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

- Recently Visited Pages
- Favorites
- Home

Actions Menu
Add to Favorites, New Window, Help

New
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

Current Label
Transaction Status

New Label
Smart HR Transaction Status

Current Label
Search for People

New Label
Search Person

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

<table>
<thead>
<tr>
<th>What is the purpose?</th>
<th>Who will this impact?</th>
<th>What’s coming?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Phase 1 of the multi-year Replace PayPath project (local pilot release)</td>
<td>• All current PayPath transactors will be able to see the Manage Job tile as a <em>view-only page</em></td>
<td>• If you currently have access to PayPath pages today, continue to use PayPath and Smart HR Templates until pilot phase is complete.</td>
</tr>
<tr>
<td>• Provides a modernized solution to accurately and reliably process job data information directly in UCPath</td>
<td>• Early adopters from Central Offices will be able to <em>transact</em> using the Manage Job tile functionality <em>before</em> all transactors can transact within the tile</td>
<td>• Local leadership will determine the right opportunity to release the Manage Job tile to all transactors</td>
</tr>
</tbody>
</table>

Manage Job Tile Project Space
PayPath is a custom module built for University of California.

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

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

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

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

Gender Recognition and Lived Name Policy
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.
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”.

**Searching for Employees in UCPath Graphic**
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**: 

[Image of people in a meeting]
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.
### Lived Name – UCPath Pages that Display *Legal Name Only*

<table>
<thead>
<tr>
<th>Module</th>
<th>Page Name</th>
<th>Page Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Self-Service</td>
<td>CA State – W4</td>
<td>Main Menu &gt; Employee Actions &gt; Income and Taxes &gt; CA State - W4</td>
</tr>
<tr>
<td>Employee Self-Service</td>
<td>Federal Withholding</td>
<td>Main Menu &gt; Employee Actions &gt; Income and Taxes &gt; Federal Withholding</td>
</tr>
<tr>
<td>Employee Self-Service</td>
<td>Add Dependent</td>
<td>Main Menu &gt; Employee Actions &gt; Personal Information &gt; Personal Information Summary</td>
</tr>
<tr>
<td>Payroll</td>
<td>Review Paycheck</td>
<td>Main Menu &gt; PeopleSoft Homepage &gt; Payroll Tasks &gt; Paycheck &gt; Review Paycheck</td>
</tr>
<tr>
<td>Payroll</td>
<td>Review Paycheck Summary</td>
<td>Main Menu &gt; PeopleSoft Homepage &gt; Payroll Tasks &gt; Paycheck &gt; Review Paycheck Summary</td>
</tr>
<tr>
<td>Payroll</td>
<td>General Deduction Entry Update</td>
<td>Main Menu &gt; PeopleSoft Homepage &gt; Payroll Tasks &gt; Deductions &gt; General Deduction Entry Update</td>
</tr>
<tr>
<td>Workforce Administration</td>
<td>Admin Verification of Employment</td>
<td>Main Menu &gt; PeopleSoft Homepage &gt; HR Tasks &gt; Personal Data Related &gt; Admin Verification of Employment</td>
</tr>
<tr>
<td>Workforce Administration</td>
<td>Search Person</td>
<td>Main Menu &gt; PeopleSoft Homepage &gt; HR Tasks &gt; Search Person</td>
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Lived Name – UCPath Pages that Display *Both* Name and Legal Name

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</tr>
<tr>
<td>Workforce Administration</td>
<td>Modify a Person</td>
<td>Main Menu &gt; PeopleSoft Homepage &gt; HR Tasks &gt; Personal Data Related &gt; Modify a Person</td>
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<tr>
<td>Workforce Administration</td>
<td>Workforce Job Summary</td>
<td>Main Menu &gt; PeopleSoft Homepage &gt; HR Tasks &gt; Job Data Related &gt; Workforce Job Summary</td>
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</table>
Lived Name – Search Fields

Name

Legal Name

Both
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 UCP path communications](#)

**UCPath System Downtime**

- The UCP path 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 UCP path Alerts

UCPath June Release Project Space
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

https://ucpath.ucsd.edu/
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.

https://support.ucsd.edu/path