LIVED NAME & UCPATH UPGRADE INQUIRY TRAINING

June 16, 2023
UCR Campus Support Center
<table>
<thead>
<tr>
<th>Topic</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome &amp; Introductions</td>
<td>5 min</td>
</tr>
<tr>
<td>UCPath Lived Name Background</td>
<td>5 min</td>
</tr>
<tr>
<td>Lived Name Search Impacts</td>
<td>5 mins</td>
</tr>
<tr>
<td>Lived Name Search Demonstration</td>
<td>15 min</td>
</tr>
<tr>
<td>UCPath Upgrade Changes</td>
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<tr>
<td>UCPath Upgrade Demonstration</td>
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<tr>
<td>Hypercare</td>
<td>5 min</td>
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<tr>
<td>Questions &amp; Wrap-Up</td>
<td>5 min</td>
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</tbody>
</table>
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
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
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

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**UCLC TRAINING**

- [Gender Recognition: A Focus on Transgender, Nonbinary, and Intersex Awareness](#) (pre-requisite – 35 min)
- [UC Policy on Gender Recognition and Lived Name](#) (35 min)
- [UC Presidential Policy on Gender Recognition and Lived Name](#) (18 slides)

**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.

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**WHEN?**

- **June 16, 2023**
  - *Prior to the UCPath Upgrade and Lived Name Go-Live*
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
JOB DATA RELATED > JOB DATA
(Specific to accountability structure & Legal and (Lived) Name search)
JOB DATA RELATED > WORKFORCE JOB SUMMARY
(Specific to accountability structure & Legal and (Lived) Name search)

Current State

Future State
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
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

UCPATH ANNUAL UPGRADES BACKGROUND

What is PUM44?

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
**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**
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
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
GLOBAL SEARCH – REFINE SEARCH CRITERIA
(Specific to accountability structure & (Lived) Name search)

**Expanded Search** displays if search results do not find any results
LABEL CHANGES – NAVIGATION COLLECTION

Current Label

- Smart HR Templates
  - Smart HR Transactions
  - SS Smart HR Transactions
  - Transaction Status

New Label

- Smart HR Templates
  - Smart HR Transactions
  - SS Smart HR Transactions
  - Smart HR Transaction Status

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](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

<table>
<thead>
<tr>
<th>Workforce Administration Homepage</th>
<th>Search Criteria</th>
<th>Search Results</th>
<th>Display on Page</th>
<th>EMPLID</th>
<th>Inquirer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Org Summary</td>
<td>Lived</td>
<td>Lived</td>
<td>Lived</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Contract Pay &gt; Contract Payment Details</td>
<td>Lived</td>
<td>Lived</td>
<td>Lived</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Contract Pay &gt; Update Contract Pay NA</td>
<td>Lived</td>
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<td>Lived</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Job Data Related &gt; Job Data</td>
<td>Lived, Legal</td>
<td>Lived, Legal</td>
<td>Lived</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Job Data Related &gt; UC Employee Review</td>
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<td>Lived</td>
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<td>Lived, Legal</td>
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<tr>
<td>Personal Data Related &gt; Person Checklist</td>
<td>Lived</td>
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<td>Lived</td>
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<tr>
<td>Personal Data Related &gt; Person Profiles</td>
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<td>Personal Data Related &gt; Security Clearance</td>
<td>Lived</td>
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<td>Lived</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Smart HR Templates &gt; Smart HR Transaction Status</td>
<td>Lived</td>
<td>Lived</td>
<td>Lived</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Extended Absence &gt; Absence Event</td>
<td>Lived</td>
<td>Lived</td>
<td>Lived</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Extended Absence &gt; Extended Absence Trans History</td>
<td>Lived</td>
<td>Lived</td>
<td>Lived</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Manage Accruals/Balances &gt; Admin - Review Absence Balance</td>
<td>Lived</td>
<td>Lived</td>
<td>Lived</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Manage Accruals/Balances &gt; Career &amp; Benefits Elig Hrs INC</td>
<td>Lived</td>
<td>Lived</td>
<td>Lived</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Manage Accruals/Balances &gt; Manage Accruals</td>
<td>–</td>
<td>Lived</td>
<td>Lived</td>
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<tr>
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<td>Lived</td>
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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
QUESTIONS
THANK YOU