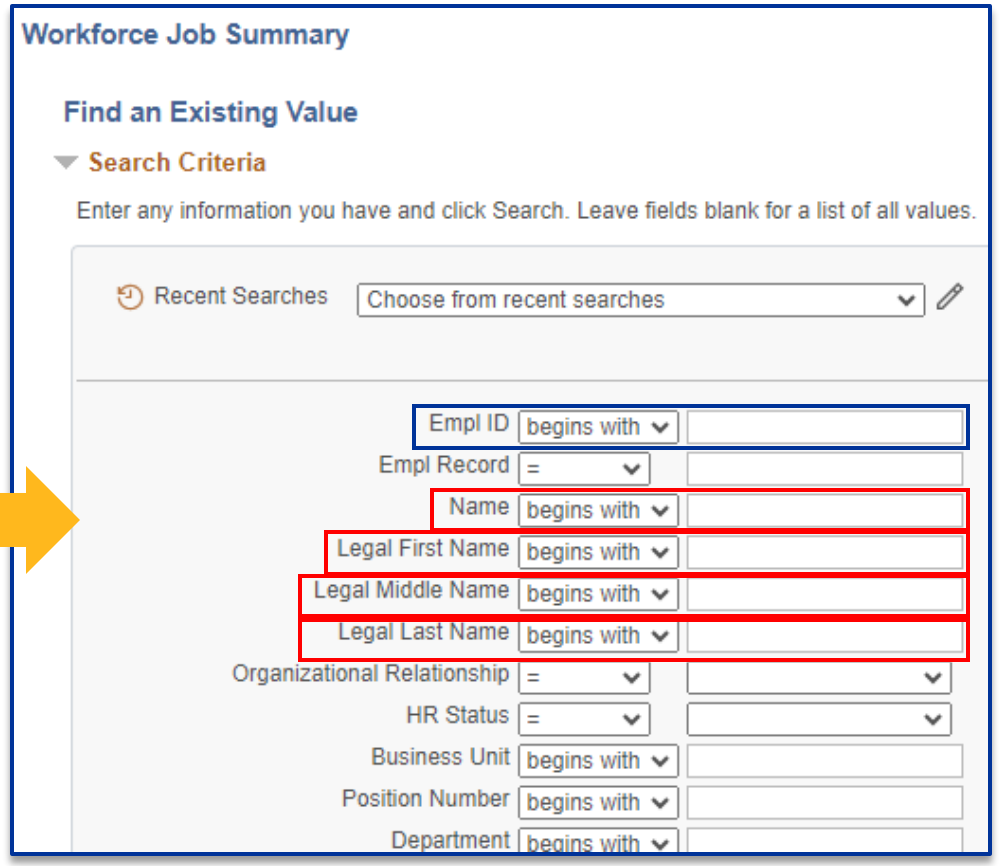
JOB DATA RELATED > WORKFORCE JOB SUMMARY

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

Current State



Future State



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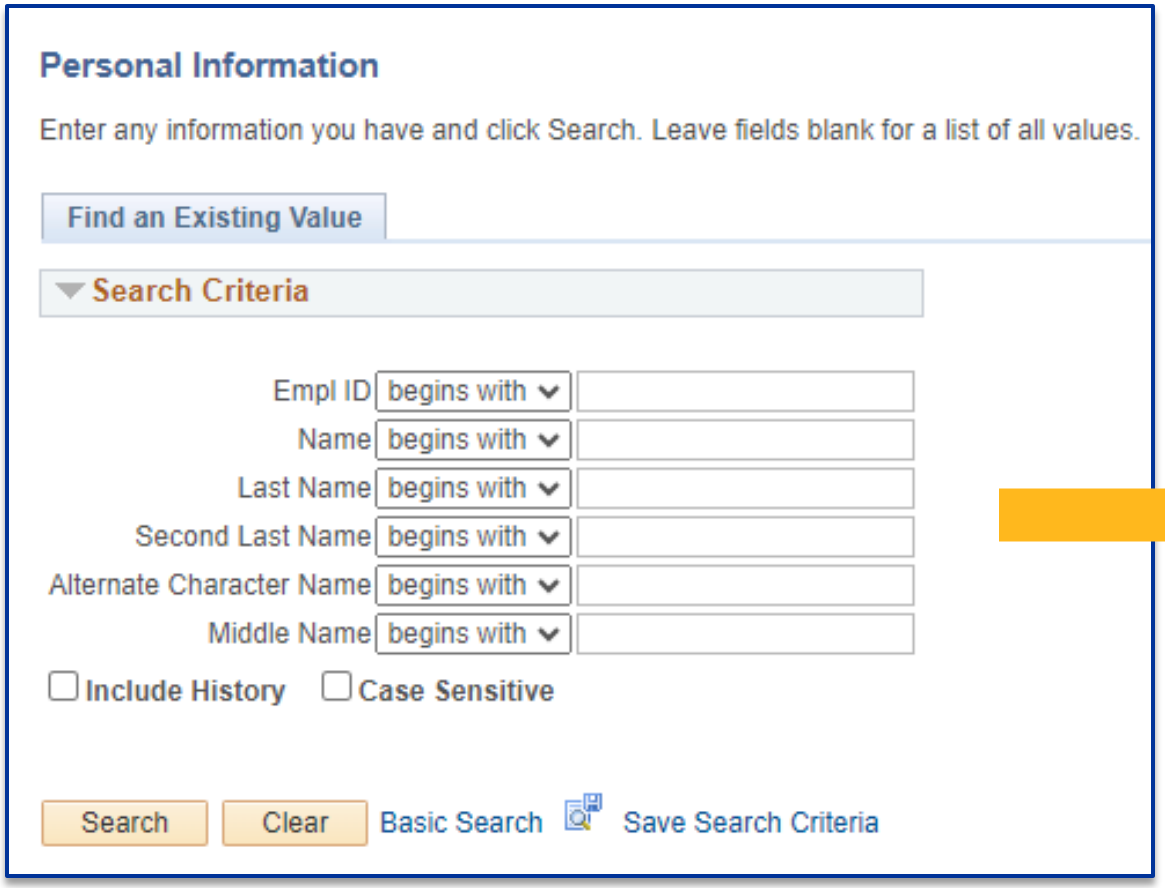
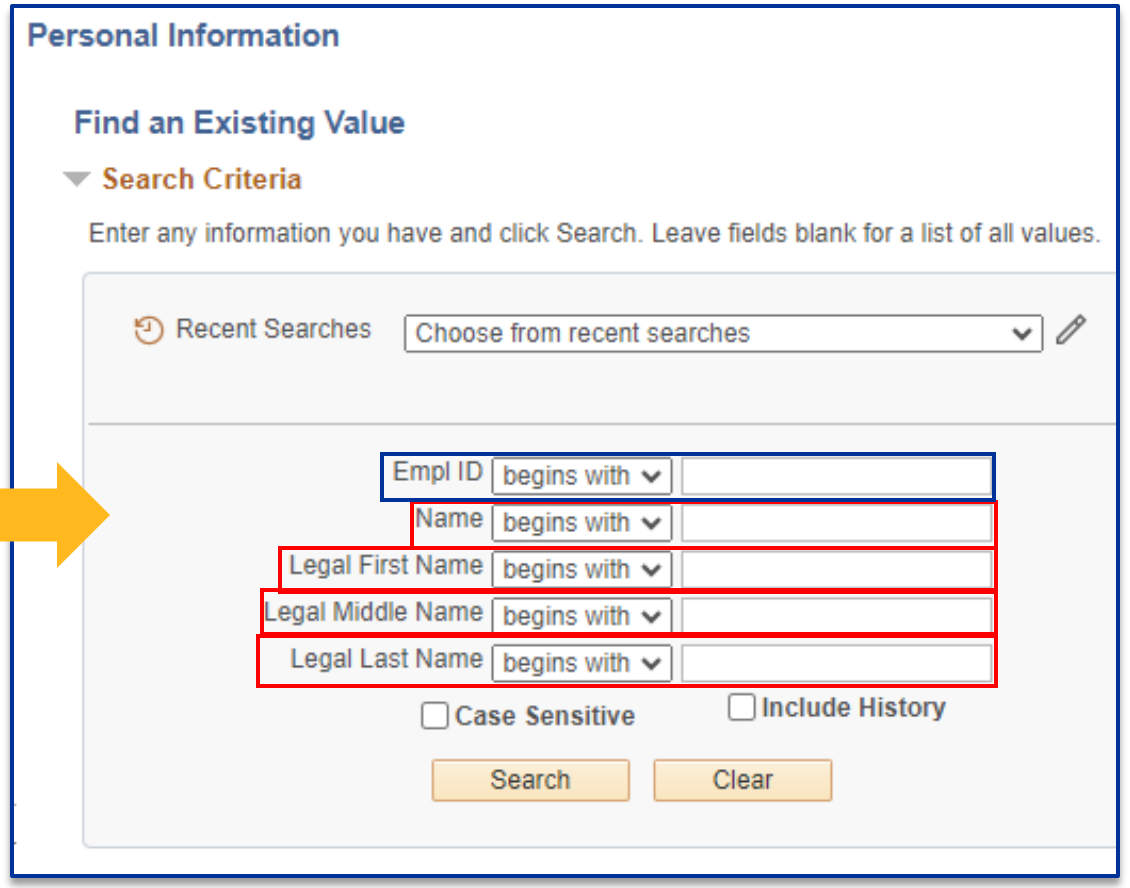
PERSONAL DATA RELATED > MODIFY A PERSON

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

Current State



Future State



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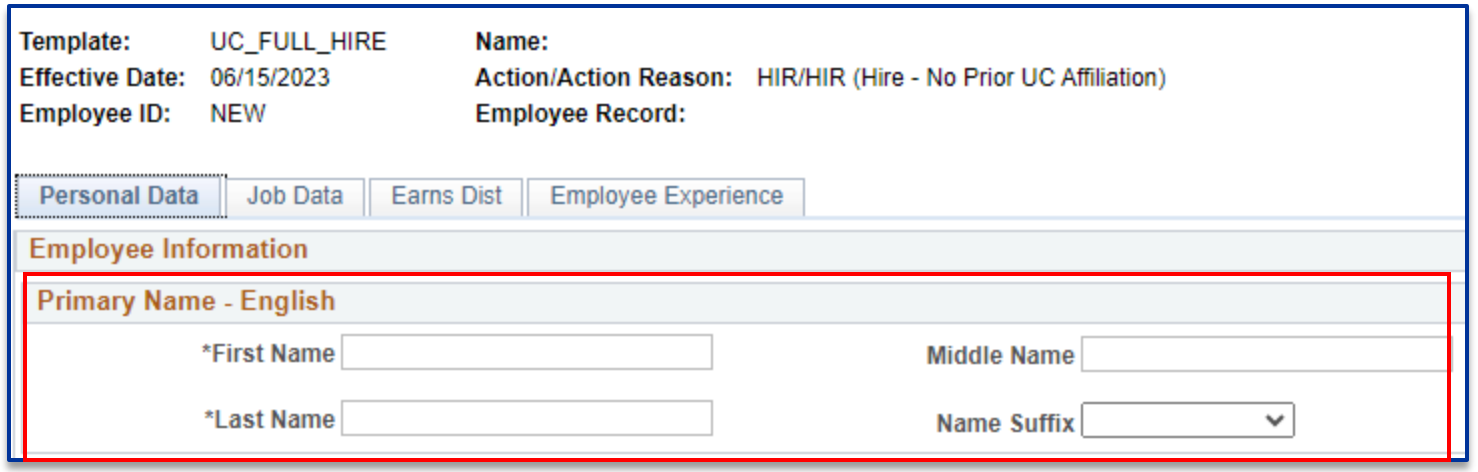
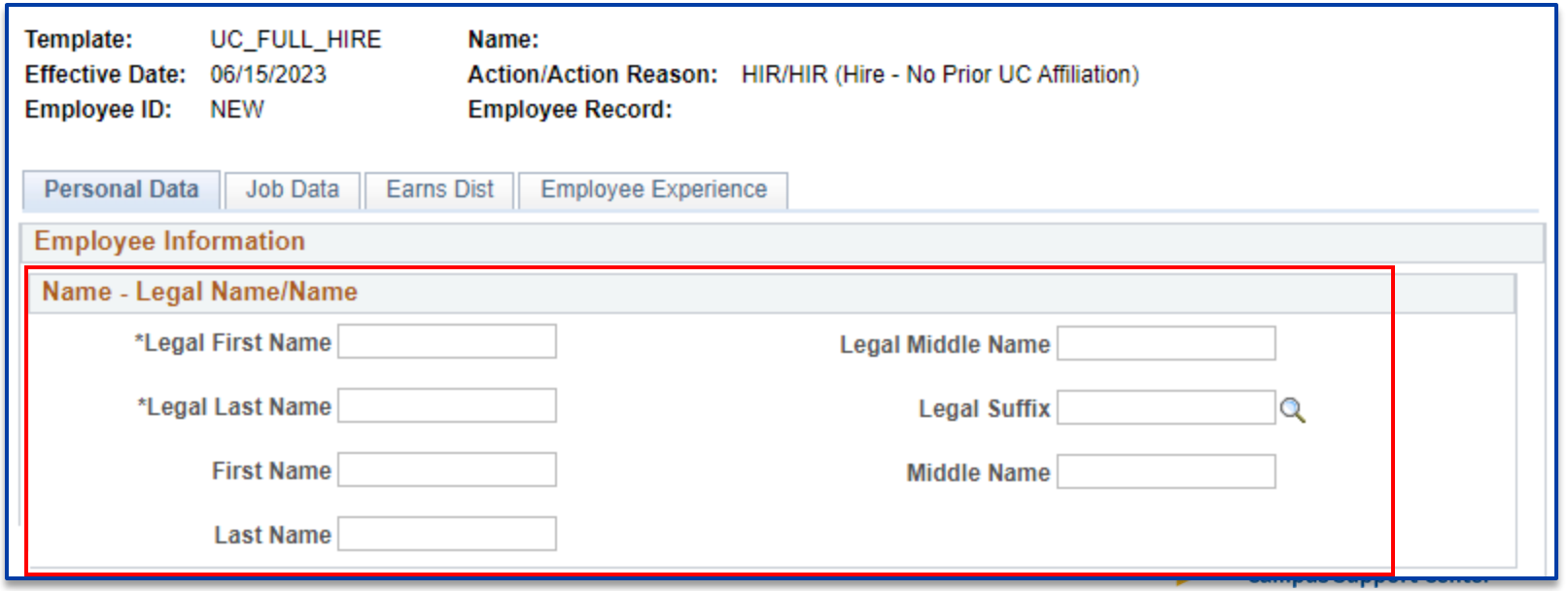
NEW FIELDS ON FAMILIAR PAGES



Current State: The template label indicates First, Middle and Last Name

Future State: The template label indicates Legal First Name, Legal Middle Name, Legal Last Name, First Name, Middle Name, and Last Name



A NOTE ON CONCURRENT HIRE & REHIRE

- The existing employee may or may not have a (Lived) Name in previous job record(s)
- The system now allows a self-chosen name to be added OR *changed* in all the templates
- If entering a (Lived) name in any of the Smart HR Templates, this will be considered the latest dated row and this will now become the display name
- An employee can only have 1 (Lived) name in the system.

DEMONSTRATION

Lived Name Search

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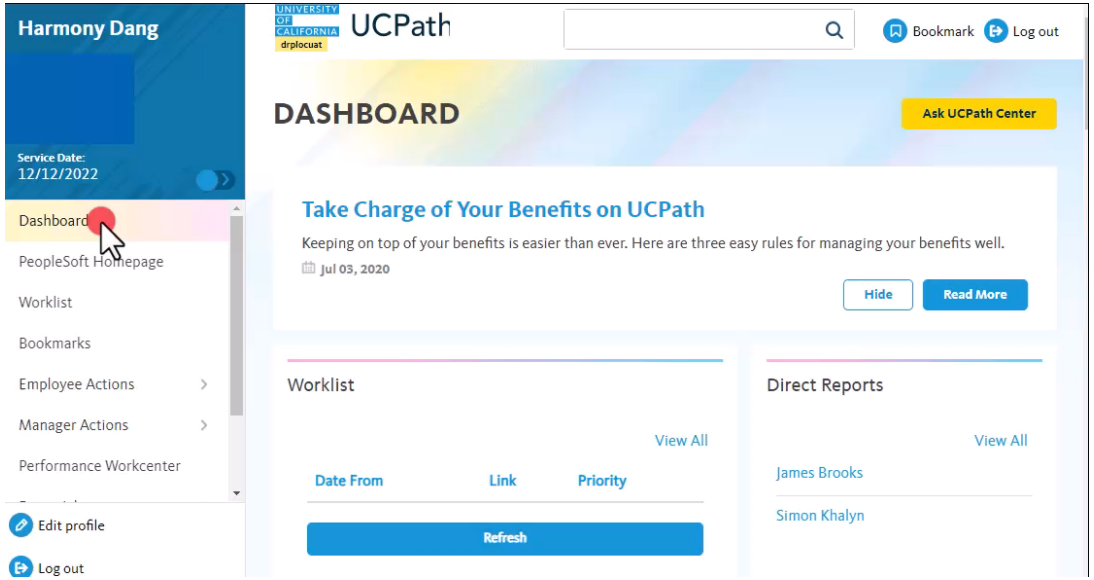
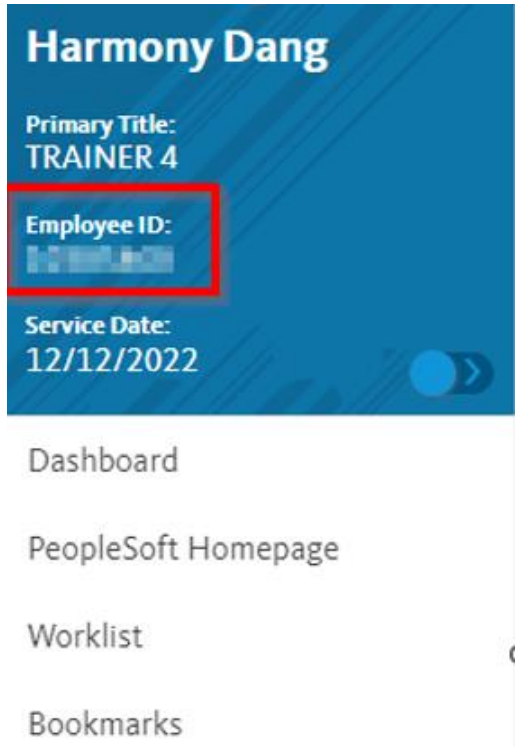
EMPLIDs GO A LONG WAY...

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”



ANNUAL UCPATH UPGRADE

PUM44

Interface Changes

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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

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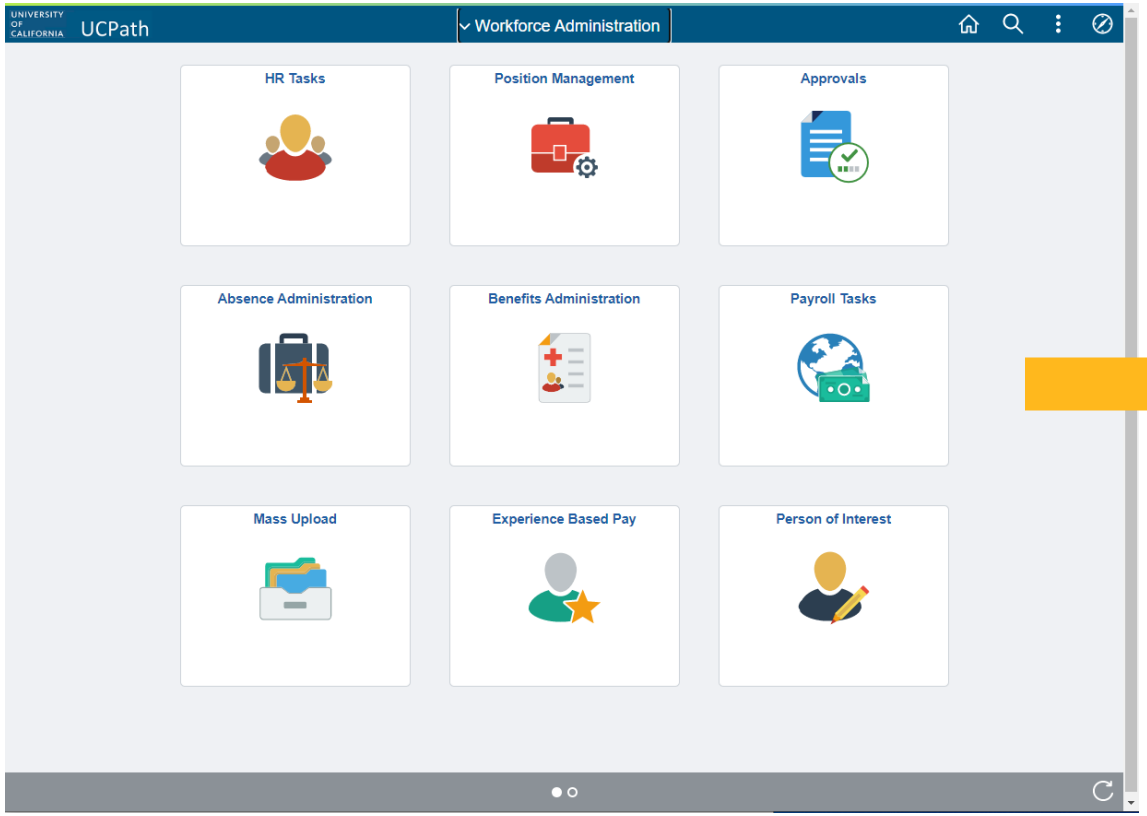
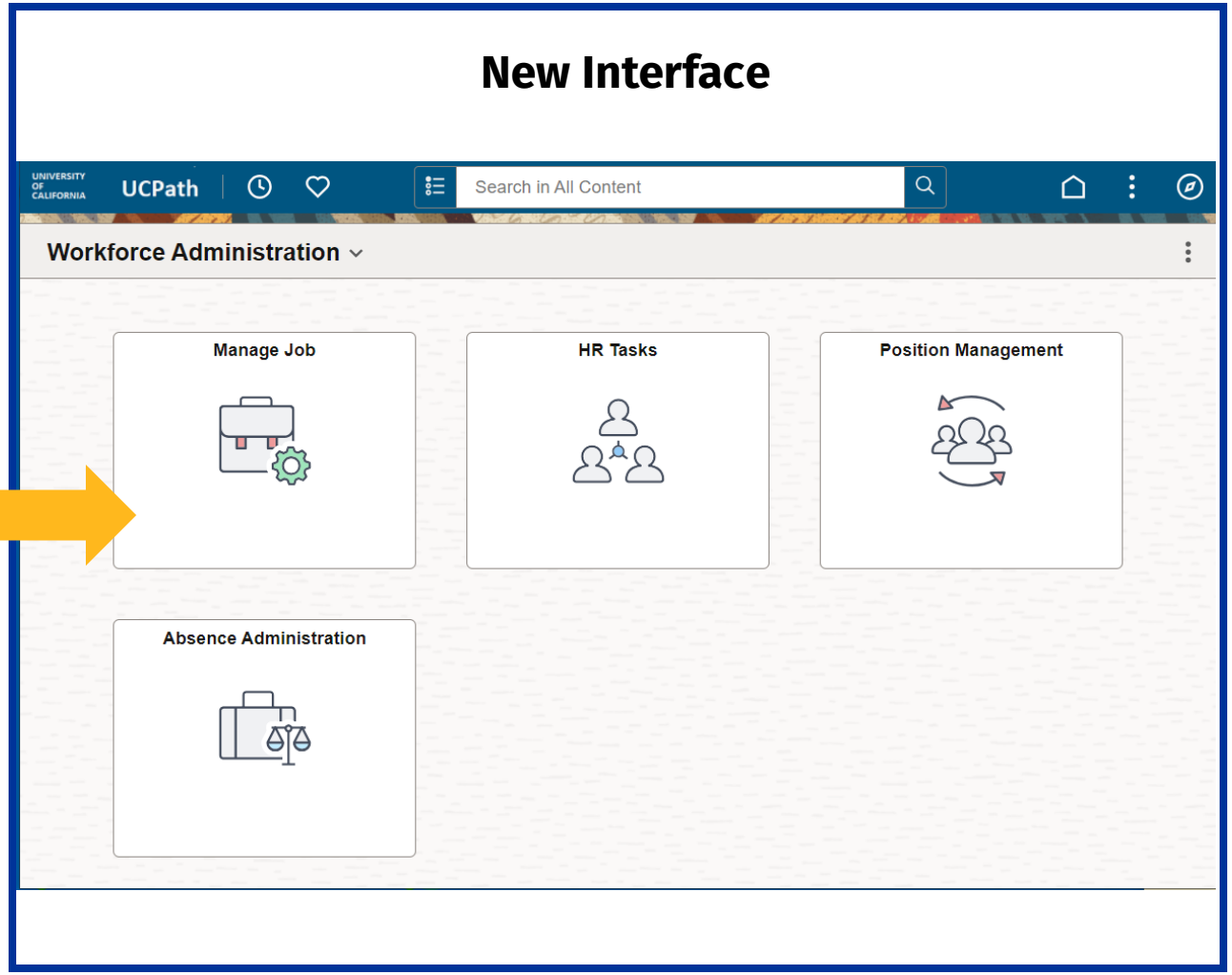
INTERFACE CHANGES

Current Interface



New Interface



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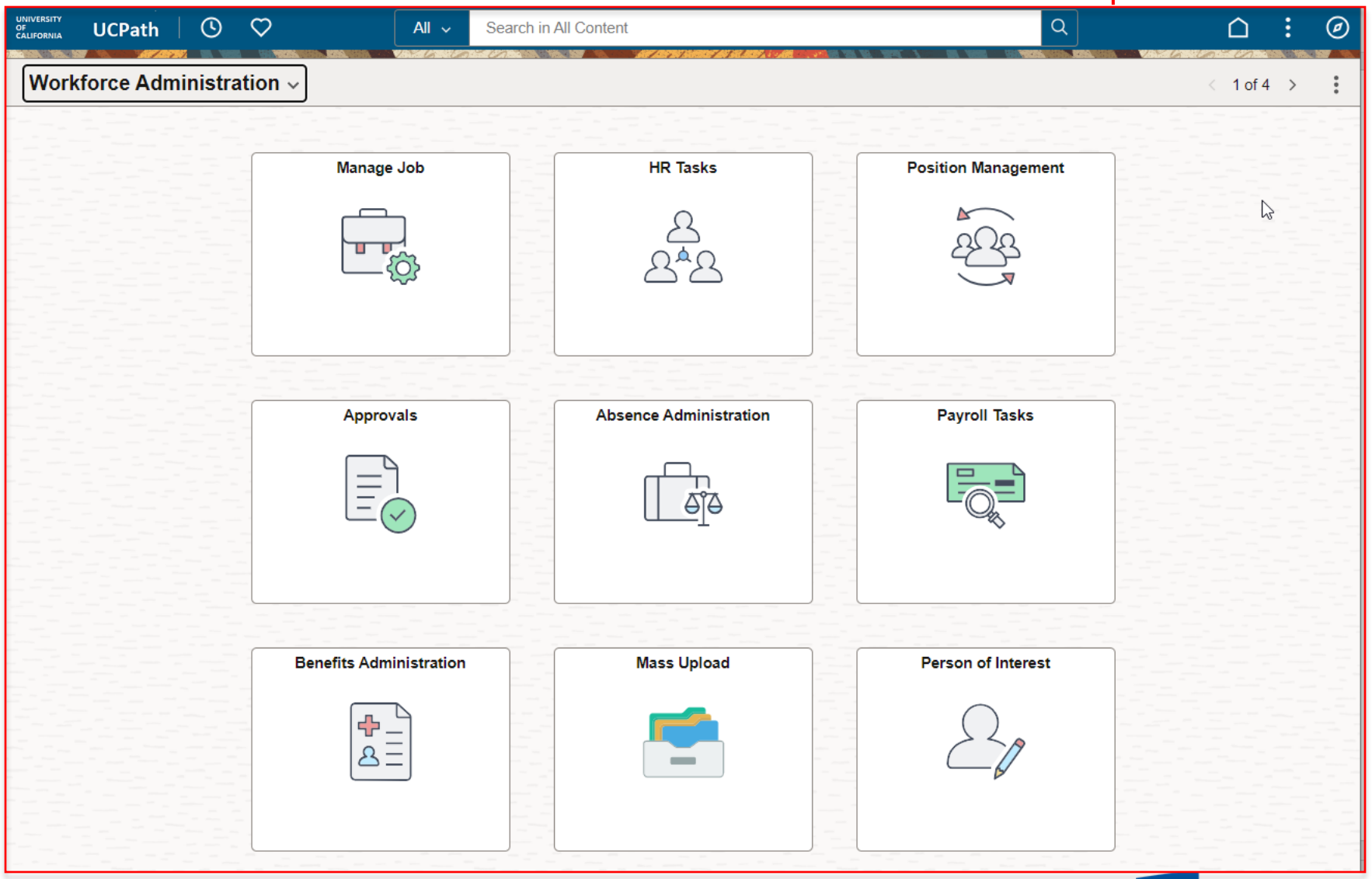
HOMEPAGE UPDATES

PUM44 Upgrade updated for accessibility (icons & color theme)

- Homepages
- Tiles
- Navigation Collections

Navigation will not change

New Color Theme



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HOMEPAGE UPDATES

New Quick Access Bar

Displays the 10 most recently visited pages

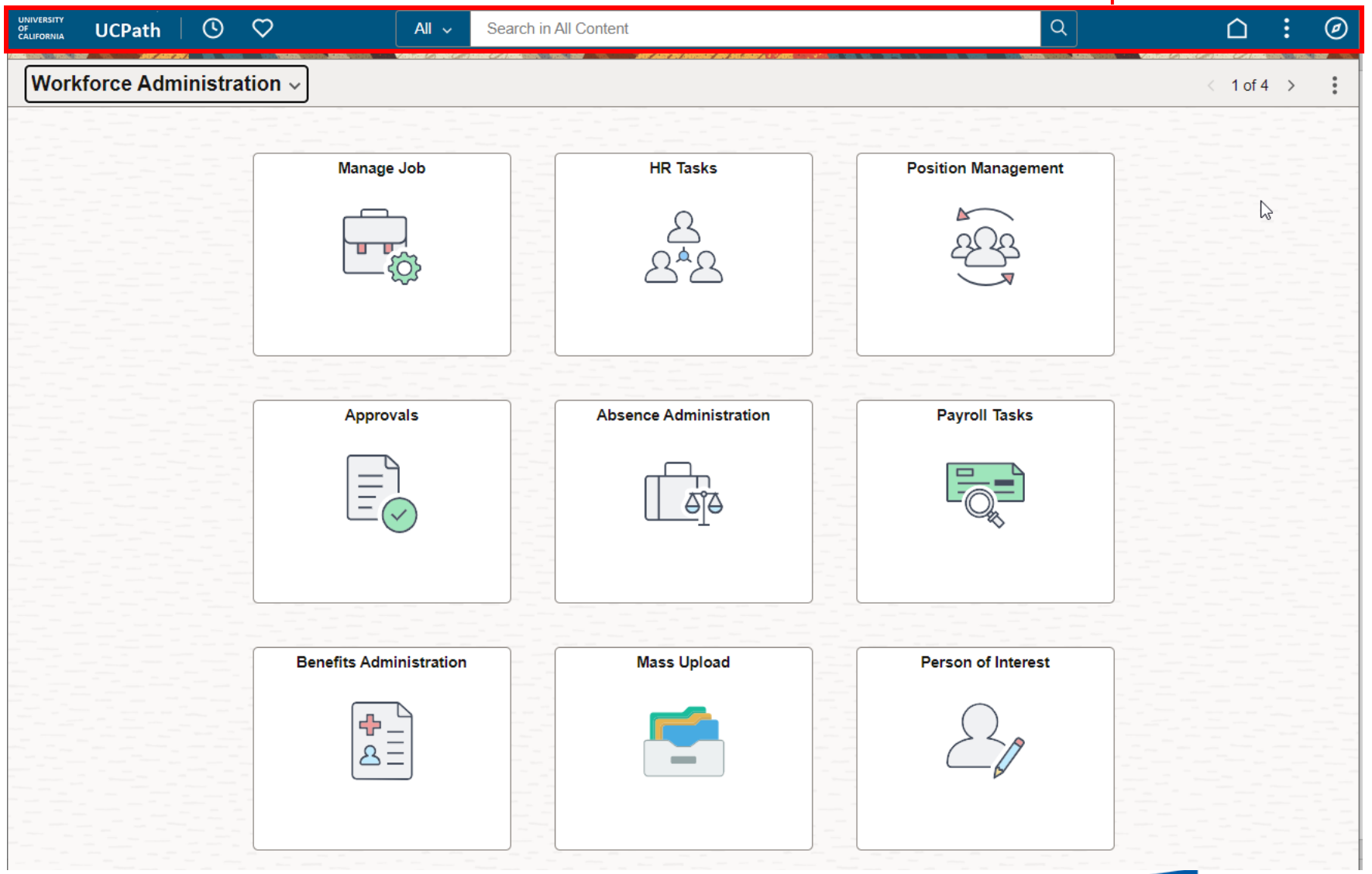
Access Favorites

Home

Actions menu: Add Favorites, New Window, Help

Navigator: Recently Visited, Edit Favorites, Navigation Menu

Back button found on navigation collection pages



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HOMEPAGE UPDATES

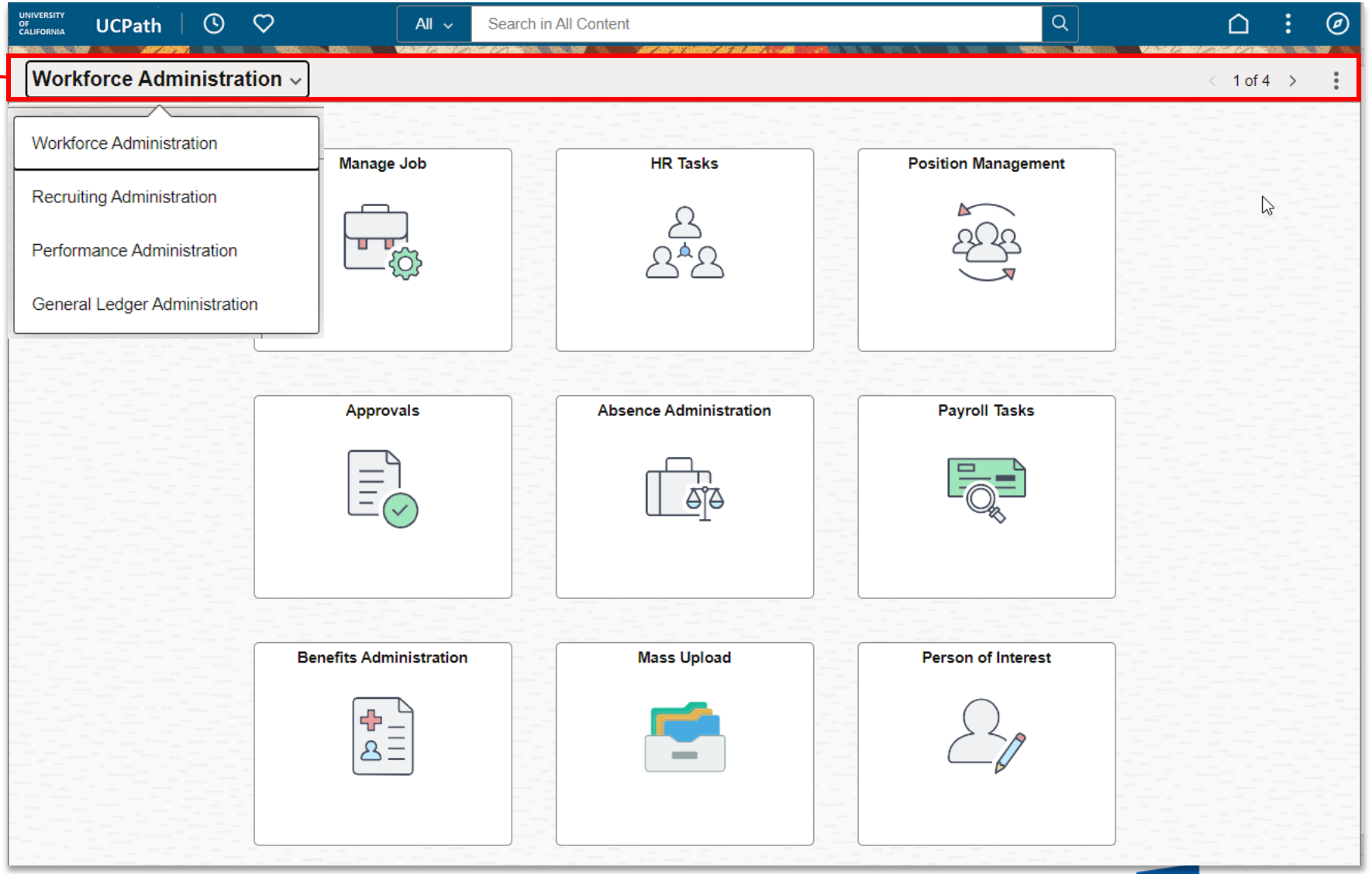
New Homepage Selector

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

1 of 4

Optional Homepage scrolling

Refresh



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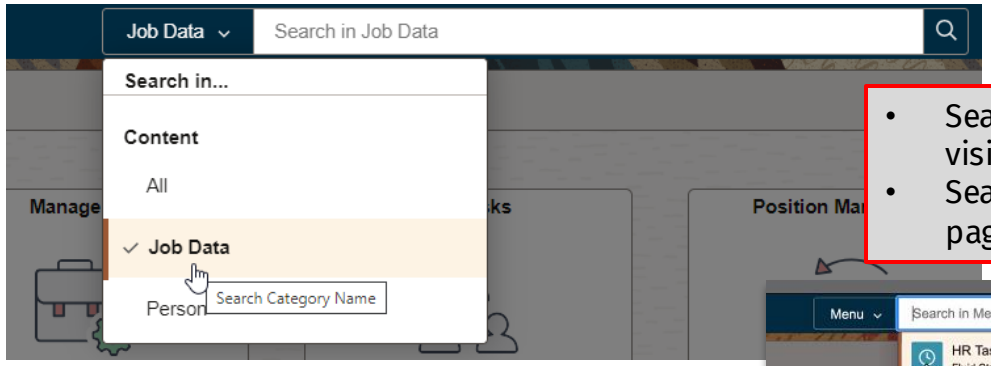
GLOBAL SEARCH – POWERFUL SEARCH ENGINE

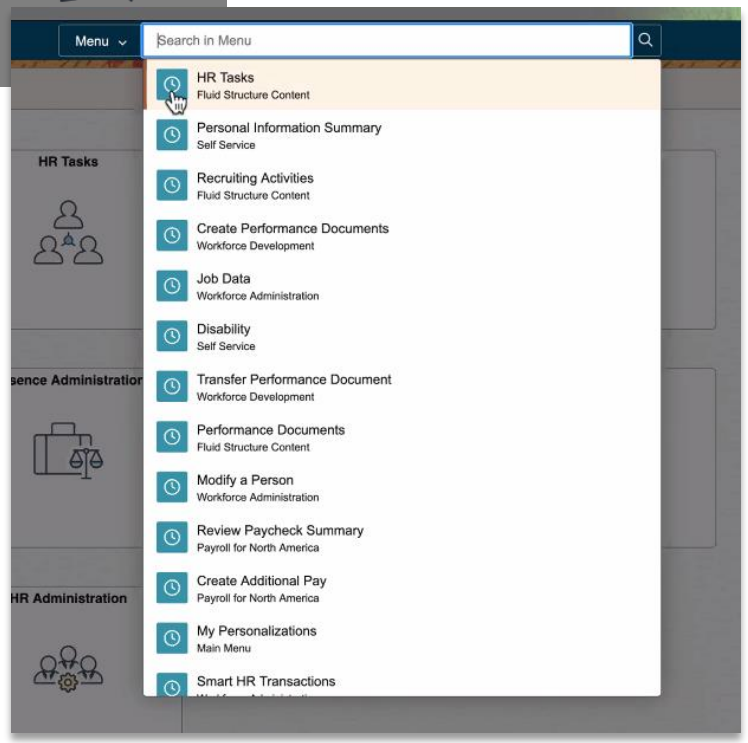
(Specific to accountability structure & (Lived) Name search)

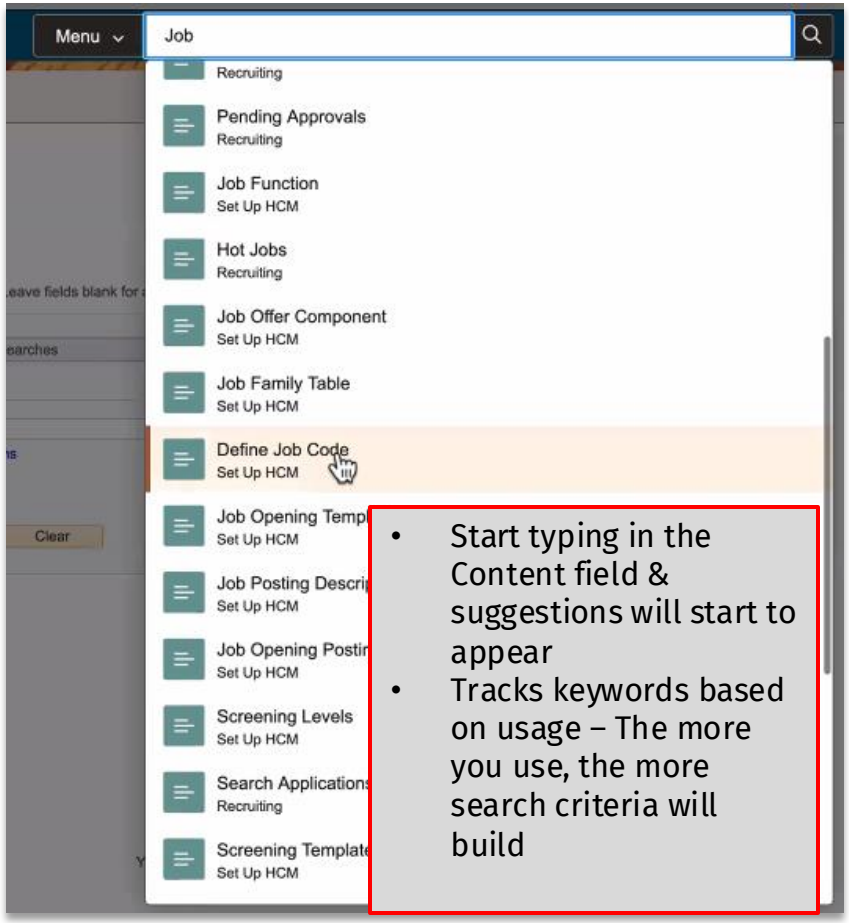


- Indexed for Job and Person data
- Search results based on security access

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

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





- 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

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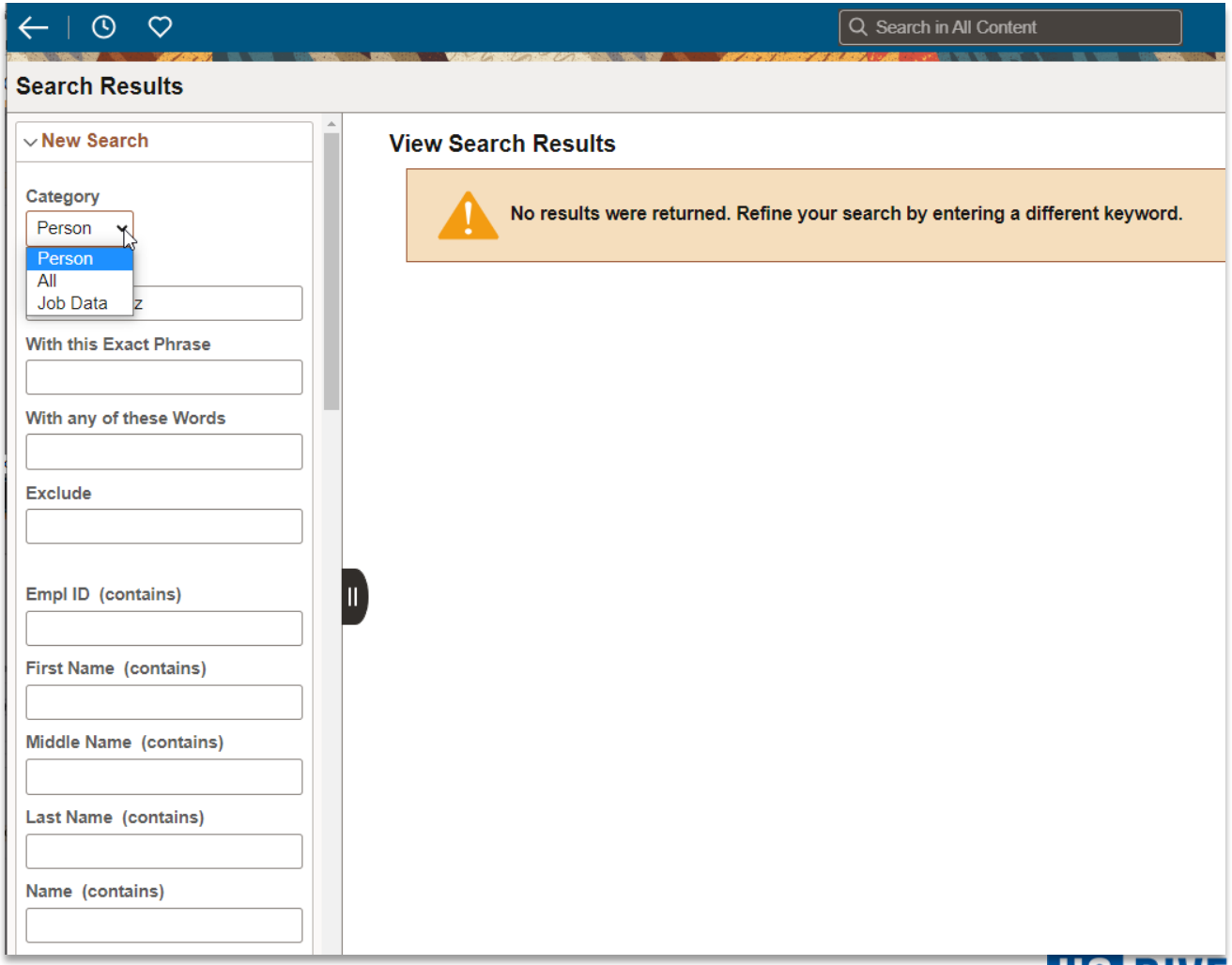
GLOBAL SEARCH – REFINE SEARCH CRITERIA

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

Expanded Search displays if search results do not find any results



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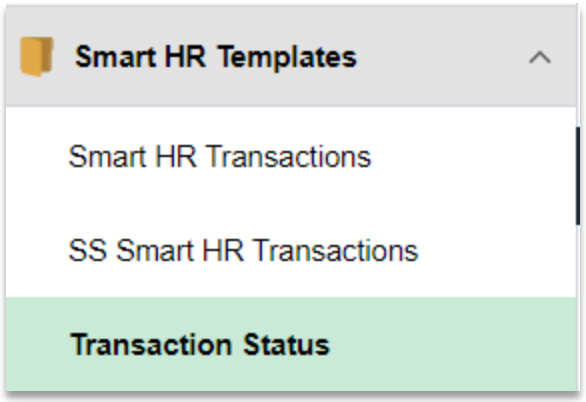
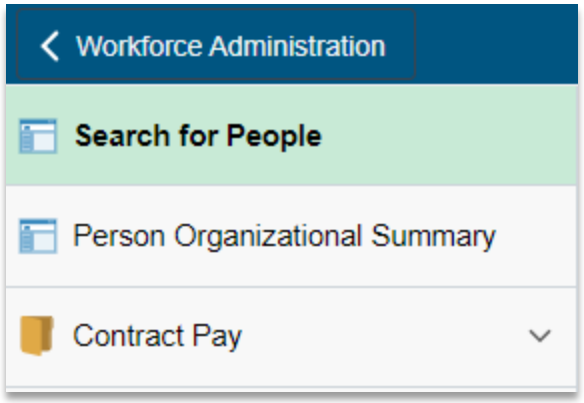
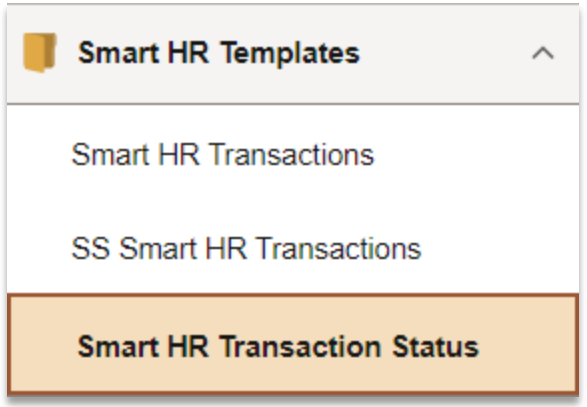
LABEL CHANGES – NAVIGATION COLLECTION

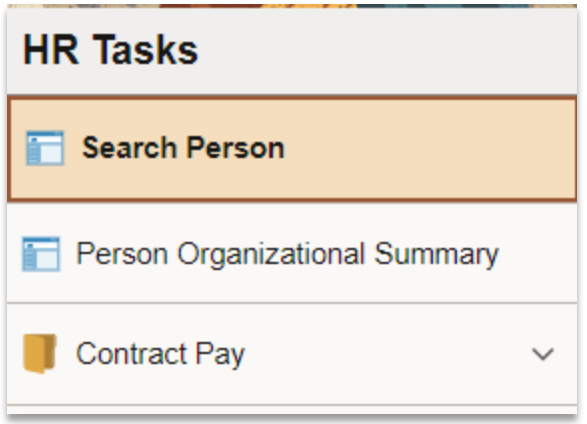
Current Label





New Label





Page Navigation:

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

Main Menu > PeopleSoft Homepage > HR Tasks > ***Search Person*** ***Note: Only available to SSC & Central Office Transactors***

DEMONSTRATION

Global Search

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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.

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WRAP-UP

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TOOLS AND RESOURCES

- Lived Name Matrix
  - SSC and Central Office Transactor Roles

Workforce Administration Homepage	Search Criteria	Search Results	Display on Page	EMPLID	Transactor	UCPath Role
Search Person	Legal	Lived, Legal	Lived, Legal		X	HR Inquiry
Person Org Summary	Lived	Lived	Lived	X	X	HR Inquiry, Dept HR Inquirer, Budget Dist/Staffing Entry
Contract Pay>Contract Payment Details	Lived	Lived	Lived	X	X	HR Inquiry, Dept HR Inquirer
Contract Pay>Update Contract Pay NA	Lived	Lived	Lived	X	X	HR Inquiry, Dept HR Inquirer
PayPath/Additional Pay>Create Additional Pay	Lived	Lived	Lived	X	X	PayPath & Additional Compensation Initiator, HR Inquiry, Dept HR Inquirer
PayPath/Additional Pay>Self Service Add'l Pay	–	–	–	X	X	PayPath & Additional Compensation Initiator
PayPath/Additional Pay>PayPath Actions	Lived	Lived	Lived	X	X	PayPath & Additional Compensation Initiator
PayPath/Additional Pay>PayPath Actions ACAD	–	–	–	X	X	PayPath & Additional Compensation Initiator
PayPath/Additional Pay>PayPath Actions STAFF	–	–	–	X	X	PayPath & Additional Compensation Initiator
Job Data Related>Job Data	Lived, Legal	Lived, Legal	Lived	X	X	HR Inquiry, Dept HR Inquirer
Job Data Related>UC Employee Review	Lived	Lived	Lived	X	X	HR Inquiry, Dept HR Inquirer
Job Data Related>Workforce Job Summary	Lived, Legal	Lived, Legal	Lived	X	X	HR Inquiry, Dept HR Inquirer, Budget Dist/Staffing Entry, Budget Snapshot
Personal Data Related>Activities	Lived	Lived	Lived	X	X	Onboarding and Offboarding Transactor
Personal Data Related>Emergency Contact	Lived	Lived	Lived	X	X	HR Inquiry, Onboarding and Offboarding Transactor
Personal Data Related>Gender Identity	Lived	Lived	Lived,Legal	X	X	HR Inquiry, Onboarding and Offboarding Transactor
Personal Data Related>Identification Data	Lived	Lived	Lived	X		Onboarding and Offboarding Transactor
Personal Data Related>Modify a Person	Lived, Legal	Lived, Legal	Lived, Legal	X	X	HR Inquiry
Personal Data Related>Person Checklist	Lived	Lived	Lived	X	X	HR Inquiry, Dept HR Inquirer
Personal Data Related>Person Profiles	Lived	Lived	Lived	X	X	HR Inquiry, Dept HR Inquirer
Personal Data Related>Security Clearance	Lived	Lived	Lived	X	X	HR Inquiry, Dept HR Inquirer
Personal Data Related>UC External System IDs	Lived	Lived	Lived	X	X	Onboarding and Offboarding Transactor, UC External System ID
Personal Data Related>UC Patent Inquiry	Lived	Lived	Lived	X	X	UC Patent Inquiry, Onboarding and Offboarding Transactor
Reports/Processes>Report Manager	–	–	–	–	X	Reports Manager
Smart HR Templates>Smart HR Transactions	Lived (List)	Lived	Lived, Legal	–	X	Onboarding and Offboarding Transactor
Smart HR Templates>SS Smart HR Transactions	Lived	Lived	Lived, Legal	X	X	Onboarding and Offboarding Transactor
Smart HR Templates>Smart HR Transaction Status	Lived	Lived	Lived	X	X	HR Inquiry, Dept HR Inquirer, Onboarding and Offboarding Transactor
Add/Update Position>Add/Update Position Info	–	–	–	–	X	Position Control Initiator, Position Admnistrator, Budget Dist/Staffing Entry, Budget Dist/Staffing Inquiry
Add/Update Position>Position Control Approval	–	–	–	–	X	Position Administrator

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

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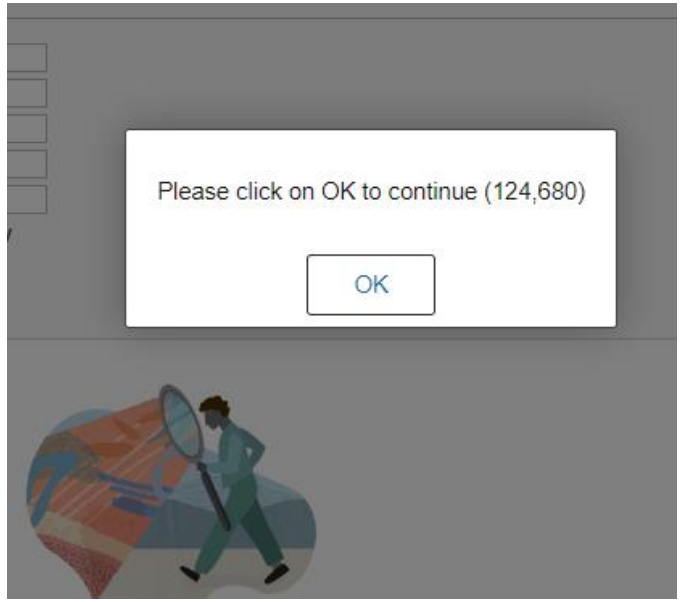
JUNE RELEASE ORACLE DEFECT

- **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



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QUESTIONS

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THANK YOU

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