Job Aid: UCPath Basics and Navigation

Overview

Use this job aid to learn the basic concepts and steps on how to navigate the UCPath system.

Contents

- Accessing UCPath
- UCPath Dashboard Menu Structure
- UCPath PeopleSoft Menu Structure
- Homepages, Tiles, and Security Roles
- Navigation Collections
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- Global Search
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- Keyboard Shortcuts
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Accessing UCPath

Access UCPath by typing ucpath.universityofcalifornia.edu in your browser's address bar.

> ⚠ The URL in the address bar may appear differently when the page opens in the web browser. Either version may be captured when creating bookmarks.

Signing In

Log in to UCPath using your UC network user ID and password. Please note, the UCPath System times out after 60 minutes of inactivity; any unsaved data entry will be lost.

Signing Out

Always sign out of UCPath System. Sign out of your current session by clicking the **Log Out** link in the upper right corner. Do not close the browser tab or window, or go to another site, as a method of closing UCPath.

Tips

- Prior to logging in to UCPath System, turn off your web browser's pop-up blocker feature.

> ⚠ Refer to the *UCPath Disable Pop-Up Blocker* job aid for more information.

- To maximize your browser window, press **F11** on your keyboard. Press **F11** again to exit full-screen mode.

> ⚠ Your browser may use a different keyboard shortcut to enter/exit full screen mode.

- Do not use your web browser's forward and back buttons to navigate. This may work on some pages some of the time, but in other situations, it can cause data loss in the UCPath System. Always navigate with the UCPath System's buttons and menus.

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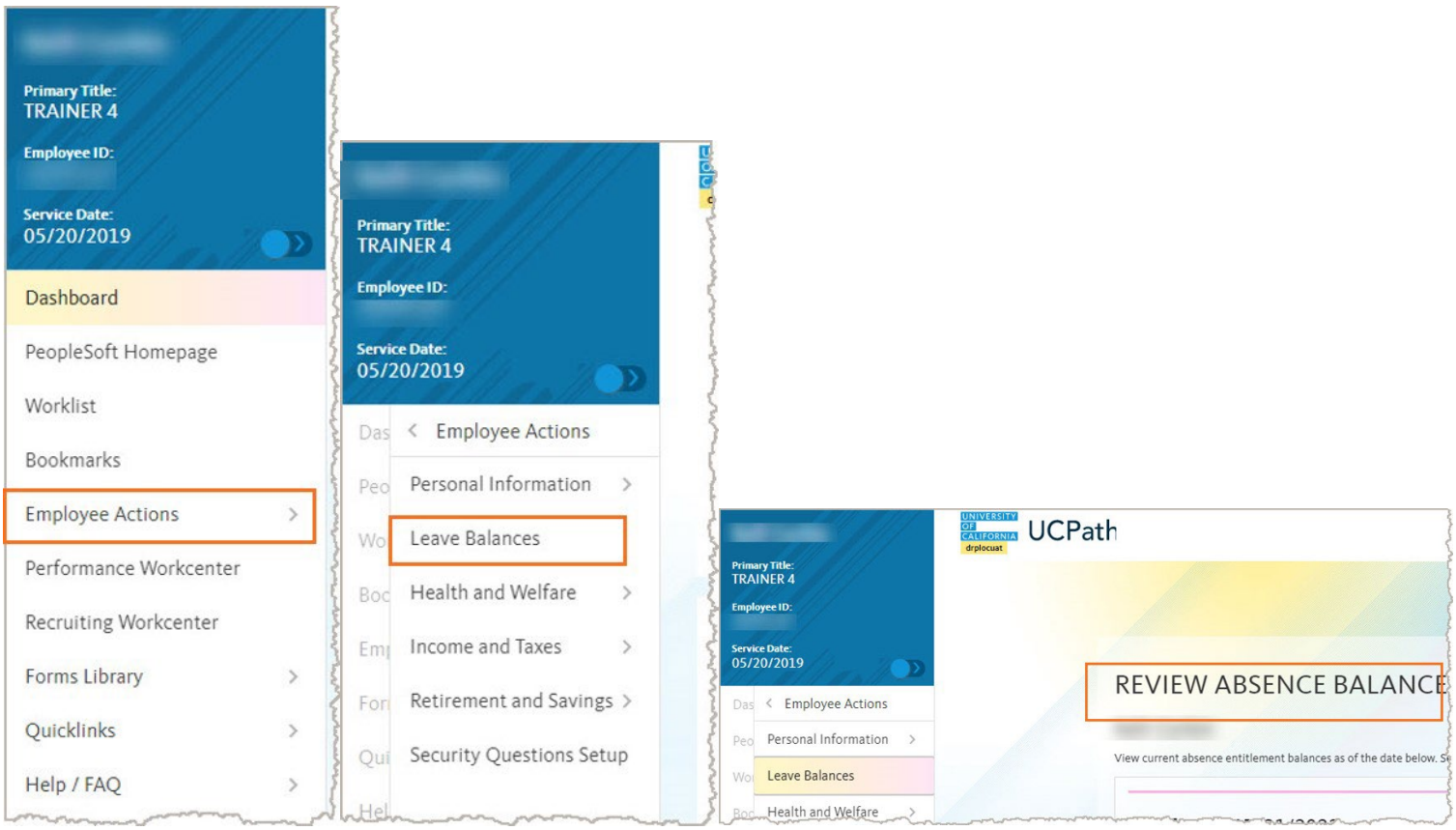
UCPath Dashboard Menu Structure

The UCPath System uses cascading menus to display a hierarchy of submenus you use to navigate to various application pages and components (page groups).

The top-level menu (far left example in the image that appears below) includes **PeopleSoft Homepage, Employee Actions, Help / FAQ,** and other standard options.

Continue to drill down to find pages and components for the tasks you perform in the UCPath System (far right example).



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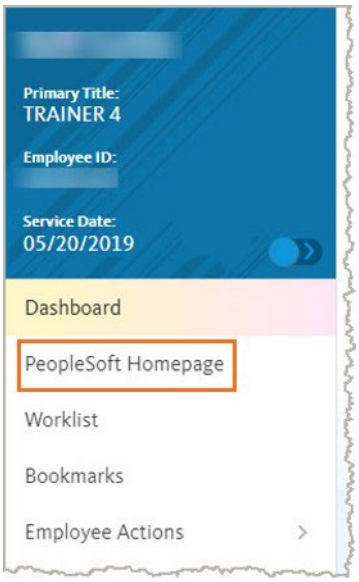
UCPath PeopleSoft Menu Structure

The UCPath PeopleSoft System uses a topic or process path structure to navigate.

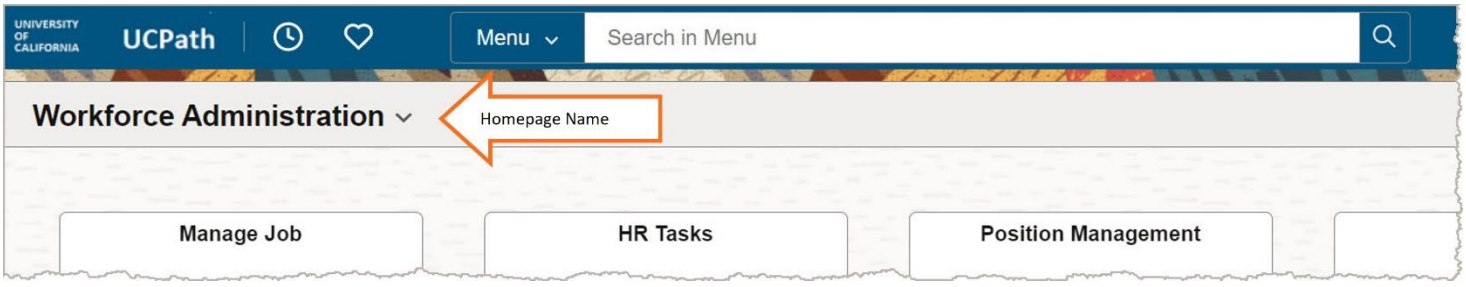
Click on the **PeopleSoft Homepage** link to access the UCPath PeopleSoft System.



Homepages, Tiles, and Security Roles

PeopleSoft opens your default **Homepage** in a new tab.

Homepages are the starting point for UCPath PeopleSoft System navigation.



Tiles are standardized collections of business processes logically grouped together. They provide a quick and easy way to navigate to the pages or screens that you need.

Tiles are not **Homepage** specific and can be found on multiple **Homepages**.

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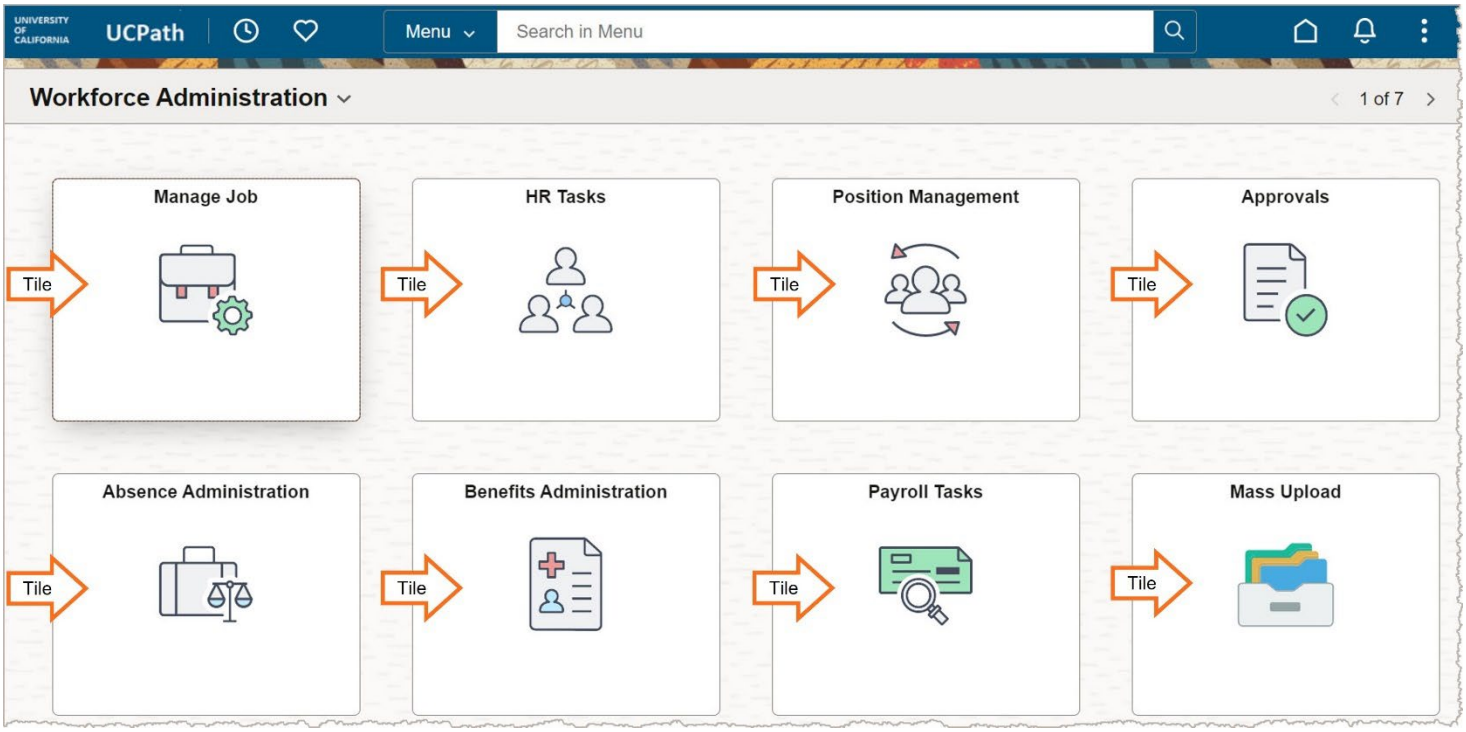
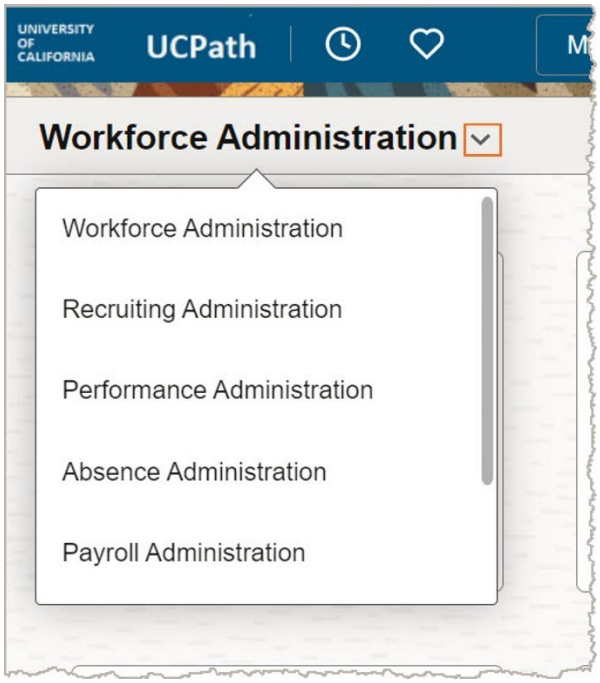
⚠ Your specific security roles determine which **Homepages** and **Tiles** you will see and have access to.



You may have access to more than one **Homepage**. To access the other **Homepages** available to you, click on the dropdown arrow positioned next to the **Homepage** name and select from the list.



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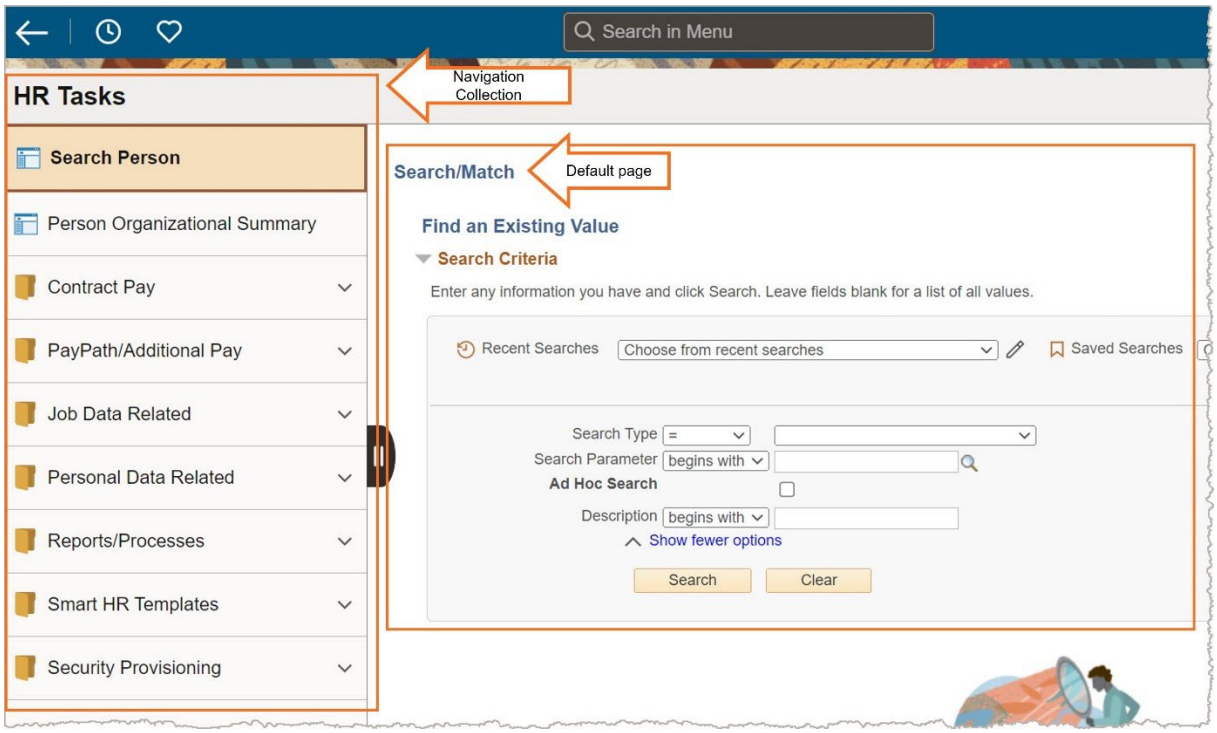
Navigation Collections

Selecting a **Tile** opens a new tab. On the left pane are the folders and pages making up the **Navigation Collection** of this **Tile**. A default page opens in the middle.

These are pages and folders that are functionally similar or are part of a functional process.

Your specific security roles determine which pages and folders you will see and have access to.



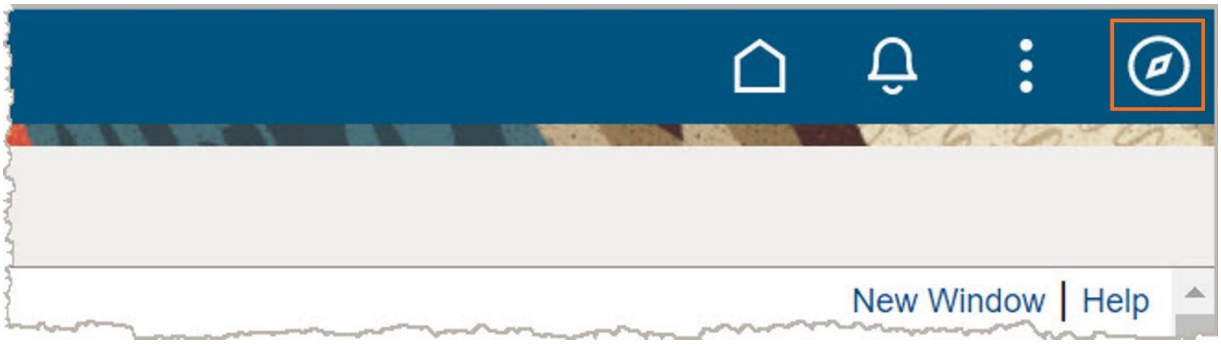
As needed, click on pages or open folders and then select pages.

⚠ Refer to these training resources for information on searching for UCPath data and information:

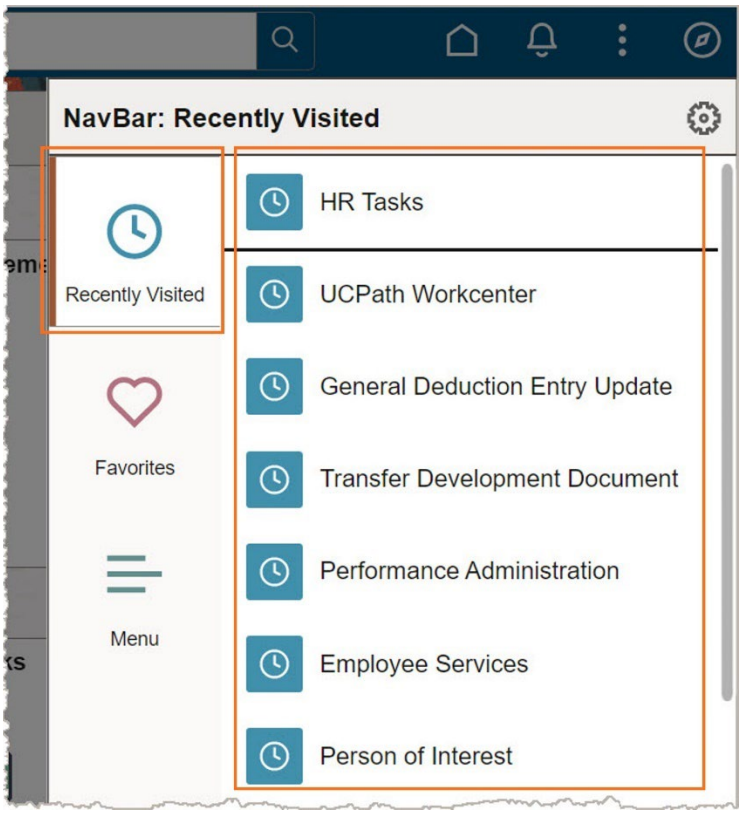
UCPath Search Options
Using Search Pages

Navigation Bar

In the upper right corner is the **Navigation Bar**, which gives you access to several good navigation tools.



Recently Visited lists pages you have navigated to. Select any of these to jump to that page.



You can also access the last ten pages visited in the same **Recently Visited** list from the Quick Access bar found to the left, by clicking on the clock icon .

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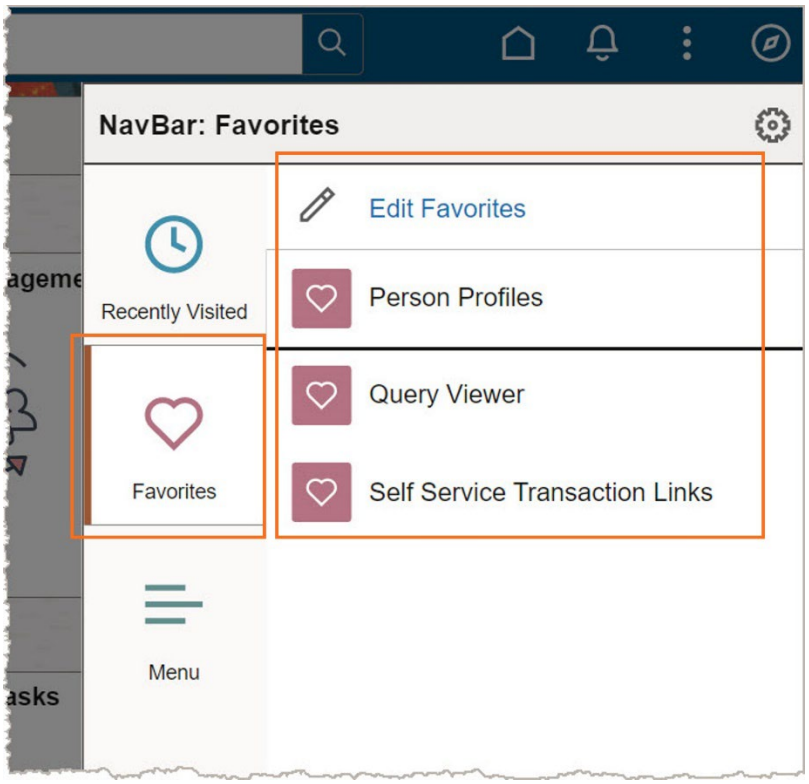
Favorites give you access to any of your saved items and allow you to edit them.

You can use this list to quickly navigate to saved pages or **Navigation Collections** without using **Homepages** or **Tiles**.

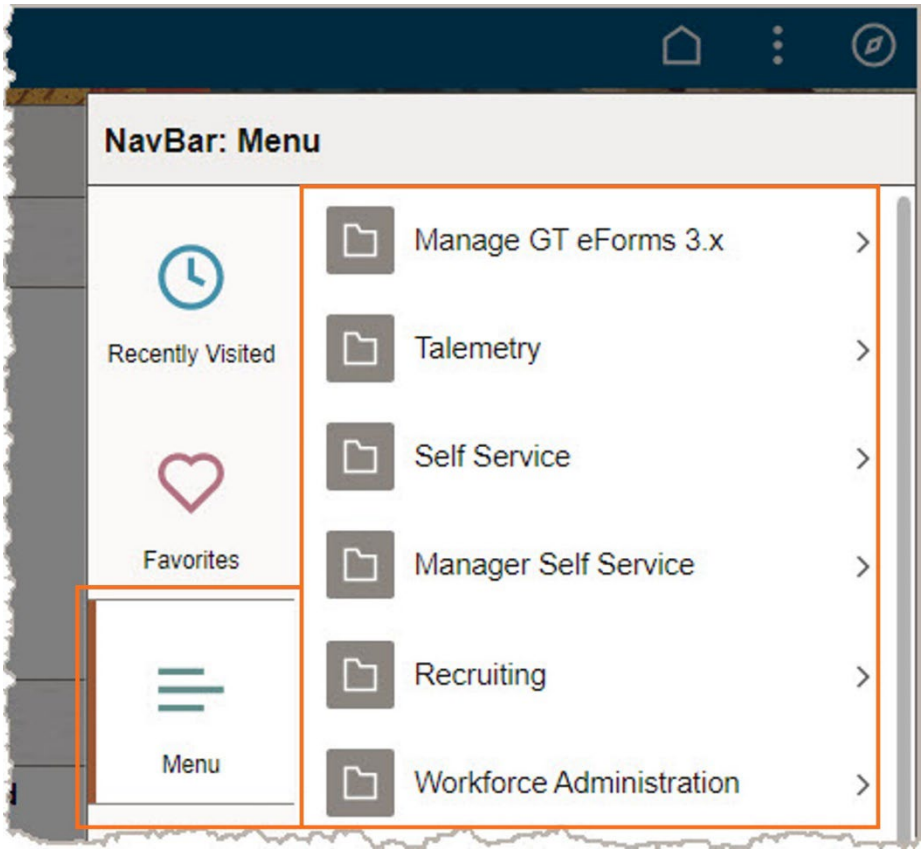


⚠ PeopleSoft pages can only be saved as **Favorites,** they cannot be saved as **Bookmarks** on the **Dashboard**.

You can also access the same **Favorites** list from the Quick Access bar found to the left, by clicking on the heart icon .

To add a Favorite, see the **Actions** section below.

The **Menu** provides another way to navigate to UCPath PeopleSoft System pages.



This method uses cascading menus to display a hierarchy of submenus you use to navigate to various application pages and components (page groups).

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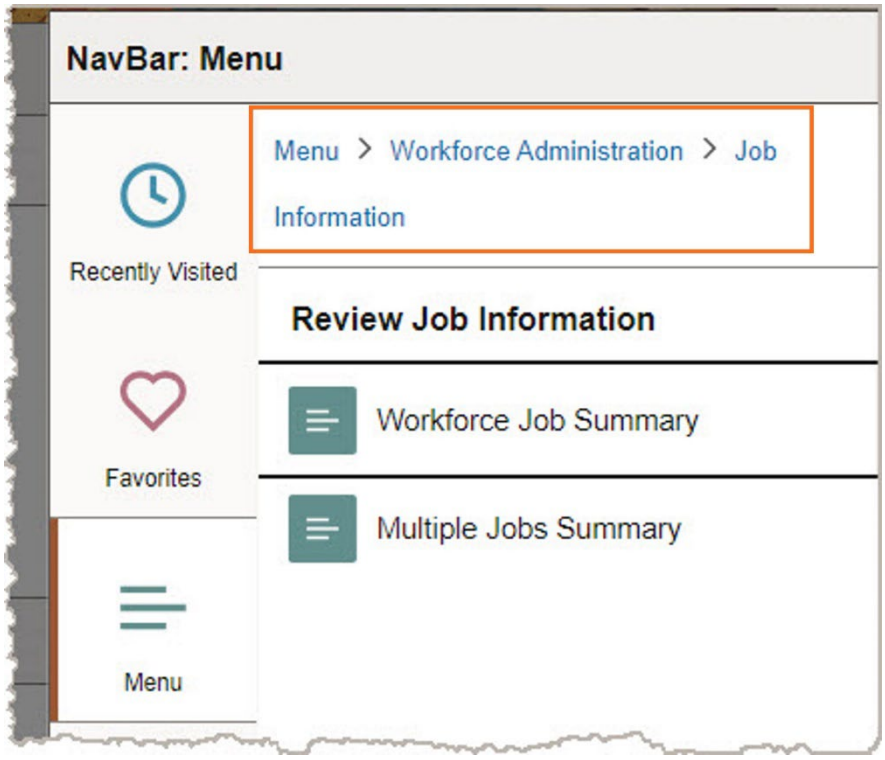


A breadcrumb path is built as selections made.

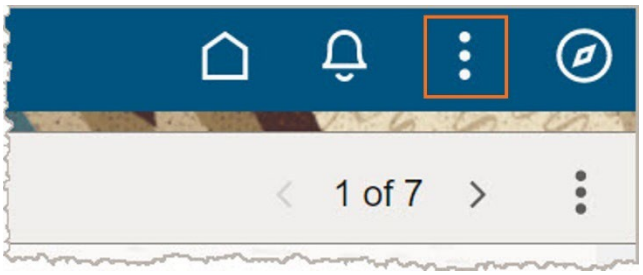
Many of the navigation paths here have an equivalent **Homepage** and **Tile** navigation path.

⚠ Refer to these job aids for cross-reference information:

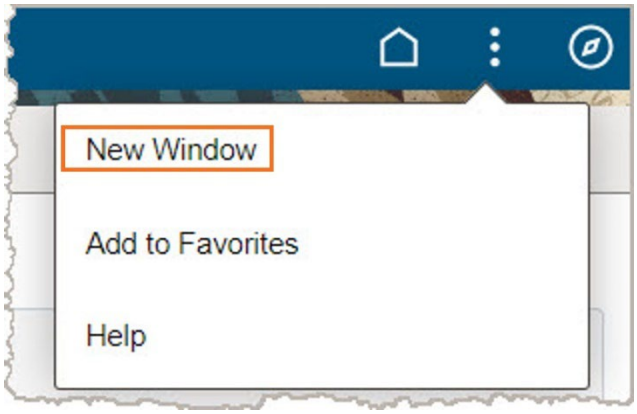
UCPath ABM Navigation
UCPath BEN Navigation
UCPath EPR Navigation
UCPath GL Navigation
UCPath PAY Navigation
UCPath TAM Navigation
UCPath WFA Navigation

Actions

The **Actions** button gives you access to several useful options.

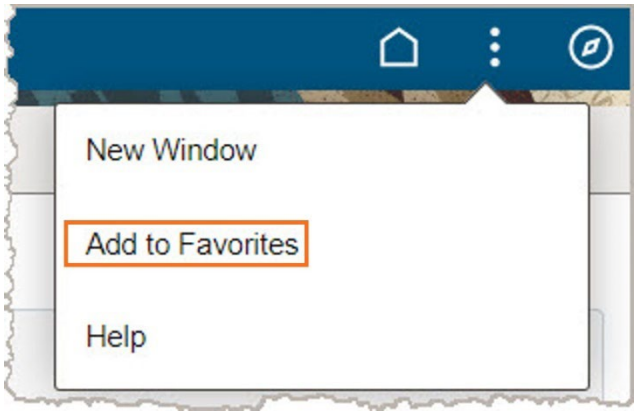


You can open a new window in a new tab using the **New Window** link.



Once you've navigated to a page, it can be added to **Favorites**.

To add, click **Add to Favorites.**



You can add descriptive text to the defaulted name in **Description**, but never remove the name of the page.

Click the **Add** button.

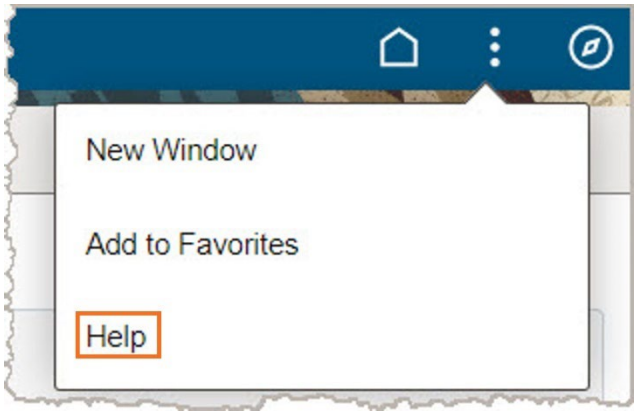
Click **OK** to confirm.

The page is now in **Favorites.**

How you navigated to a page or **Navigation Collection** determines what you'll be able to save as a **Favorite**.

- If you are using the **Menu** or **Global Search,** saving to **Favorites** saves the current page.
- If you navigated from a **Tile** or are on a **Navigation Collection**, saving to **Favorites** saves the current **Navigation Collection**.

Help will take you to the standard PeopleSoft documentation.



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Global Search

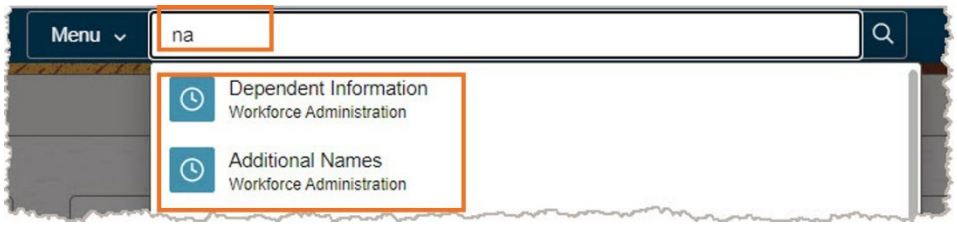
Search in Menu can be used to look throughout the UCPath PeopleSoft System to find the page, **Navigation Collection**, job data or specific person needed to process UCPath data.

⚠ To search for UCPath data refer to:
UCPath Search Options
Using Search Pages
Search for People Using Search/Match

⚠ Results are limited based on your security profile.

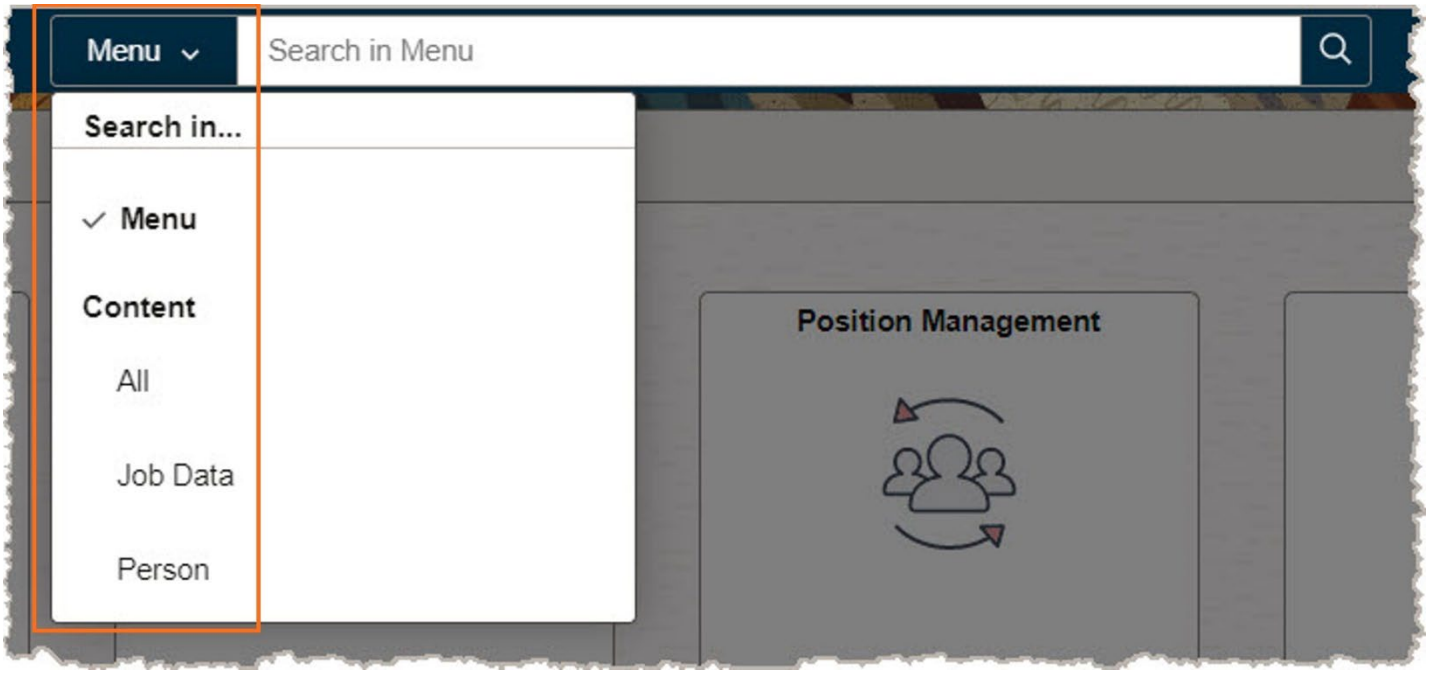
Clicking into the search field automatically creates a list of your recent and saved searches.

As keywords are typed in, search items are dynamically presented for selection.



When needed, use the percent sign (%) as a **wildcard** value to indicate unknown characters, spaces, or numbers.

The default search category is **Menu** but can be changed to **Job Data** or **Person**.



Menu looks for matching pages, **Navigation Collections,** or saved search results.

Job Data looks for matching job data.

Person looks for matching employee data.

To narrow your search, select a search method, enter a search value, and click the hourglass icon.

The search results list, limited by your security access, displays every page or **Navigation Collection** that includes any of the keywords in their **title** or **description.**

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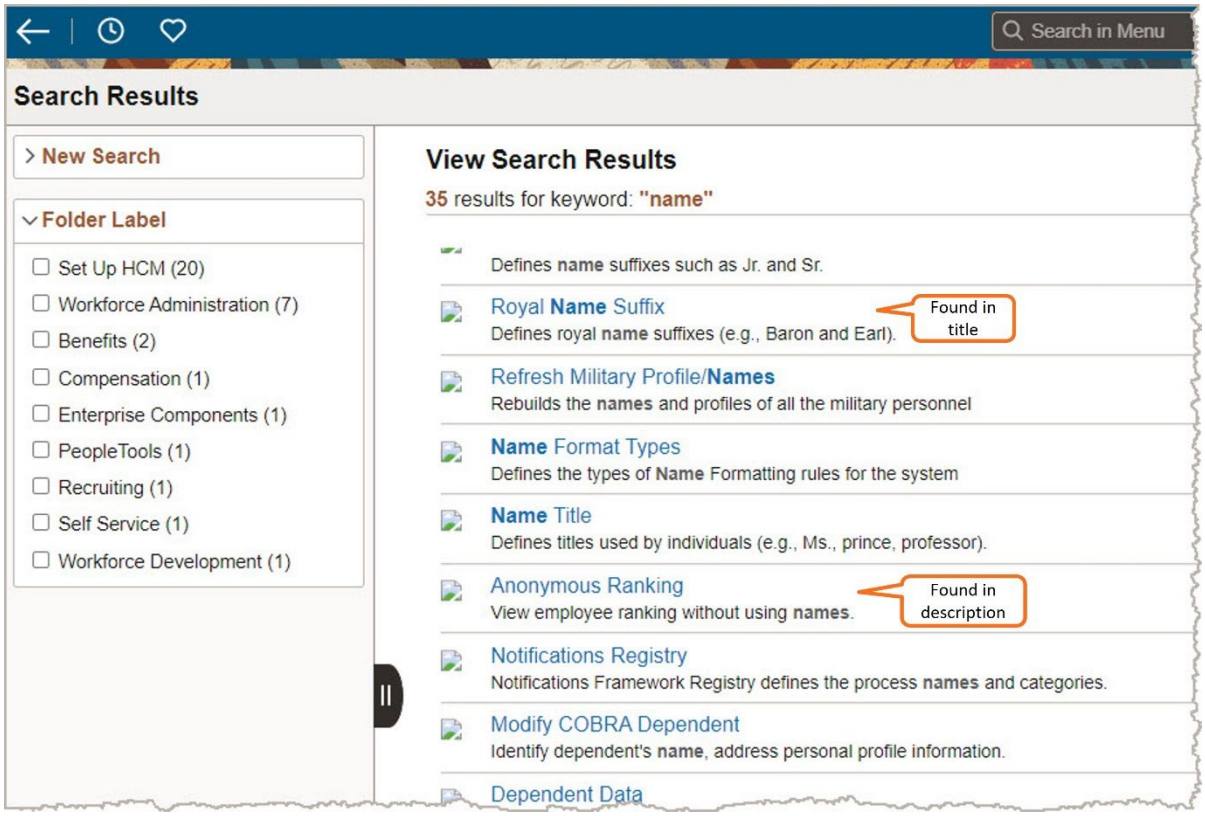
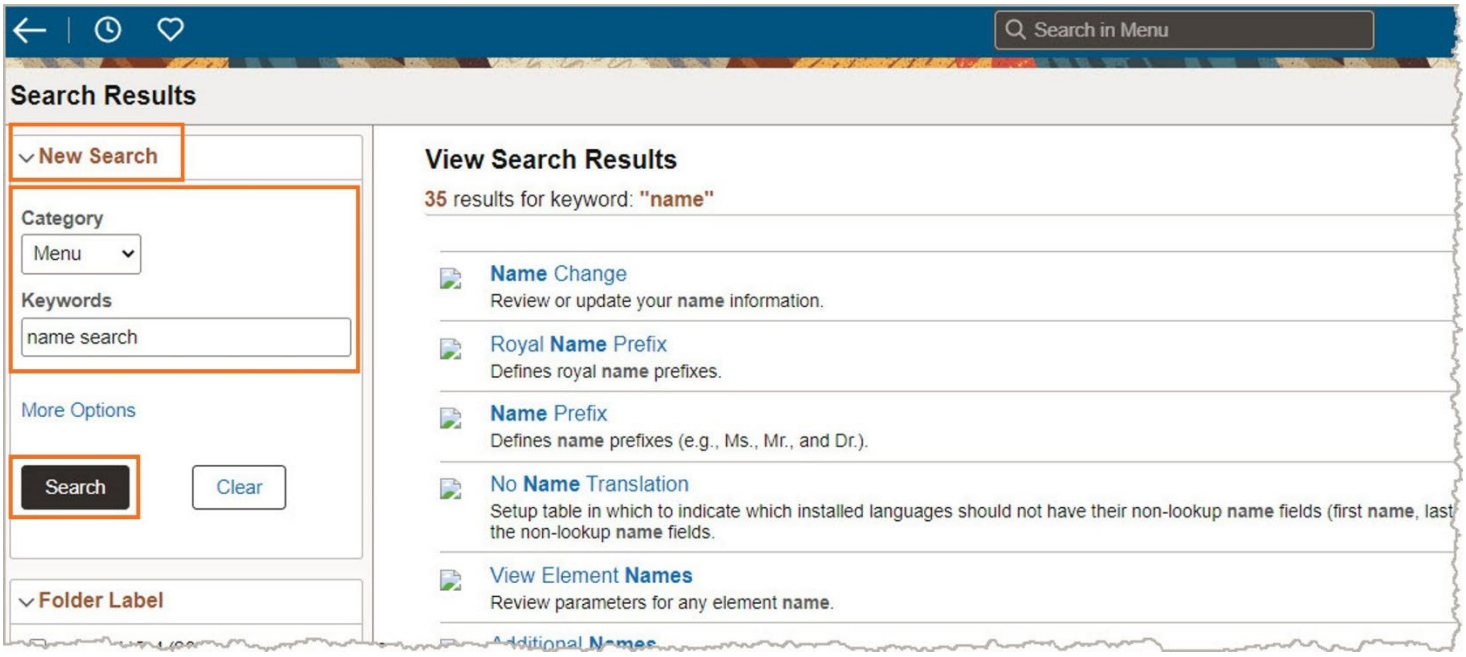
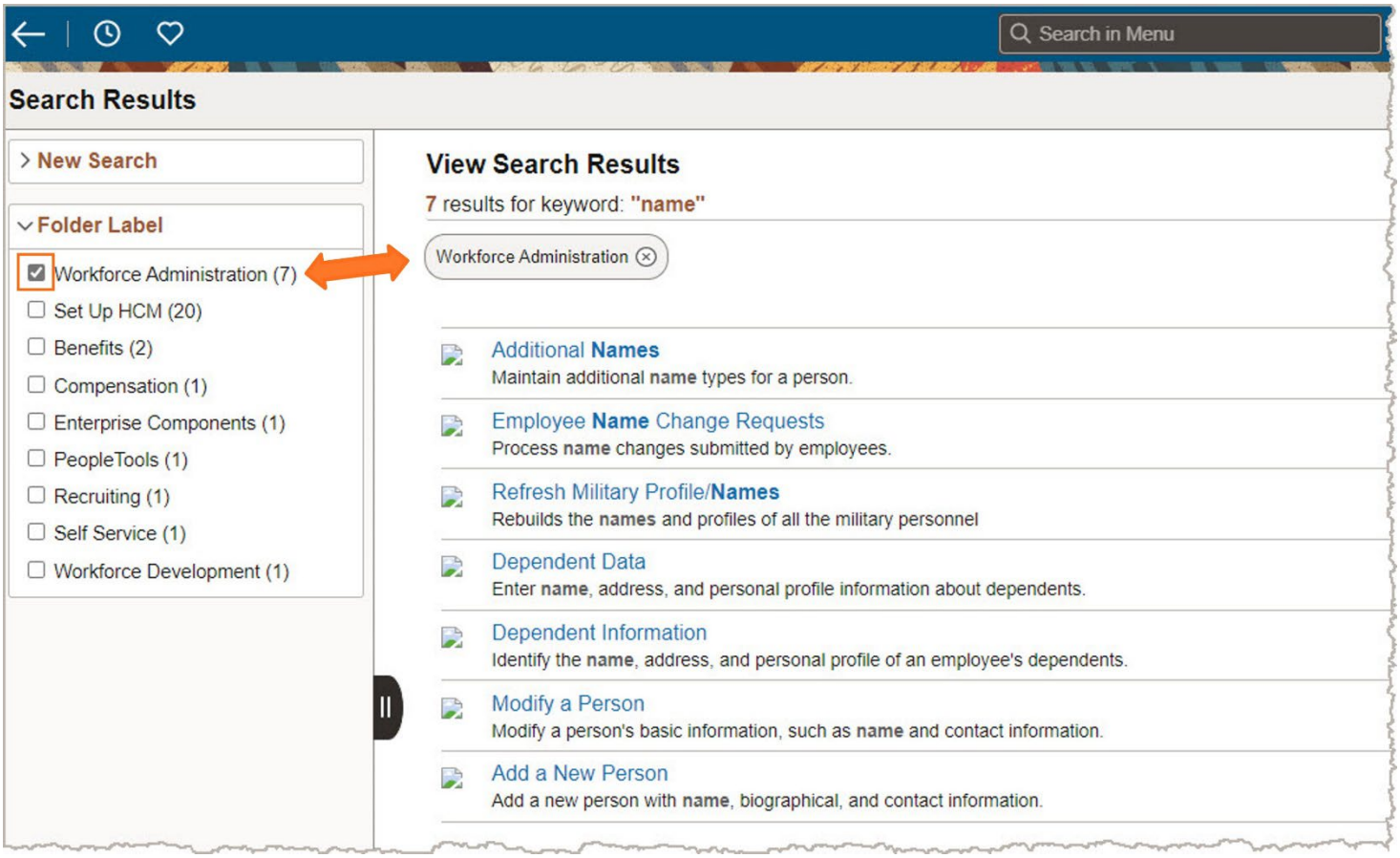


If search results do not include what you're looking for, add or change search values using the **New Search** section and then click the **Search** button to try again.



The **Folder** section lists all the topic folders within the UCPath System where the search keywords can be found. Click the checkboxes to narrow the search results list for a more accurate selection.



Click on any item in the list to open it.

Back

The **Back** button displays in the upper left corner of the banner.

Use this button to navigate back to a **PeopleSoft** page, **Homepage,** or **Navigation Collection** per the label displayed.

⚠ Due to system limitations, some pages do not provide navigation tracking history. Click the **Home** button to return to your **Homepage** if needed.

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Home

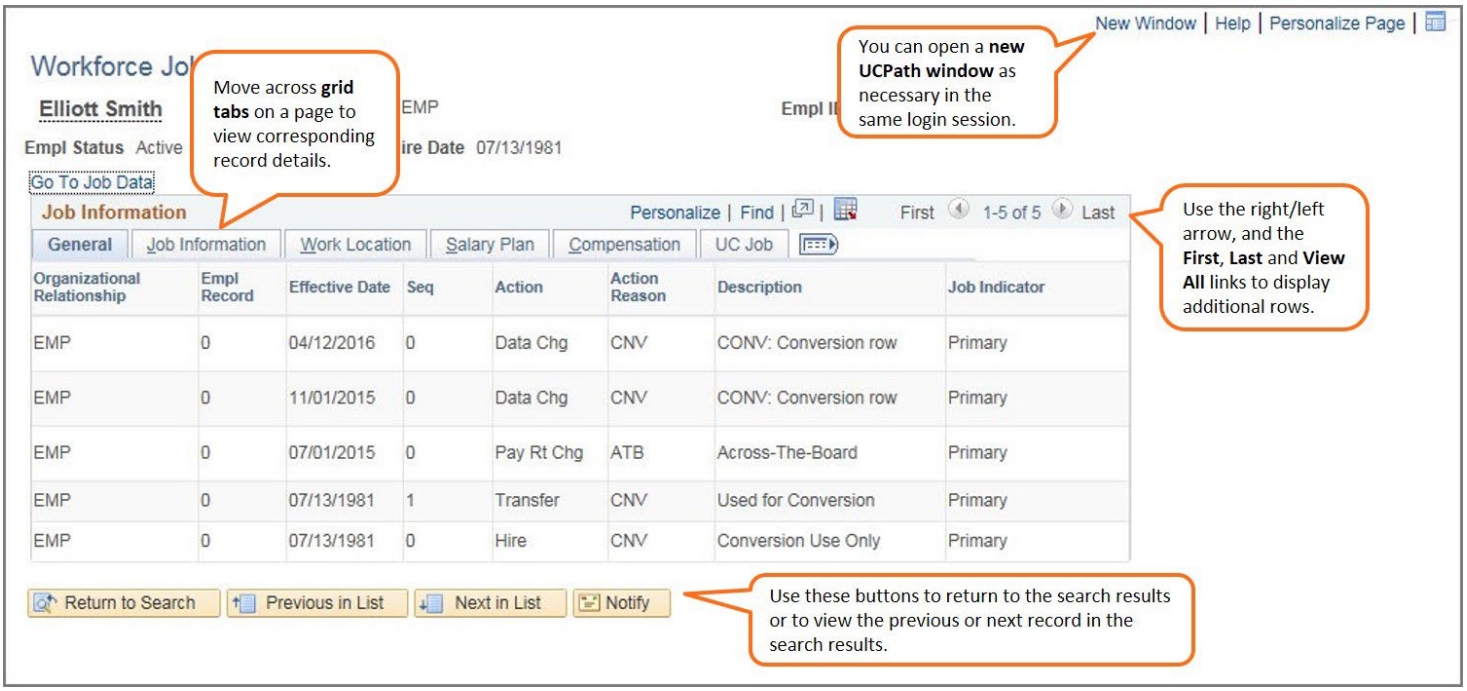
In the upper right corner is the **Home** button.

Click this button at any time to return to your default **Homepage**.

UCPath Page Navigation Features

The UCPath System's browser-based interface contains some navigation elements that are the same regardless of where you navigate in the system.

The following are some basic UCPath System navigation features.

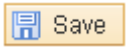
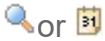
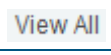


Organizational Relationship	Empl Record	Effective Date	Seq	Action	Action Reason	Description	Job Indicator
EMP	0	04/12/2016	0	Data Chg	CNV	CONV: Conversion row	Primary
EMP	0	11/01/2015	0	Data Chg	CNV	CONV: Conversion row	Primary
EMP	0	07/01/2015	0	Pay Rt Chg	ATB	Across-The-Board	Primary
EMP	0	07/13/1981	1	Transfer	CNV	Used for Conversion	Primary
EMP	0	07/13/1981	0	Hire	CNV	Conversion Use Only	Primary

Keyboard Shortcuts

You can navigate or perform tasks with keyboard shortcuts. The table below provides a list of commonly used shortcuts, a description of the action and the related button or link.

⚠ Press **Ctrl + K** in the UCPath System to display a full list of keyboard shortcuts. (This shortcut may not work in all web browsers.)

Shortcut	Button	Action
Alt+1		Save changes.
Alt+2		Return to search list.
Alt+3		Display the next record in the list.
Alt+4		Display the previous record in the list.
Alt+5		Display lookup values or calendar, depending on the field type.
Alt+7		Insert a new row in the grid.
Alt+8		Delete the currently selected row in the grid.
Alt+0		Refresh page.
Alt+.		Display the next row in the grid.
Alt+,		Display the previous row in the grid.
Alt+/		Display the find feature for the grid.
Alt+'		View all rows in the grid.

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Icons Legend

You can navigate or perform certain tasks by clicking on icons found on the top banner. The table below provides a list of these icons, their name, and details.

Icon	Name	Details
	Recently Visited	A list of pages you have navigated to. Select any of these to jump to that page.
	Favorites	A list of your saved items.
	Home	Click this button at any time to return to your default **Homepage**.
	Actions	Gives you access to **New Window, Favorites,** and **Help.**
	NavBar	Gives you access to **Recently Visited, Favorites,** and **Menu.**