

UCPath Projects: June Release

Topic Based Zoom

05/31/23





Today's Topics

- Annual UCPATH Upgrade
- Manage Job Tile
- Lived Name
- Preparing for the Changes
- Q&A

Annual UCPath Upgrade

What is the purpose?

- Deploy the latest PeopleSoft HCM software (PUM 44 & Tools 8.6) to UCPath system
- UCPath is currently on PUM 37 and Tools 8.58

Who will this impact?

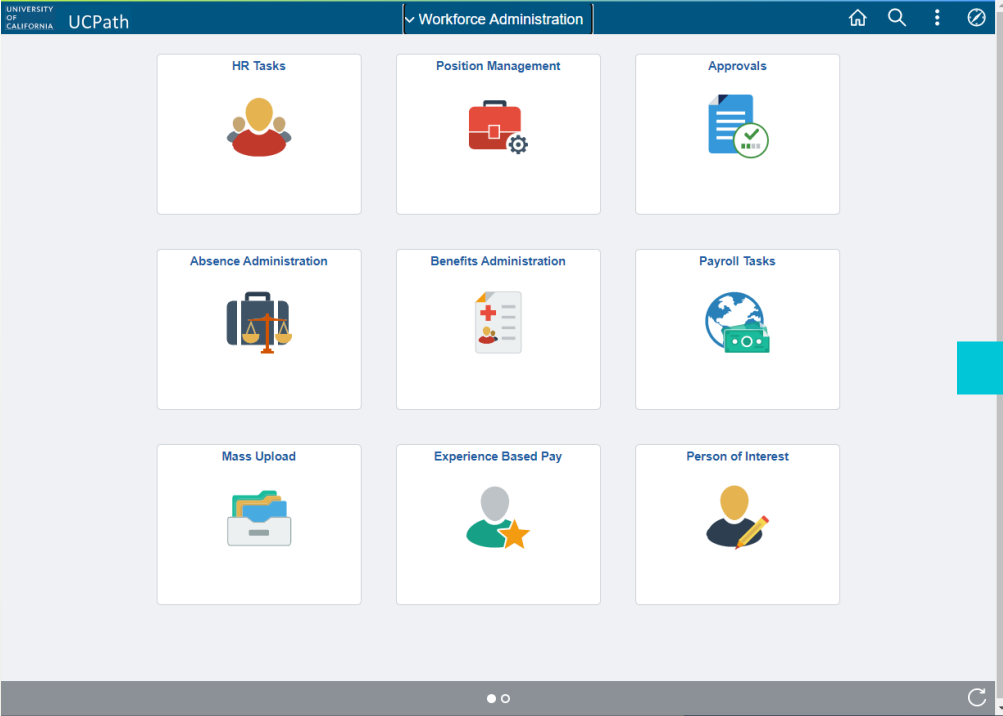
- All transactors

What's coming?

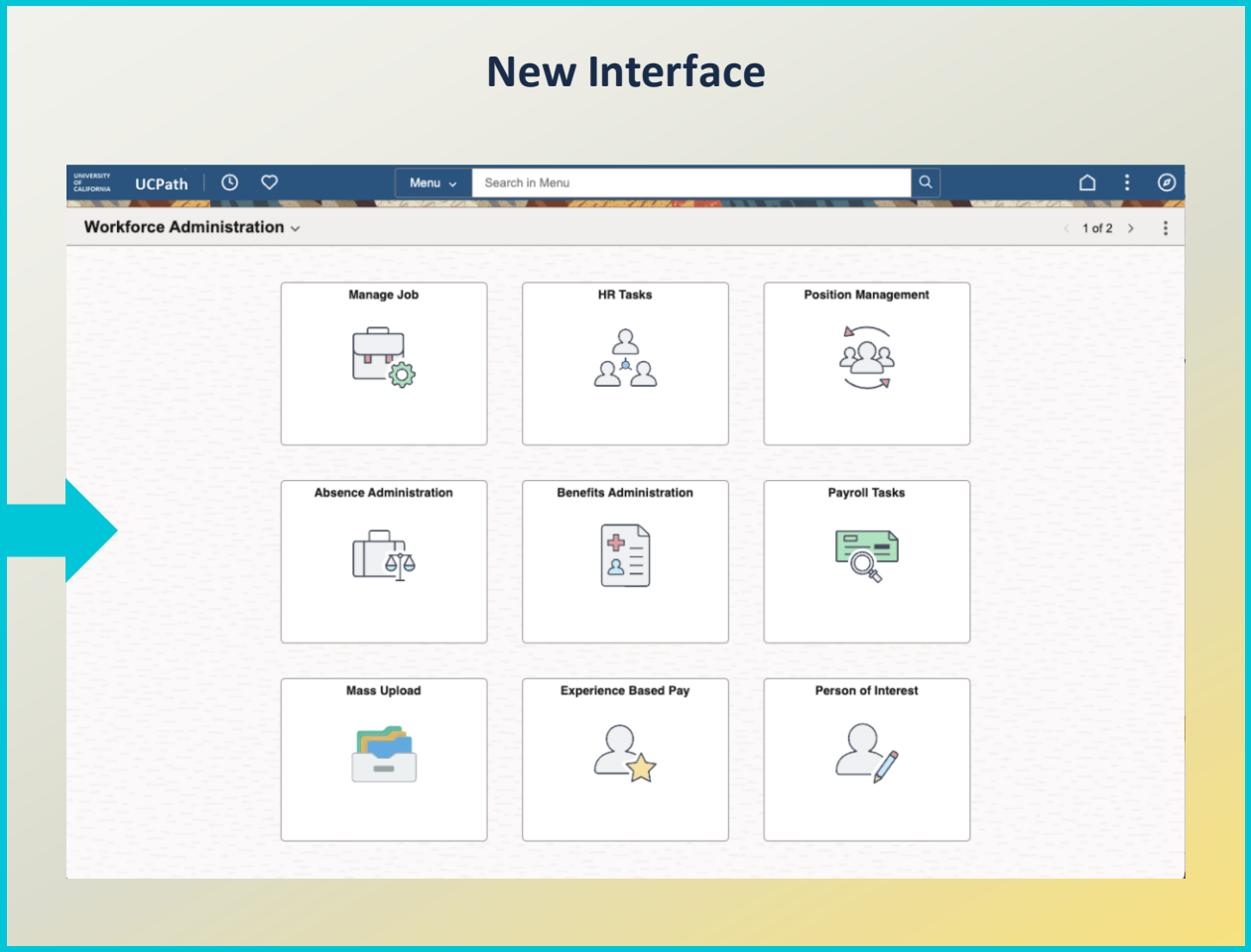
- New PeopleSoft interface color scheme
- New Quick Access Bar
- New search functionality
- NavBar breadcrumbs
- Label changes

Annual UCPath Upgrade – Interface Changes

Current Interface



New Interface



Annual UCPATH Upgrade – Quick Access Bar



New

A red rectangular box highlights two items in the Quick Access Bar: 'Recently Visited Pages' (represented by a clock icon) and 'Favorites' (represented by a heart icon).



Home



Actions Menu

Add to Favorites, New Window, Help

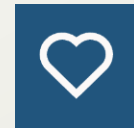
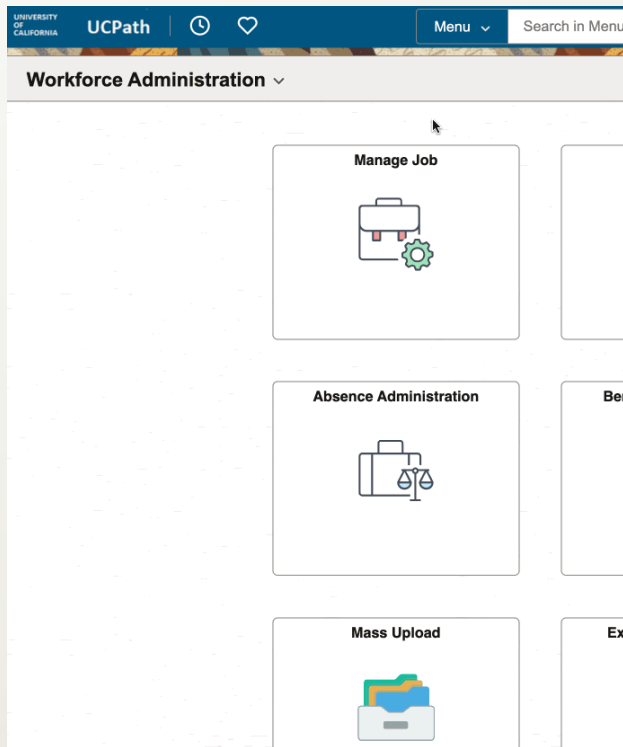


NavBar

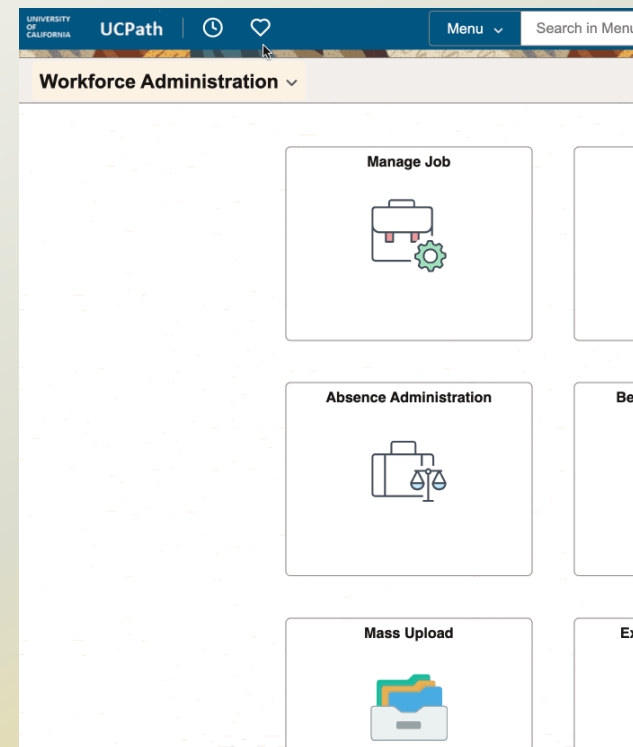
Annual UCPATH Upgrade – Recently Visited & Favorites



Clicking on the **Recently Visited** icon will show pages you have previously visited on the left side of your browser.

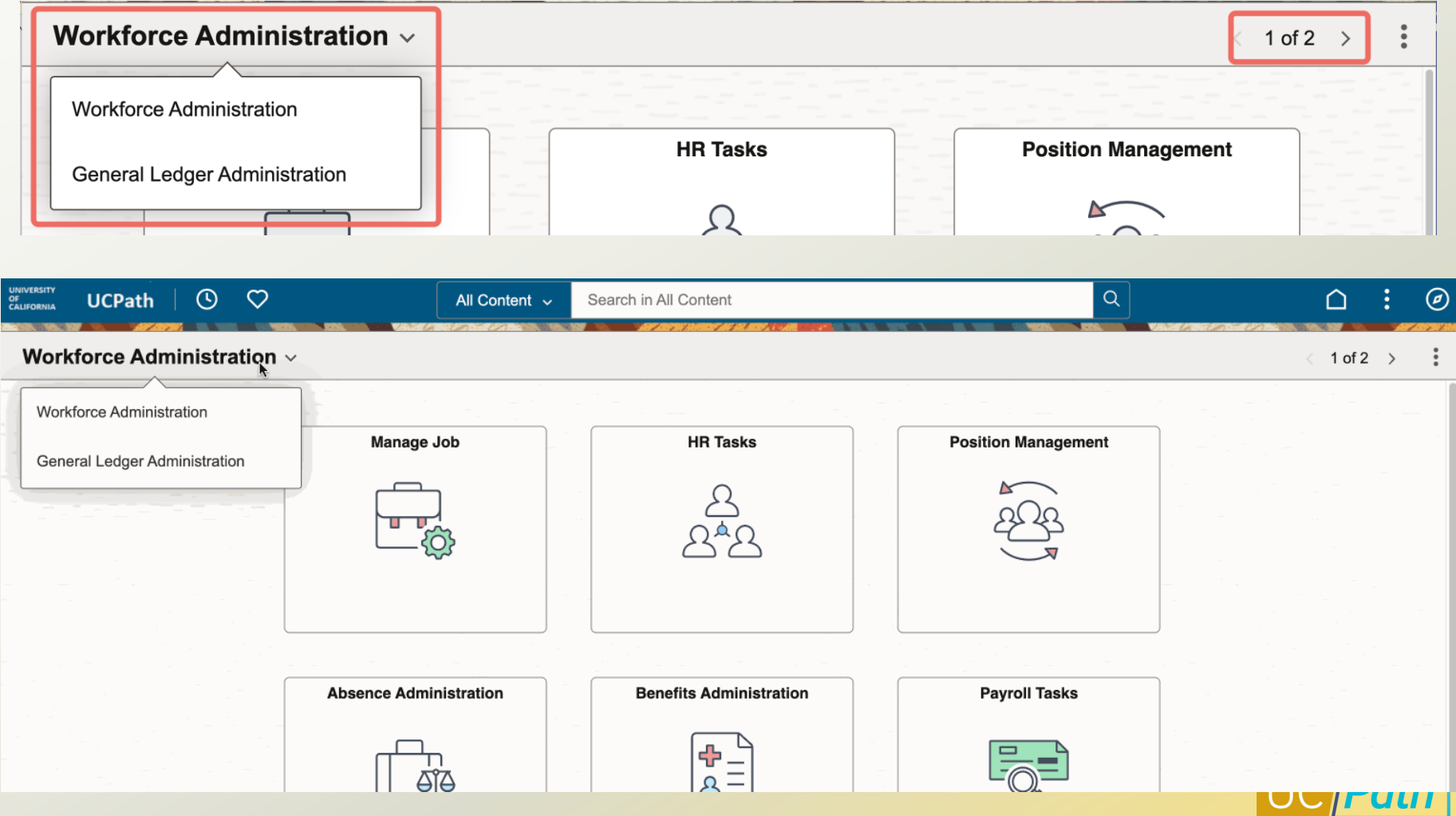


Clicking on the **Favorites** icon will show pages you have marked as a Favorite on the left side of your browser.



Annual UCPath Upgrade – Homepage Selector

Toggle between PeopleSoft Homepages using the **Homepage Selectors**.



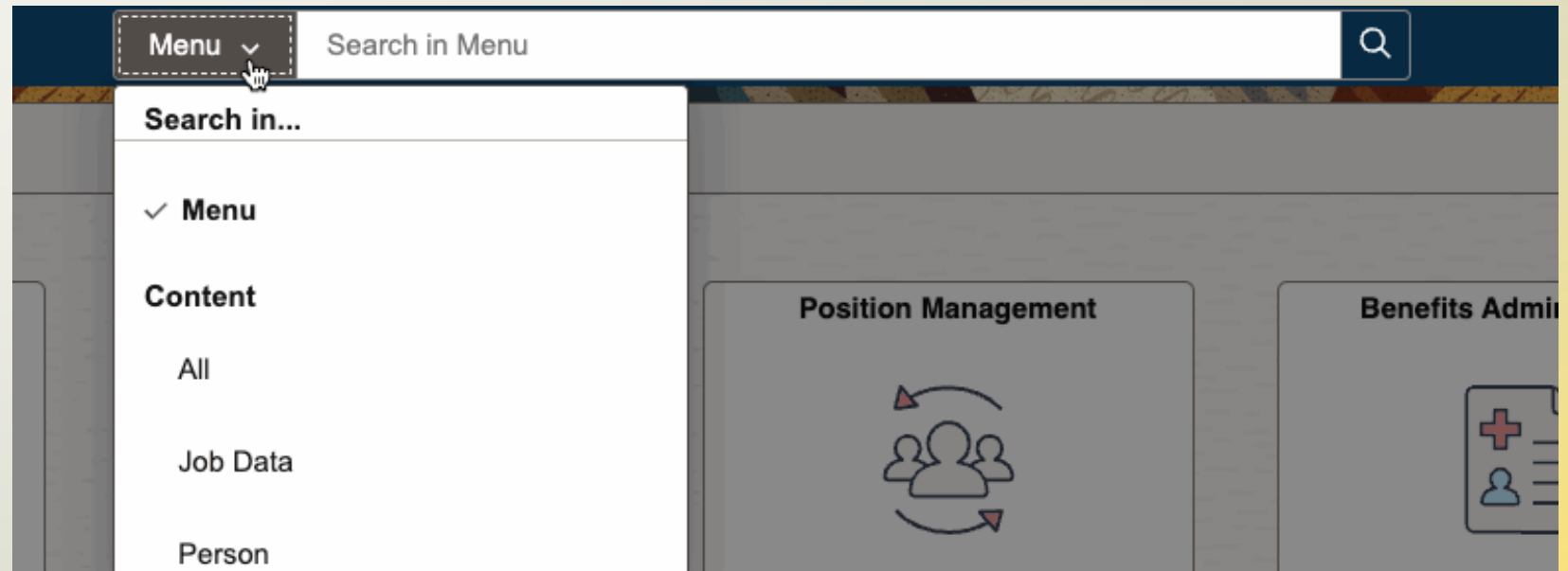
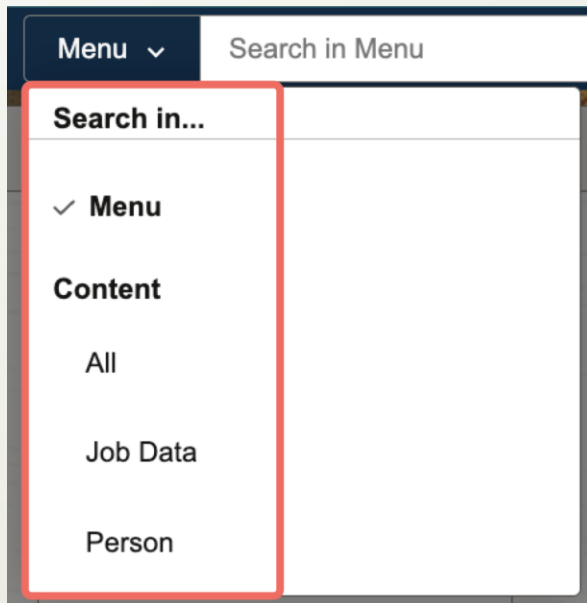
Annual UCPath Upgrade – Increased Search Functionality

Menu Search: for UCPath pages

- Displays UCPath pages you recently visited or navigated to
- Searches and returns PeopleSoft pages

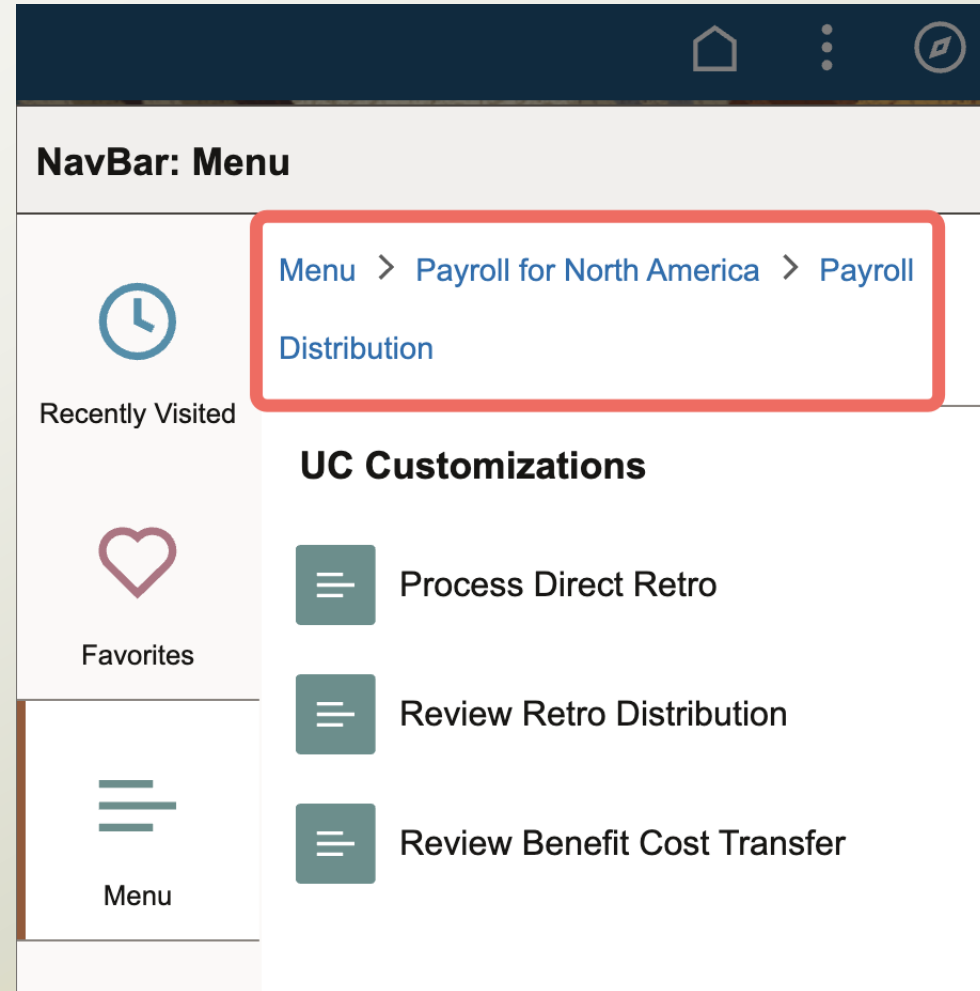
Content Search: for UCPath employees

- **All (Global) Filter:** Returns results from Modify a Person & Job Data
- **Job Data Filter:** Returns results employees from Job Data
- **Person Filter:** Returns results from Modify a Person

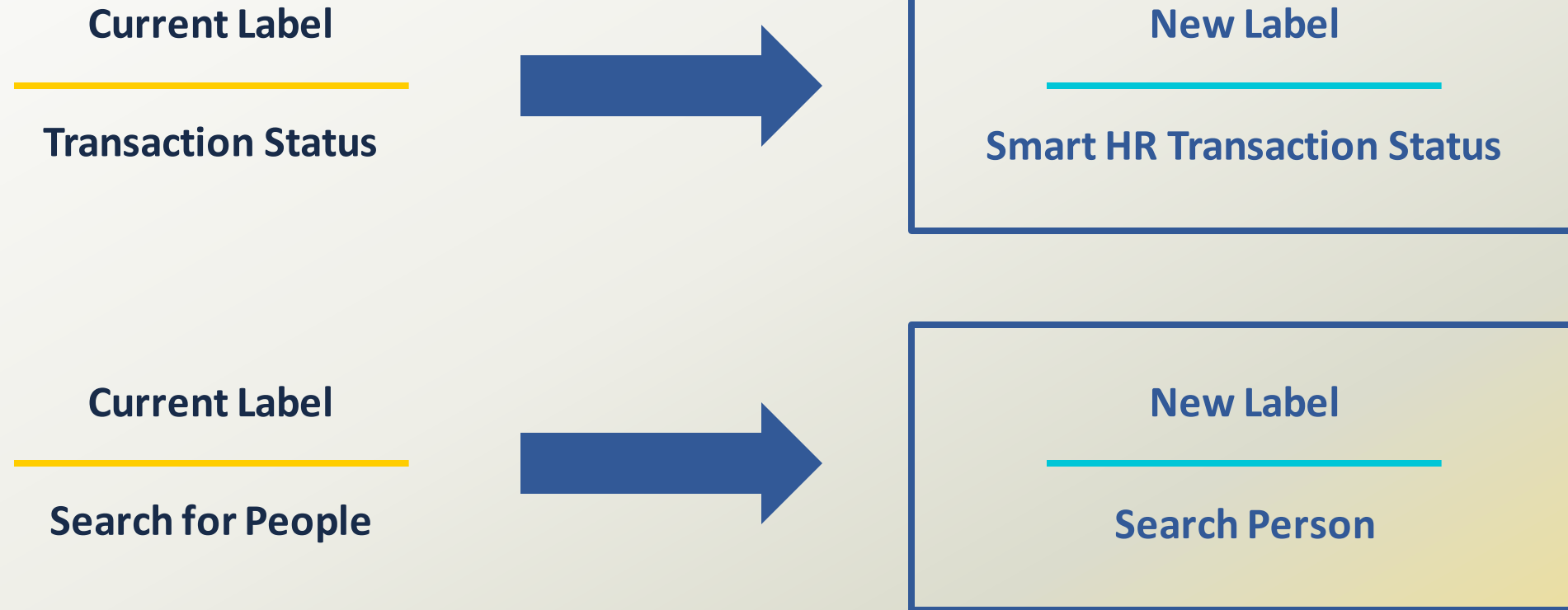


Annual UCPath Upgrade – Breadcrumbs (Classic Navigation)

For Classic Navigation users, you will now be able to see **breadcrumbs** in the **NavBar**.



Annual UCPath Upgrade – Label Changes



Page Navigation:

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

Main Menu > PeopleSoft Homepage > HR Tasks > *Search Person*

Manage Job Tile

What is the purpose?

- Phase 1 of the multi-year Replace PayPath project (local pilot release)
- Provides a modernized solution to accurately and reliably process job data information directly in UCPATH

Who will this impact?

- All current PayPath transactors will be able to see the Manage Job tile as a *view-only page*
- Early adopters from Central Offices will be able to *transact* using the Manage Job tile functionality before all transactors can transact within the tile

What's coming?

- If you currently have access to PayPath pages today, continue to use PayPath and Smart HR Templates until pilot phase is complete.
- Local leadership will determine the right opportunity to release the Manage Job tile to all transactors

Manage Job Tile – Important Context

1

PayPath is a **custom module** built for University of California.

2

If UC didn't have a custom module, we would be using the **Manage Job** tile to maintain Job Data.

3

UCPC is **adding** the Manage Job tile functionality in UCPath system.

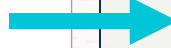
Early adopters will use this new functionality **before** transactors have access.

4

With the new Manage Job tile, transactors now have **another screen to view** Job Data.

Manage Job Tile – View Only Page

If you have access to PayPath pages today, you will see the Manage Job tile as a **View-Only** page.



Note: the search results will display the **same information** that you currently see in Job Data.

Manage Job

Search Existing

Search Criteria

My Saved Searches

Empl ID	begins with	<input type="text" value="1042"/>	HR Status	begins with	<input type="text"/>
Empl Record	=	<input type="text"/>	Payroll Status	begins with	<input type="text"/>
Name	begins with	<input type="text"/>	Position Number	begins with	<input type="text"/>
Legal Last Name	begins with	<input type="text"/>	Business Unit	begins with	<input type="text"/>
Legal First Name	begins with	<input type="text"/>	Department	begins with	<input type="text"/>
Legal Middle Name	begins with	<input type="text"/>	Job Code	begins with	<input type="text"/>

Include History

Basic Search

> My Recent Searches

Lived Name

What is the purpose?

- Support the [Gender Recognition and Lived Name Policy](#)

Who will this impact?

- All transactors
- All employees

What's coming?

- The **Name** field in the UCPath system will now show an employee's *self-chosen name*
- Changes in this presentation are specific to UCPath system only*

Why is it important to obtain and use a person's Lived Name?



1

Names hold meaning and value and are an **essential part of our identity**.



2

Names are a core part of how we are introduced and how others **understand** us



3

For transgender people, having a self-chosen name is a critical part of asserting their **humanity and existence**.



4

Respecting and using a person's name fosters an **inclusive community**.

How do I update my name in UCPATH?

If you choose to use a self-chosen name, make the changes before Friday, June 16, 2023 @ 3:00 pm to have your name display on UCPATH pages beginning on June 20, 2023.

Name changes will be effective the day you make the changes.

A large rectangular area with a light blue background and a blurred image of a person. The text "Changing Name in UCPATH" is centered in the image in a large, bold, black font.

Changing Name in UCPATH

How do I search for employees in UCPATH?

The best way to search for employees in UCPATH is to use the employee's **EMPLID**.

My name is Daniela.
I use she/her pronouns.



My legal first name is Daniela,
and I go by Daniela.

Search for Daniela using her
EMPLID or name, "Daniela".

My name is Bob.
I use he/him pronouns.



My legal first name is Robert,
but I go by Bob.

Search for Bob using his EMPLID
or name, "Robert" or "Bob".

My name is Finn.
I use they/them pronouns.



Please call me Finn.
I do not use my legal name.

Search for Finn using their
EMPLID or name, "Finn".

How do I find an employee's EMPLID?

If you don't have an employee's EMPLID, find it in UCPATH using **Search Person/Search Match**:



Hire Template

If the employee provides you with a self-chosen name **at the time of hire**, you **will be able to** enter it on the Hire Template.

The screenshot displays the HR system interface. On the left, a sidebar menu lists various HR tasks, with 'Smart HR Transactions' highlighted. The main content area shows the 'Smart HR Transactions' section, specifically the 'Enter Transaction Information' form. The form includes fields for 'Template' (UC_FULL_HIRE), 'Effective Date' (05/31/2023), 'Employee ID' (NEW), 'Name', and 'Action/Action Reason' (HIR/HIR (Hire - No Prior UC Affiliation)). Below this, there are tabs for 'Personal Data', 'Job Data', 'Earns Dist', and 'Employee Experience'. The 'Employee Information' section is expanded, showing fields for 'Legal Name/Name' (Legal First Name, Legal Middle Name, Legal Last Name, Legal Suffix) and 'Name - Legal Name/Name' (First Name, Middle Name, Last Name). A red box highlights the 'First Name' and 'Middle Name' fields. Other sections include 'Birthday Information' (Date of Birth), 'Person Education Level' (Highest Education Level: A), and 'Person National ID United States' (National ID Type: PR, National ID).

Lived Name – UCPath Pages that Display *Legal Name Only*

Module	Page Name	Page Navigation
Employee Self-Service	CA State – W4	Main Menu > Employee Actions > Income and Taxes > CA State - W4
Employee Self-Service	Federal Withholding	Main Menu > Employee Actions > Income and Taxes > Federal Withholding
Employee Self-Service	Add Dependent	Main Menu > Employee Actions > Personal Information > Personal Information Summary
Payroll	Review Paycheck	Main Menu > PeopleSoft Homepage > Payroll Tasks > Paycheck > Review Paycheck
Payroll	Review Paycheck Summary	Main Menu > PeopleSoft Homepage > Payroll Tasks > Paycheck > Review Paycheck Summary
Payroll	General Deduction Entry Update	Main Menu > PeopleSoft Homepage > Payroll Tasks > Deductions > General Deduction Entry Update
Workforce Administration	Admin Verification of Employment	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Admin Verification of Employment
Workforce Administration	Search Person	Main Menu > PeopleSoft Homepage > HR Tasks > Search Person

Lived Name – UCPATH Pages that Display *Both* Name and Legal Name

Module	Page Name	Page Navigation
Workforce Administration	Job Data	Main Menu > PeopleSoft Homepage > HR Tasks > Job Data Related > Job Data
Workforce Administration	Modify a Person	Main Menu > PeopleSoft Homepage > HR Tasks > Personal Data Related > Modify a Person
Workforce Administration	Workforce Job Summary	Main Menu > PeopleSoft Homepage > HR Tasks > Job Data Related > Workforce Job Summary

Lived Name – Search Fields

Name

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

Search Clear

Legal Name

Review Paycheck 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

Company begins with

Pay Group begins with

Pay Period End Date =

Off Cycle?

Page Nbr =

Line Nbr =

Paycheck Number =

Empl ID begins with

Legal Name begins with

Case Sensitive

Search Clear

Both

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 Choose from 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 =

Lived Name – BE MINDFUL!



Remember to *BE MINDFUL*.

You may see an employee's legal name or receive a legal name from an external vendor.

Always refer to employees by the name provided in the **Name** field in UCPath.

Preparing for the Changes

Before Go-Live

- Approve all AWE transactions by **Monday, June 12 EOD**
- Review the project spaces and project demos
- Subscribe to our local UCPATH communications

UCPath System Downtime

- The UCPATH system will be **UNAVAILABLE** from **Friday, June 16, 3:00 pm** to **Monday, June 19, 9:00 pm**
- During the downtime, employees, managers, and transactors will not have access to the system.

Post Go-Live Support

- All changes are targeted to go-live on Tuesday, June 20
- Bring any questions you have to our June Release Office Hours on June 20, June 21, June 22, and July 10
- Important project updates will be shared via UCPATH Alerts

Local Resources | UCPATH Project Space

The [UCPath June Release Project Space](#) contains links to Lived Name, Manage Job, and Annual UCPATH Upgrade pages and resources within the expandable drawers.

Lived Name

- [Lived Name Project Space](#)
 - Expand all drawers within page for project definitions, demos, and more
- [Gender Recognition and Lived Name Policy](#)
- [Searching for Employees in UCPATH graphic](#)
- Micro Learning Videos:
 - [How to Use Search Person/Search Match to Find EMPLID in UCPATH](#)
 - [Changing Name in UCPATH](#)
- [UCPATH Page Labels for Lived Name guide](#)

Manage Job

- [Manage Job Tile \(Replace PayPath\) Project Space](#)
 - Expand all drawers within page for project demos, screenshots, and more

Annual UCPATH Upgrade

- [Annual UCPATH Upgrade Project Space](#)
 - Expand all drawers within page for project demos, screenshots, and more

Local Resources | UC San Diego Services & Support

If you run into **any issues** with any of the June Release projects, submit a case to the local UCPath support team through our Services & Support portal.

The screenshot shows the UC San Diego Services & Support portal. At the top left is the UC San Diego logo and "Services & Support". At the top right is a dropdown menu for "Payroll, Academic Personnel & HR". Below this is a navigation bar with "Find Answers", "Get Help & Order Services", "My Stuff", and "Agent View". On the right of the navigation bar is a user profile for "Bea Katrina Florentino". The main content area features a large header "Payroll, Academic Personnel & HR" over an aerial view of a campus. Below the header is a search bar. At the bottom, there are three main action buttons: "FIND ANSWERS" (Browse information about UCPath), "GET HELP & ORDER SERVICES" (Submit a ticket and order services), and "MY TICKETS" (View incidents & requests you've submitted to UC Path Services).

UC *Path*†

UC San Diego

