

LIVED NAME & UCPATH UPGRADE TRANSACTOR 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:

- **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

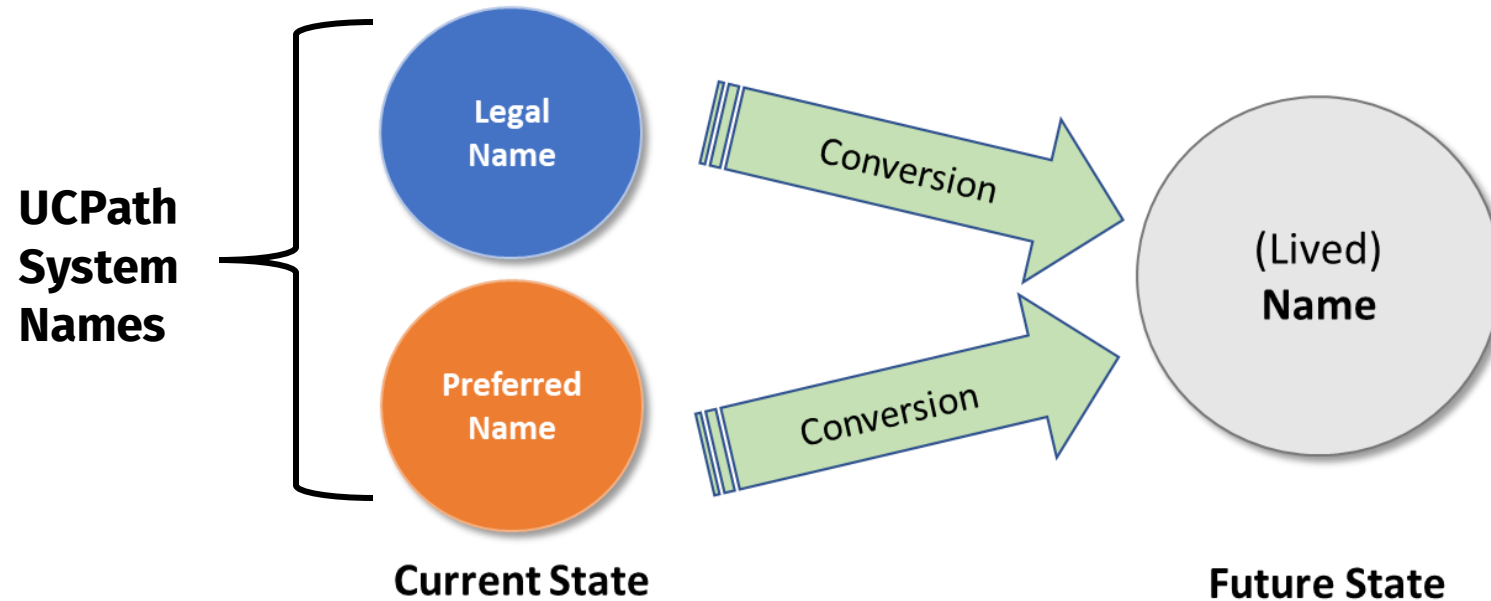


UCPATH LIVED NAME

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'

SEARCH PERSON

(System-wide search access & Legal Name search)

Current State

Future State

Search Criteria

Search Type Person Ad Hoc Search

Search Parameter PERSON_SEARCH Person Search

Search Result Rule ?

Search Result Code Search Clear All Carry ID reset

User Default

Search Criteria ?

Search Fields	Value
National Id	<input type="text"/>
First Name Search	<input type="text"/>
Last Name Search	<input type="text"/>
Date of Birth	<input type="text"/>

Search by Order Number ?

Search Order	Description	Selective Search
10	NID Only	<input type="button" value="Selective Search"/>
20	Name, Bday & NID	<input type="button" value="Selective Search"/>
30	First Name and DOB	<input type="button" value="Selective Search"/>



Search Criteria

Search Type Person Ad Hoc Search

Search Parameter PERSON_SEARCH Person Search

Search Result Rule ?

Search Result Code Search Clear All Carry ID reset

User Default

Search Criteria ?

National Id	<input type="text"/>
Legal First Name Search	<input type="text"/>
Legal Last Name Search	<input type="text"/>
Date of Birth	<input type="text"/>

Search by Order Number ?

10	NID Only	<input type="button" value="Selective Search"/>
20	Legal Name, DOB and NID	<input type="button" value="Selective Search"/>
30	Legal First Name and DOB	<input type="button" value="Selective Search"/>

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

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

Future State

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**

PERSONAL DATA RELATED > MODIFY A PERSON

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

Current State

Future State

Personal Information

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 ▼

Alternate Character Name begins with ▼

Middle Name begins with ▼

Include History Case Sensitive



Personal Information

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 ▼

Name begins with ▼

Legal First Name begins with ▼

Legal Middle Name begins with ▼

Legal Last Name begins with ▼

Case Sensitive Include History

NEW FIELDS ON FAMILIAR PAGES

Template: UC_FULL_HIRE Name:
Effective Date: 06/15/2023 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
Employee ID: NEW Employee Record:

Personal Data | Job Data | Earns Dist | Employee Experience

Employee Information

Primary Name - English

*First Name Middle Name
*Last Name Name Suffix

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

Template: UC_FULL_HIRE Name:
Effective Date: 06/15/2023 Action/Action Reason: HIR/HIR (Hire - No Prior UC Affiliation)
Employee ID: NEW Employee Record:

Personal Data | Job Data | Earns Dist | Employee Experience

Employee Information

Name - Legal Name/Name


*Legal First Name Legal Middle Name
*Legal Last Name Legal Suffix 
First Name Middle Name
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.

Template:	UC_CONC_HIRE_AC	Name:	Aspen Perez
Effective Date:	06/15/2023	Action/Action Reason:	HIR/CN1 (Academic Concurrent Hire)
Employee ID:	10640142	Employee Record:	

Personal Data	Job Data	Earns Dist
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Employee Information	
Name - Legal Name/Name	
*Legal First Name <input type="text" value="Aspen"/>	Legal Middle Name <input type="text" value="James"/>
*Legal Last Name <input type="text" value="Perez"/>	Legal Suffix <input type="text" value=""/> 
First Name <input type="text" value="Appie"/>	Middle Name <input type="text" value=""/>
Last Name <input type="text" value="Anderson"/>	



DEMONSTRATION

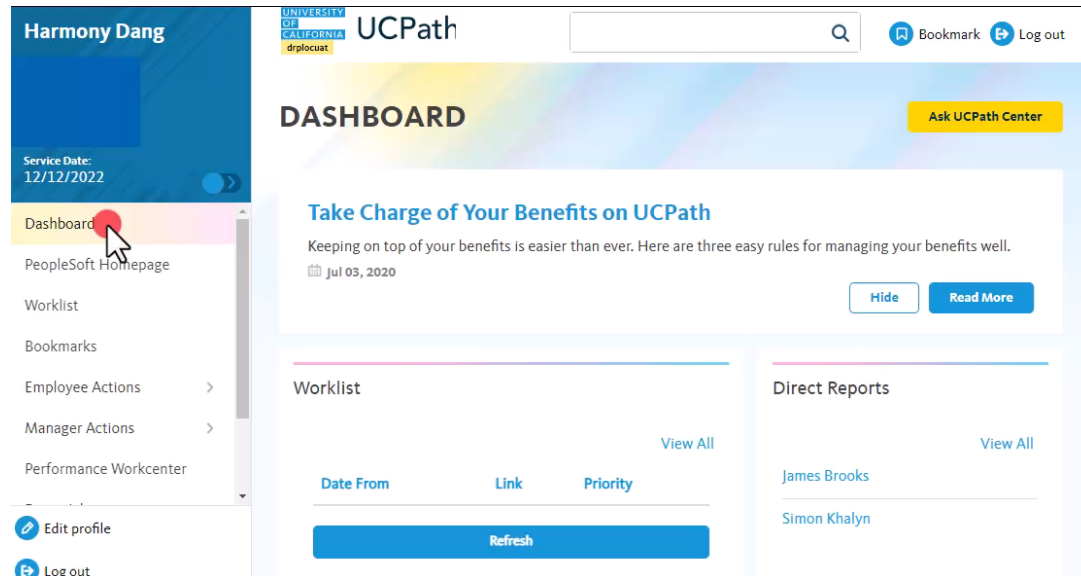
Lived Name Search

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?

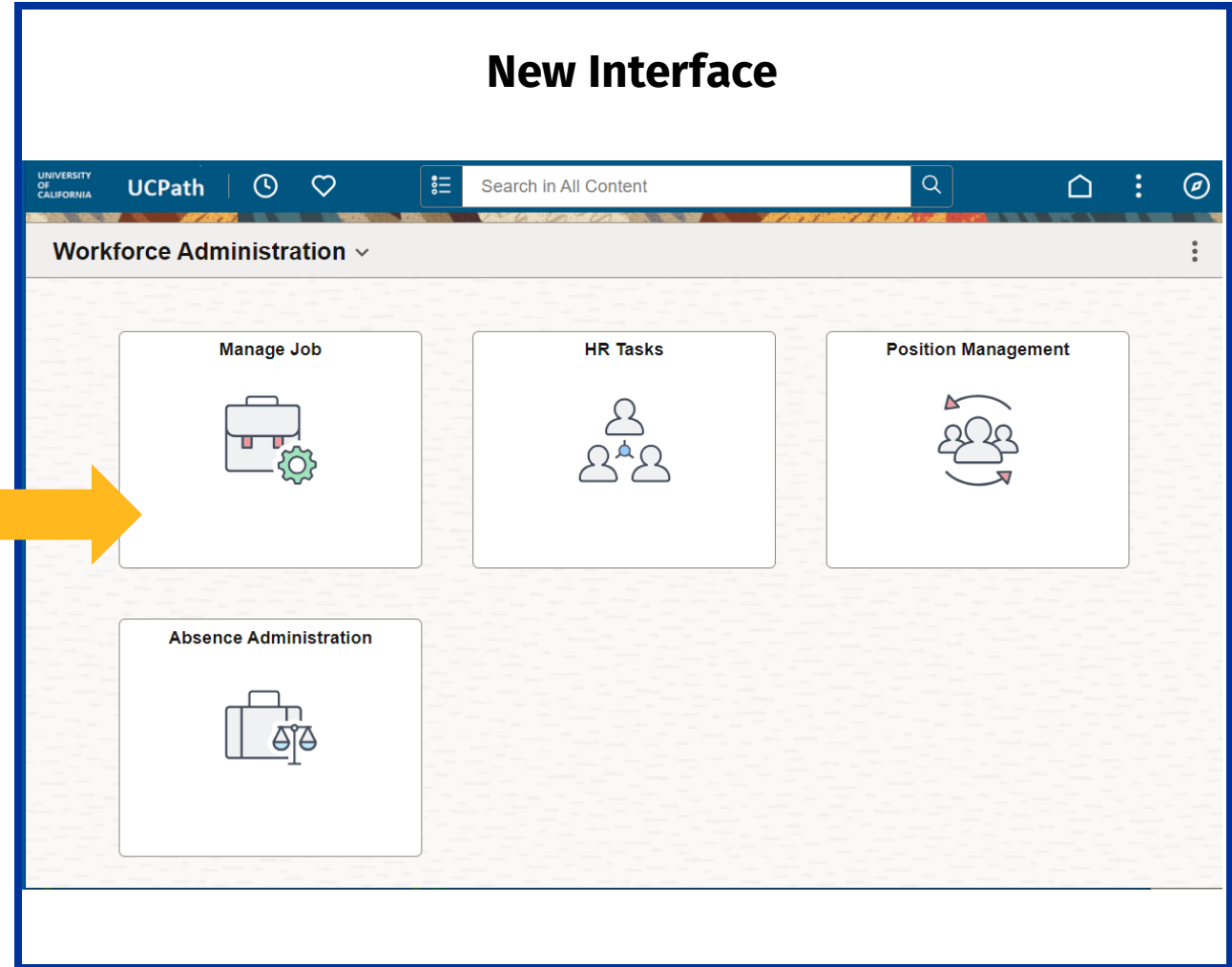
- June 20, 2023

INTERFACE CHANGES

Current Interface



New Interface



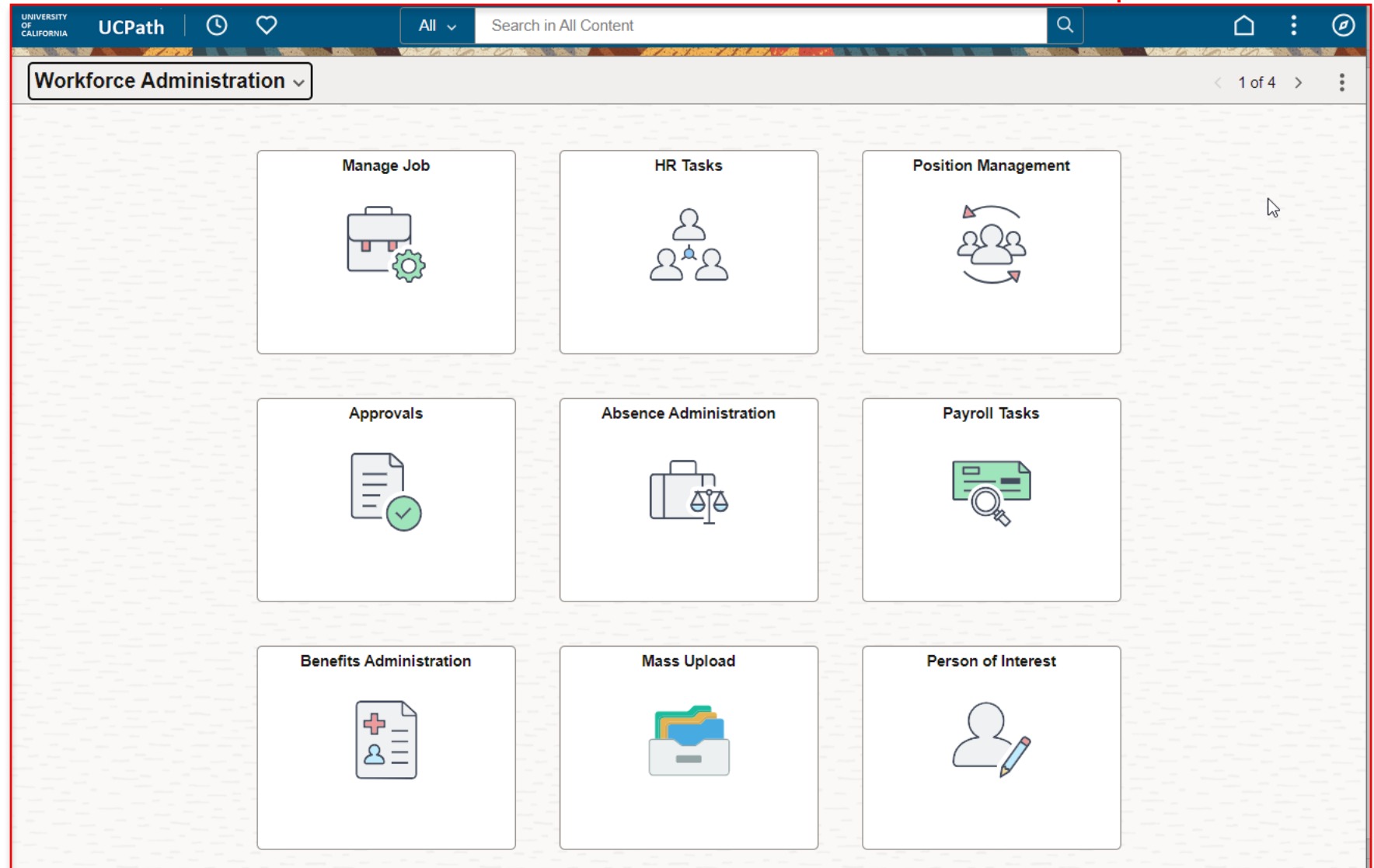
HOMEPAGE UPDATES

New Color Theme

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

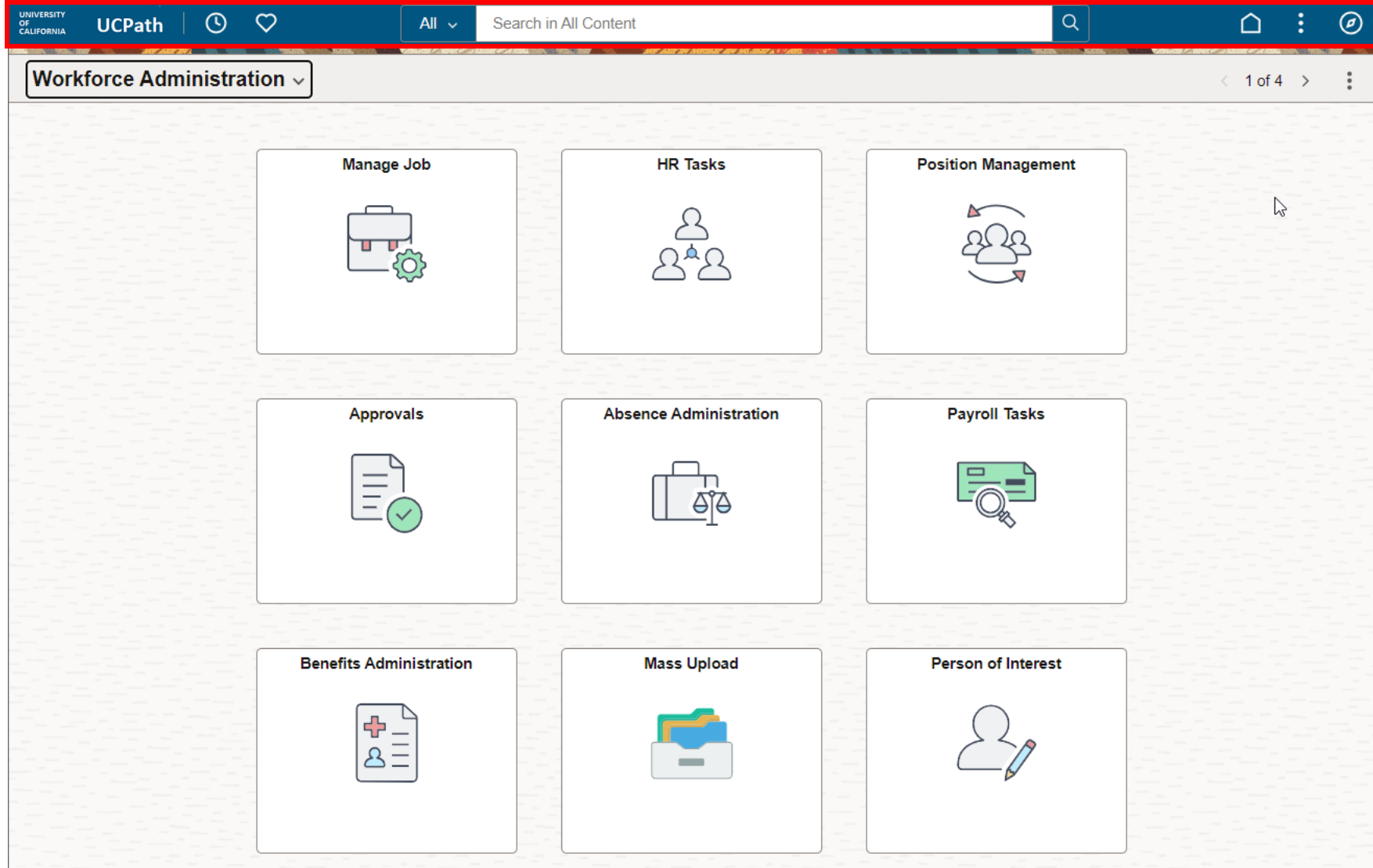
 Access Favorites

 Home

 Actions menu:
Add Favorites,
New Window, Help

 Navigator: Recently Visited, Edit Favorites, Navigation Menu

 Back button found on navigation collection pages

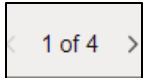


The screenshot shows the UCPath Workforce Administration homepage. At the top, a new 'Quick Access Bar' is highlighted with a red box. This bar contains the University of California logo, the 'UCPath' brand name, a clock icon, a heart icon, a dropdown menu set to 'All', a search bar with the text 'Search in All Content', a search icon, a home icon, a vertical ellipsis menu icon, and a refresh icon. Below the quick access 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 around 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).

HOMEPAGE UPDATES

New Homepage Selector

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



Optional Homepage scrolling

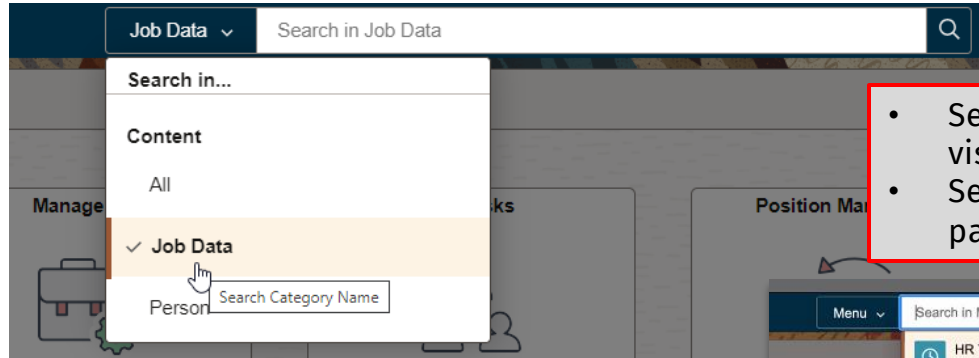


Refresh

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' 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' (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 'Refresh' icon (three vertical dots) is located in the top right corner of the main content area.

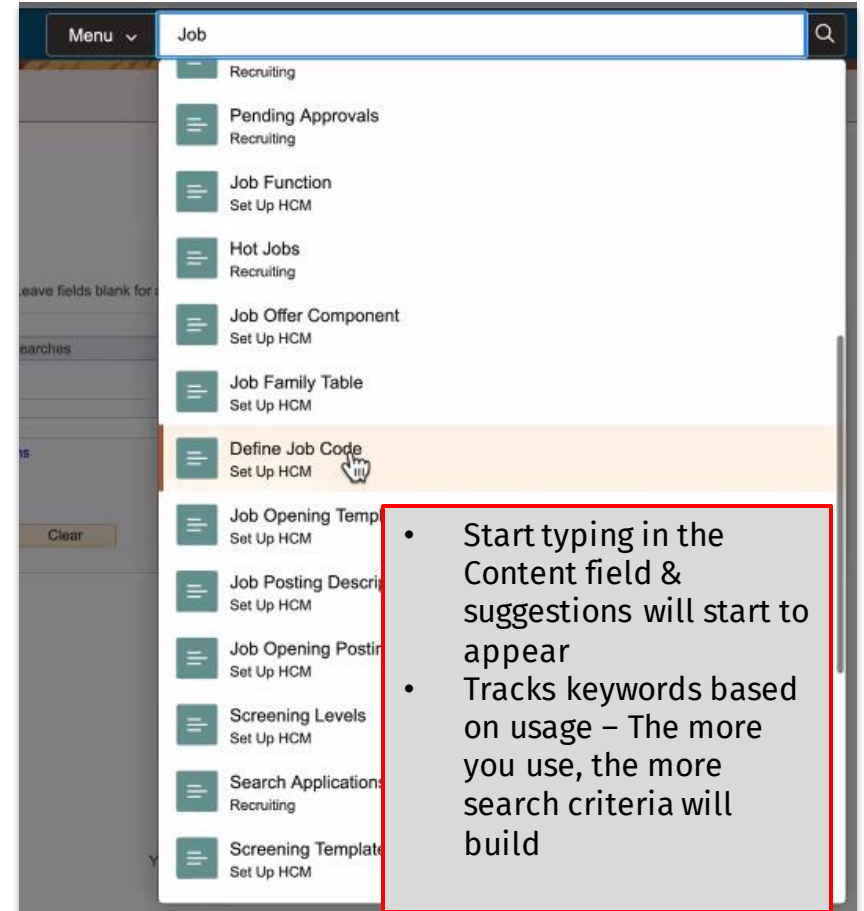
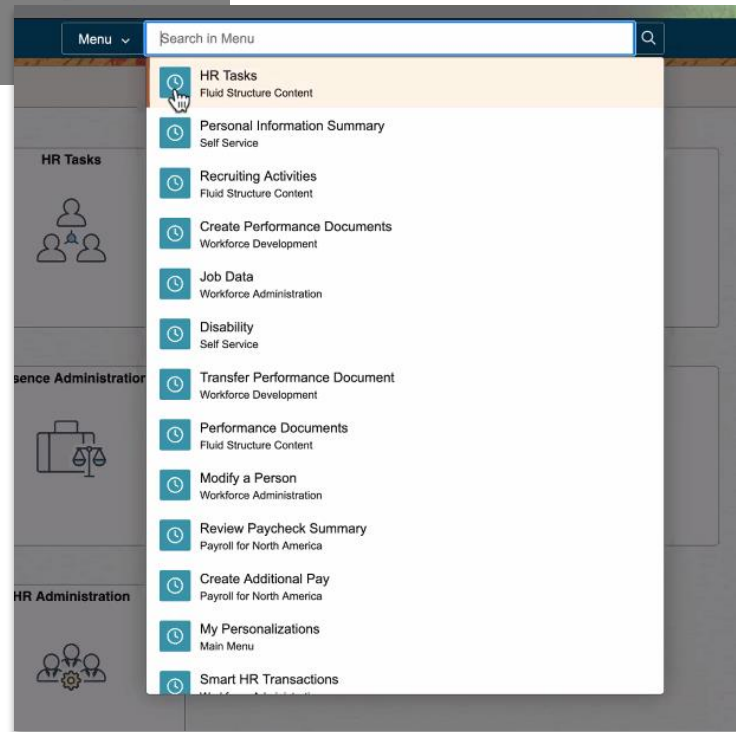
GLOBAL SEARCH – POWERFUL SEARCH ENGINE

(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

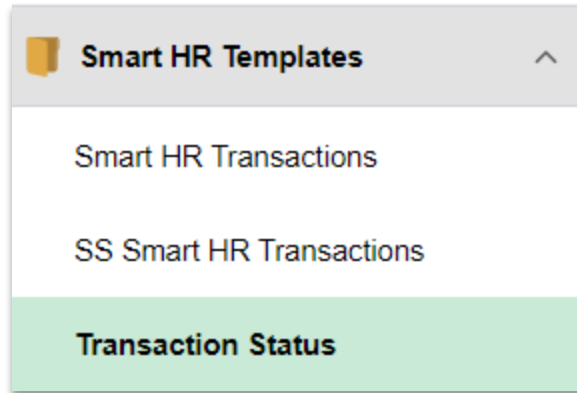
(Specific to accountability structure & (Lived) Name search)

Expanded Search displays if search results do not find any results

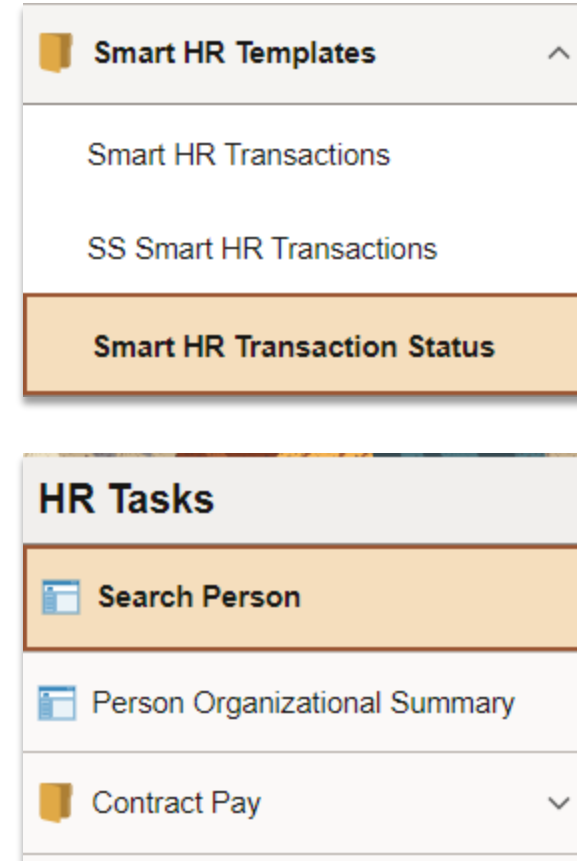
The screenshot shows a search interface with a top navigation bar containing a search box labeled "Search in All Content". Below the navigation bar is a "Search Results" section. On the left, there is a "New Search" panel with several input fields: "Category" (with a dropdown menu showing "Person", "All", 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**

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



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

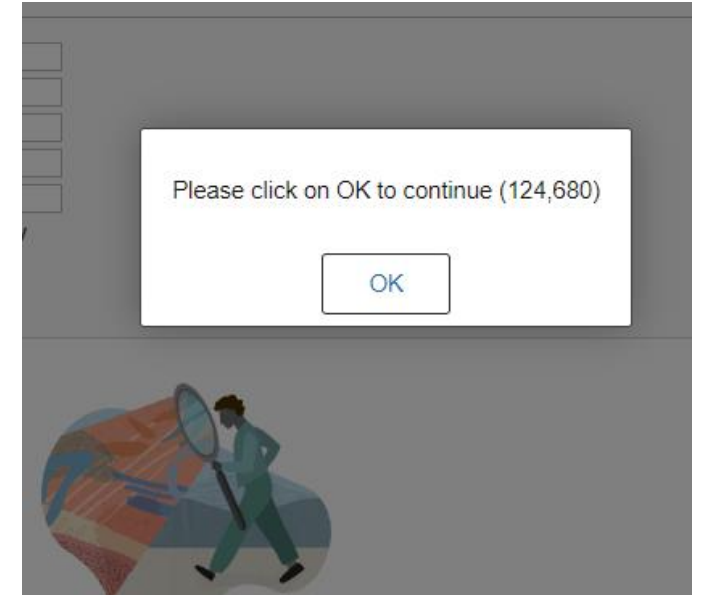
- Lived Name Matrix
 - SSC and Central Office Transactor Roles

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 Administrator, 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.

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