

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)

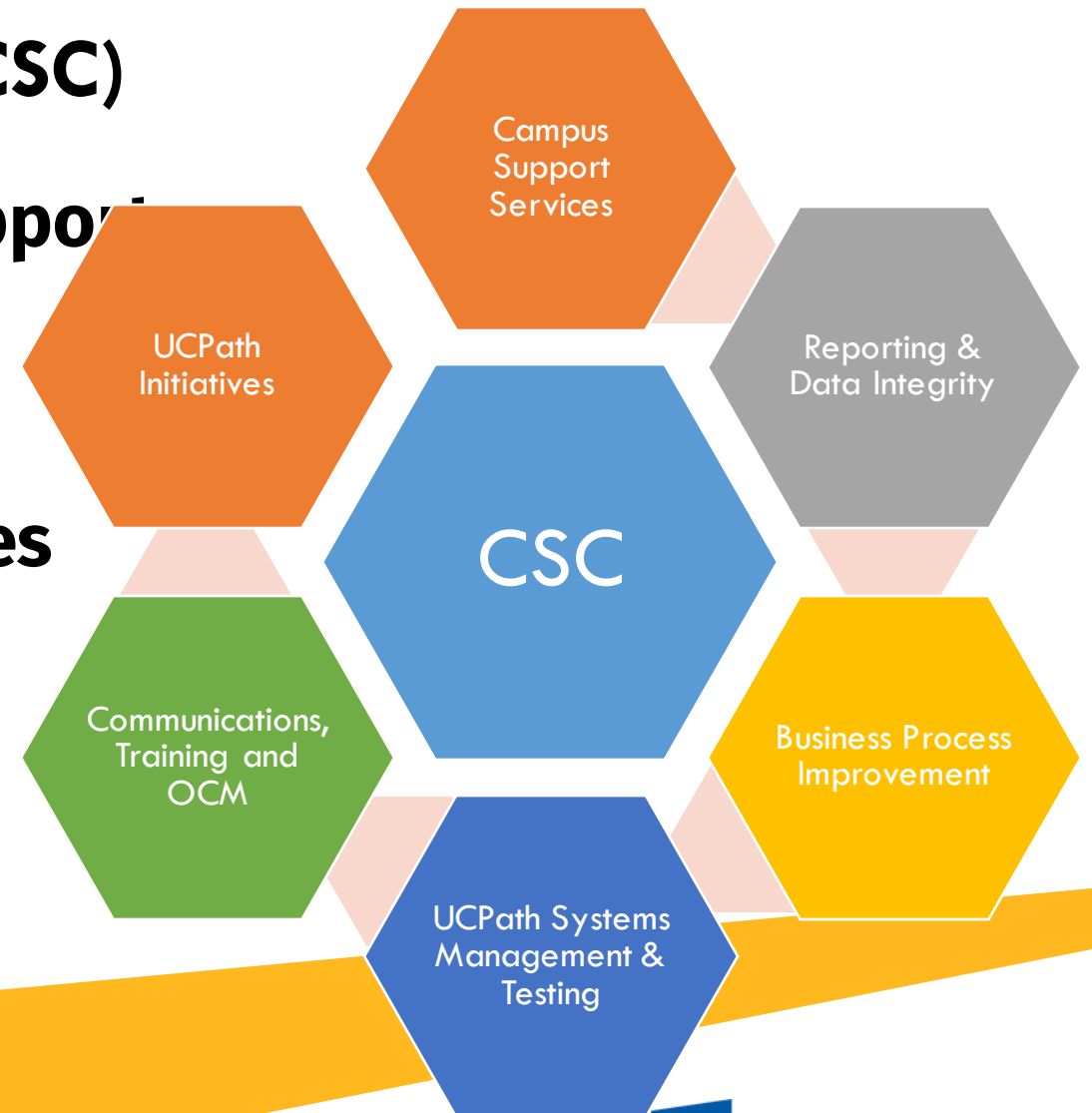
Hypercare (5 min)

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

- [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.

WHEN?

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

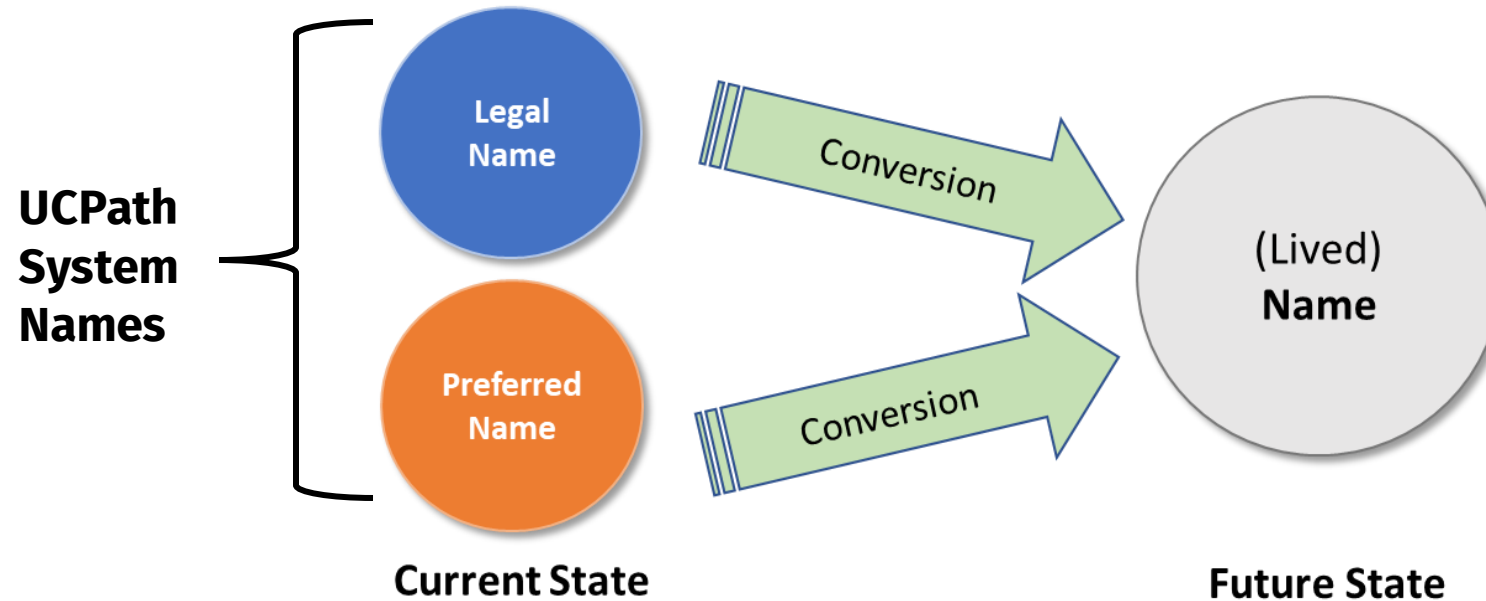


UCPATH LIVED NAME

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 Choose from 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

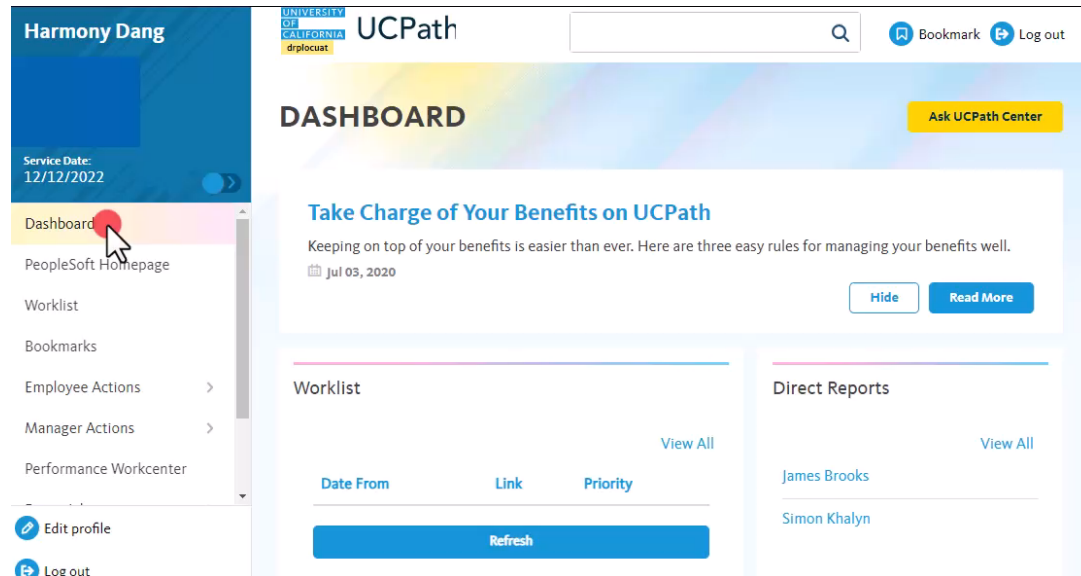
Lived Name Search

EMPLID_s 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?

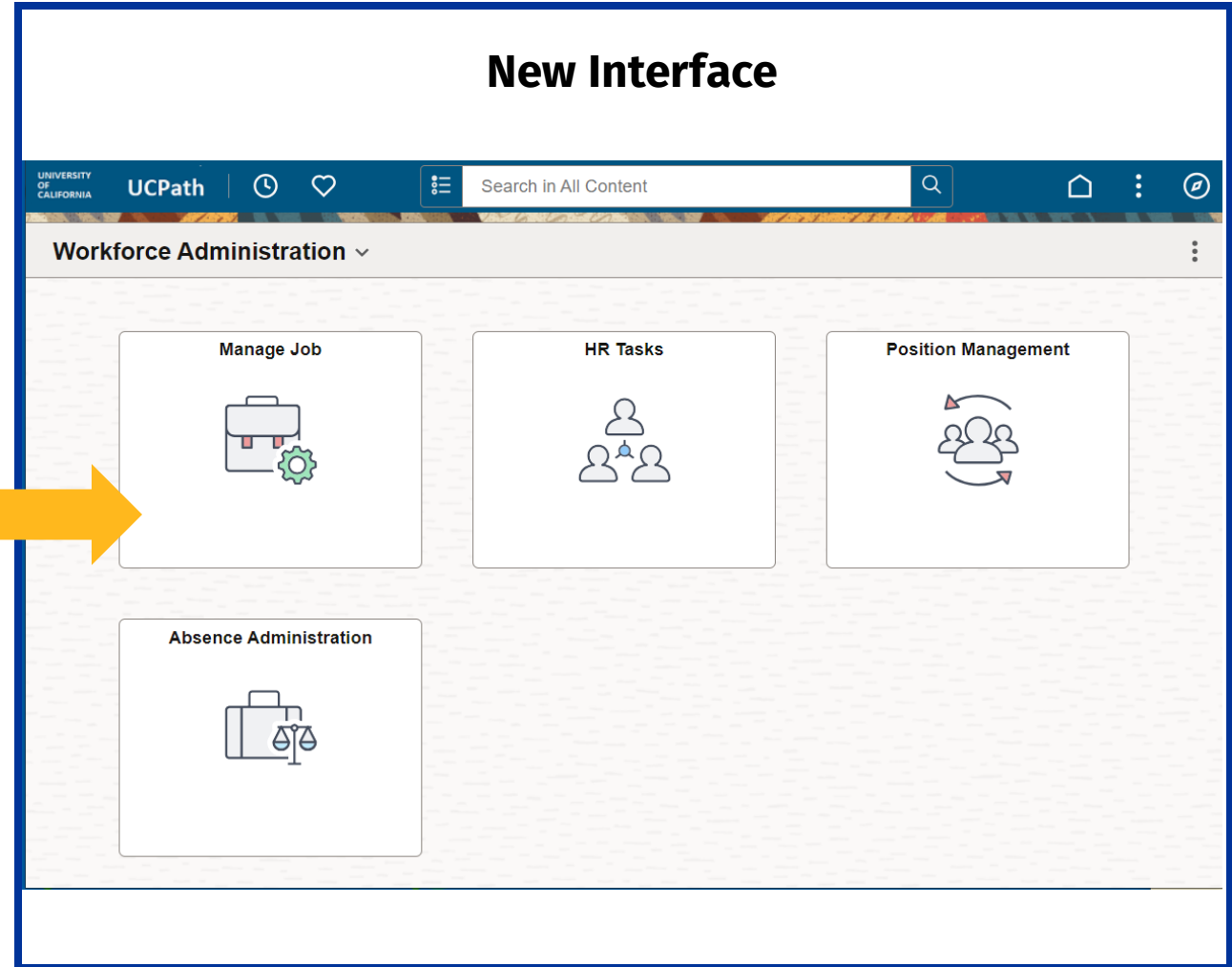
- June 20, 2023

INTERFACE CHANGES

Current Interface



New Interface



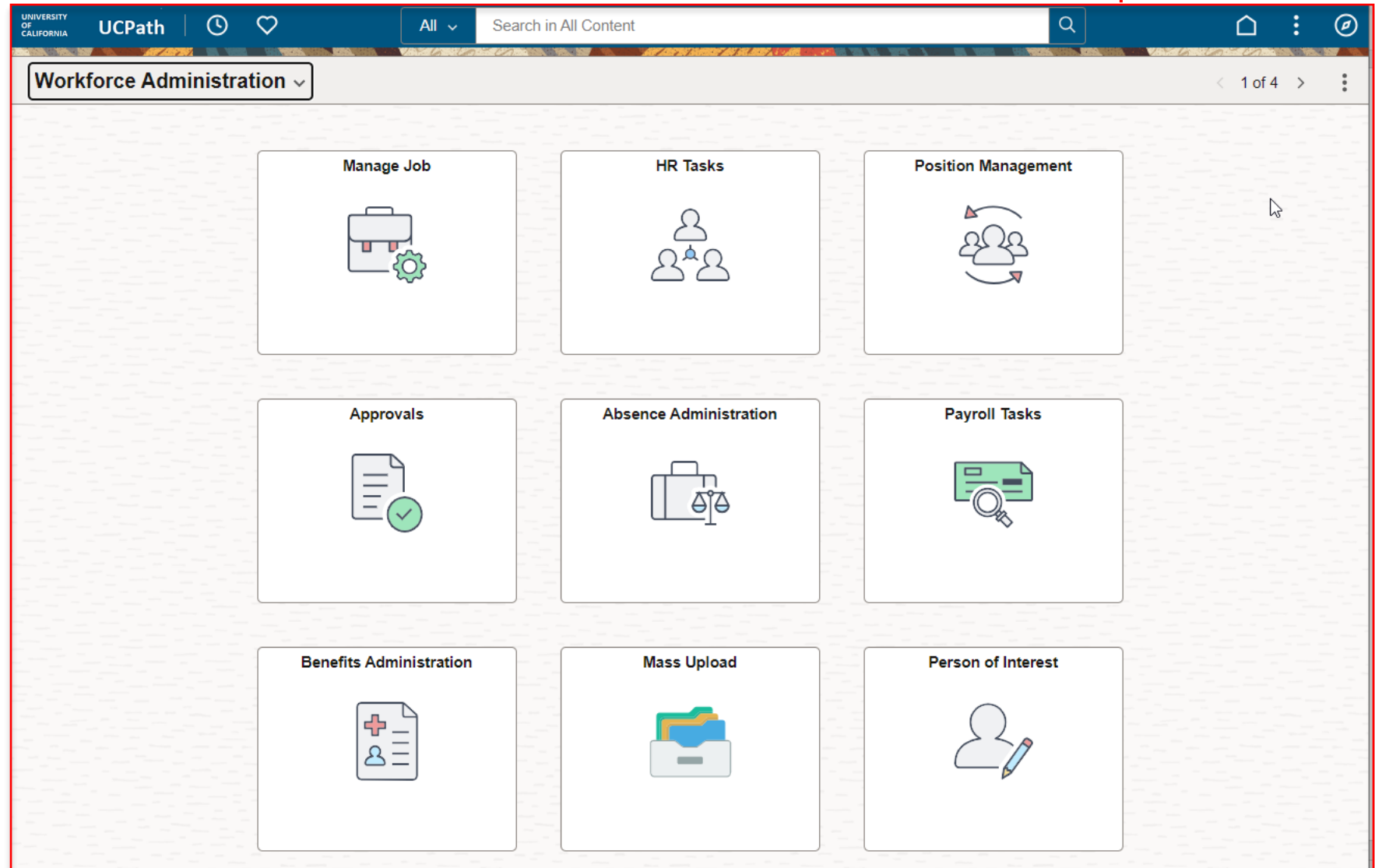
HOMEPAGE UPDATES

PUM44 Upgrade updated for accessibility (icons & color theme)

- Homepages
- Tiles
- Navigation Collections

Navigation will not change

New Color Theme



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



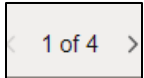
Back button found on navigation collection pages

The screenshot displays the UCPath Workforce Administration homepage. At the top, a new 'Quick Access Bar' is highlighted in red, containing the University of California logo, 'UCPath', a clock icon, a heart icon, a dropdown menu set to 'All', a search bar with 'Search in All Content', a search icon, a home icon, a three-dot menu icon, and a refresh icon. Below this bar is a breadcrumb trail for 'Workforce Administration' and a page indicator '1 of 4'. The main content area features a grid of nine navigation 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' (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 and pencil).

HOMEPAGE UPDATES

New Homepage Selector

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



Optional Homepage scrolling

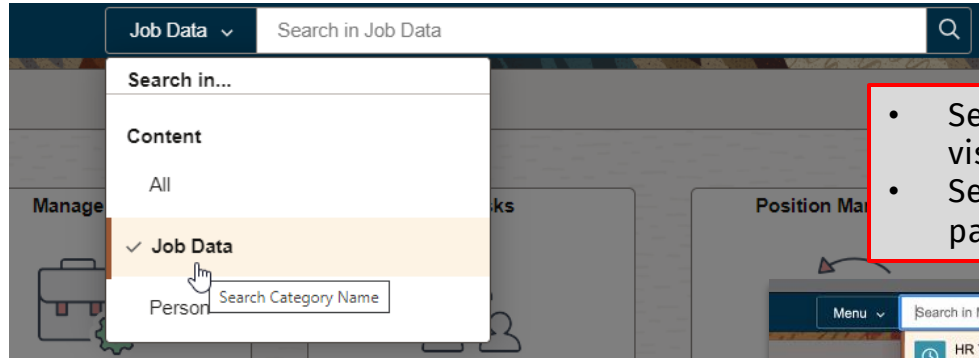


Refresh

The screenshot displays the UCPath homepage interface. At the top, the header includes the University of California logo, the text 'UCPath', a clock icon, a heart icon, a search bar with 'All' and 'Search in All Content', and navigation icons for home, menu, and profile. Below the header, 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' pagination indicator in the top right corner. The main content area features a grid of administrative tiles: 'Manage Job' (with a briefcase and gear icon), 'HR Tasks' (with a group of people icon), 'Position Management' (with a group of people and circular arrows icon), 'Approvals' (with a document and checkmark icon), 'Absence Administration' (with a briefcase and scales icon), 'Payroll Tasks' (with a document and magnifying glass icon), 'Benefits Administration' (with a document, plus sign, and person icon), 'Mass Upload' (with a folder icon), and 'Person of Interest' (with a person and pencil icon). A 'Refresh' icon (three vertical dots) is located in the top right corner of the main content area.

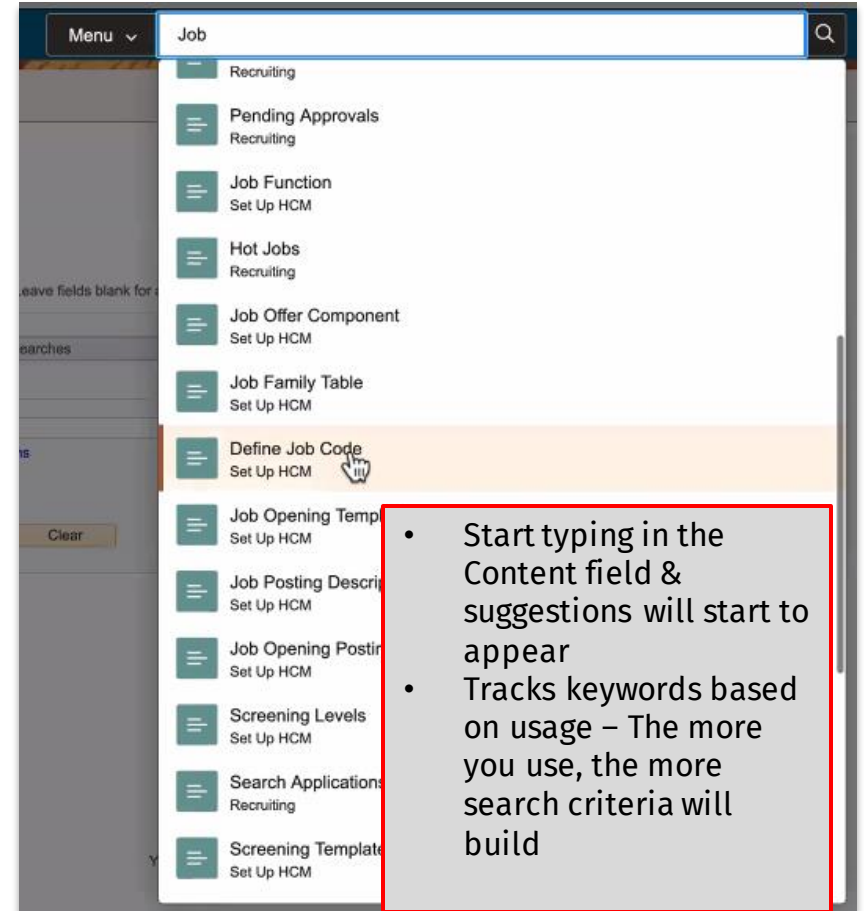
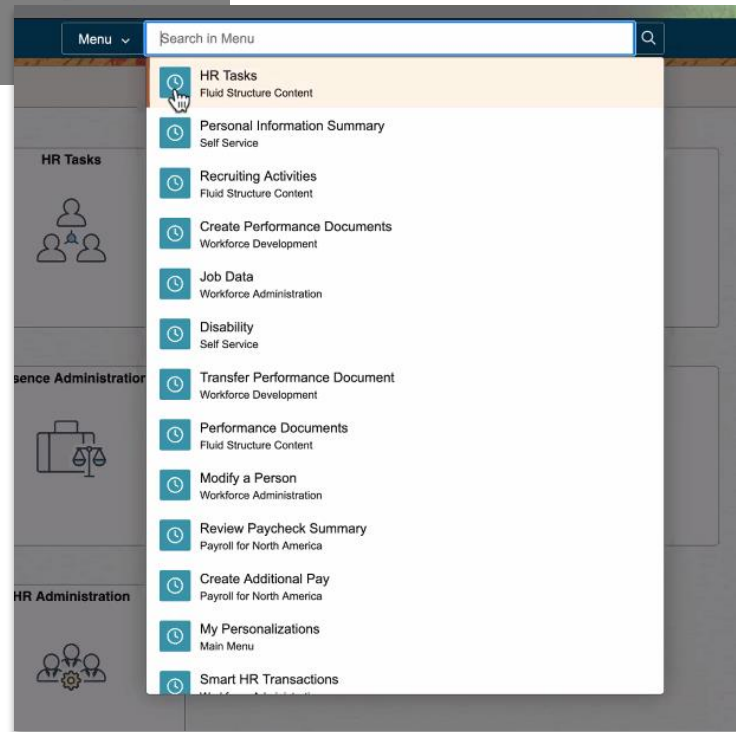
GLOBAL SEARCH – POWERFUL SEARCH ENGINE

(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

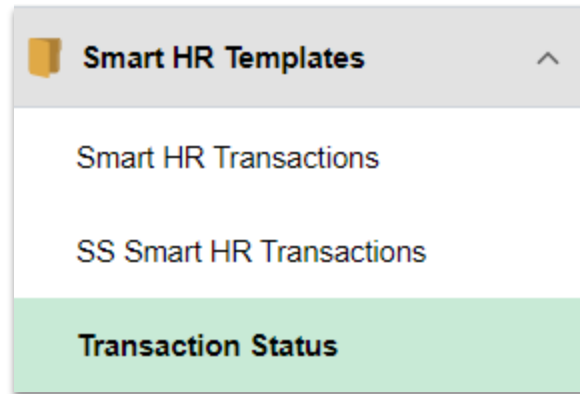
(Specific to accountability structure & (Lived) Name search)

Expanded Search displays if search results do not find any results

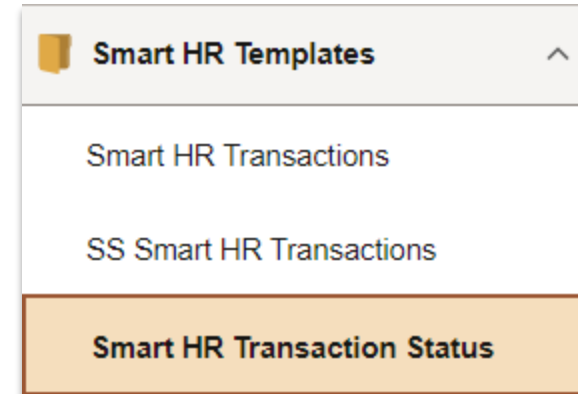
The screenshot shows a search interface with a dark blue header containing navigation icons and a search bar labeled "Search in All Content". Below the header is a "Search Results" section. On the left, there is a "New Search" panel with several input fields: "Category" (with a dropdown menu showing "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 box with an exclamation mark icon and the text: "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

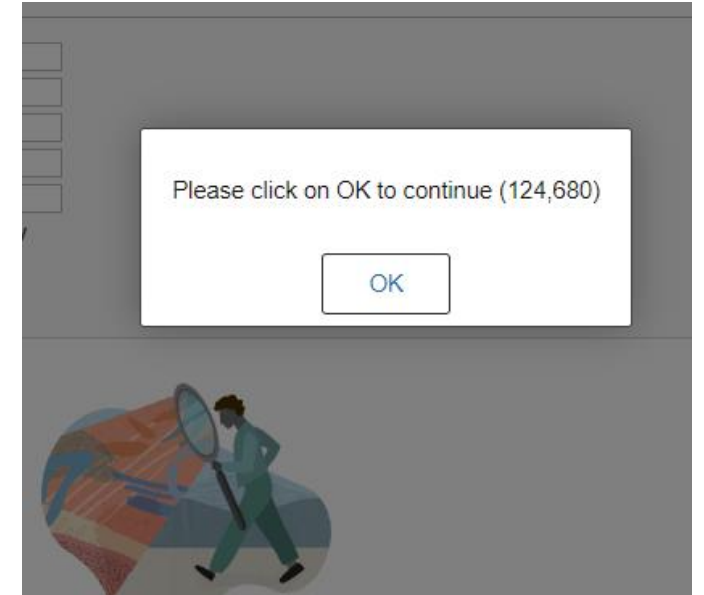
- Lived Name Matrix
 - Dept HR Inquirer / Absence Management Inquiry Roles

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