


Job Aid: UCPath Basics and Navigation - DRAFT

Overview

Use this job aid to learn about the basic concepts and steps regarding navigating the UCPath system.

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 current UC network user ID and password. UCPath times out after 60 minutes of inactivity; any unsaved data entry will be lost.

Signing Out

Always sign out of UCPath. 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, 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 when you no longer need to view a full screen.

 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 UCPath. Always navigate with the UCPath buttons and menus.

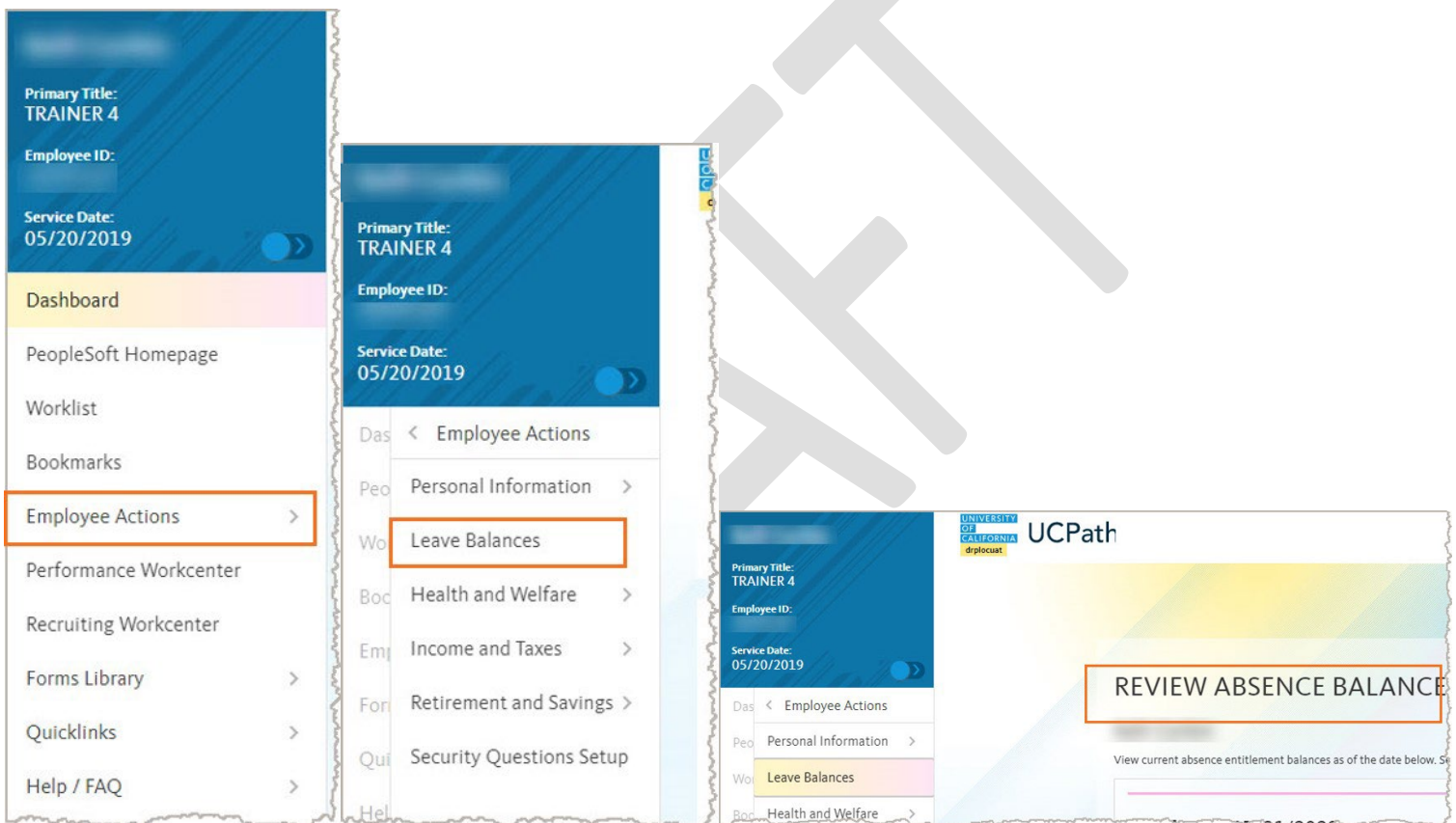
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UCPath Dashboard Menu Structure

UCPath 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 UCPath (far right example).

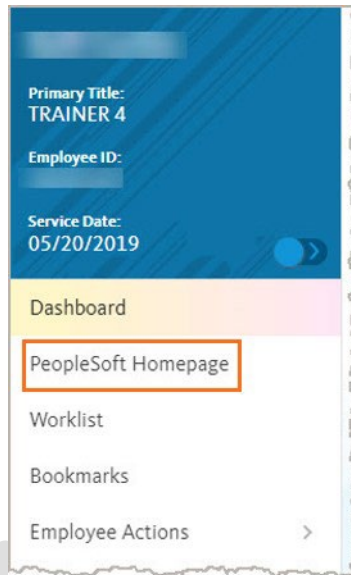


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UCPath PeopleSoft Menu Structure

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

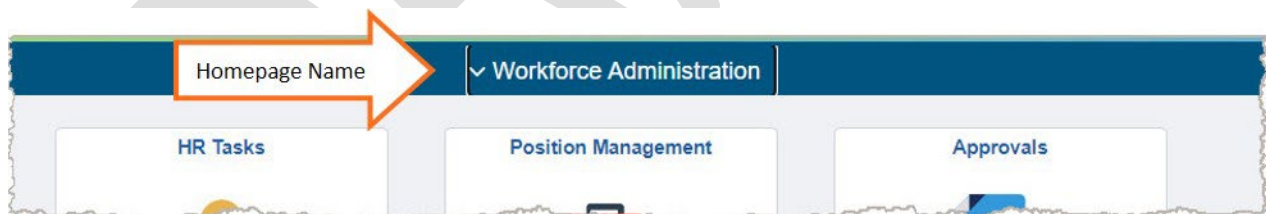
Click on the [PeopleSoft Homepage](#) link to access the PeopleSoft UCPath system.



Homepages, Tiles and Security Roles

PeopleSoft opens your default [Homepage](#) in a new tab.

[Homepages](#) are the starting point for UCPath PeopleSoft system navigation.

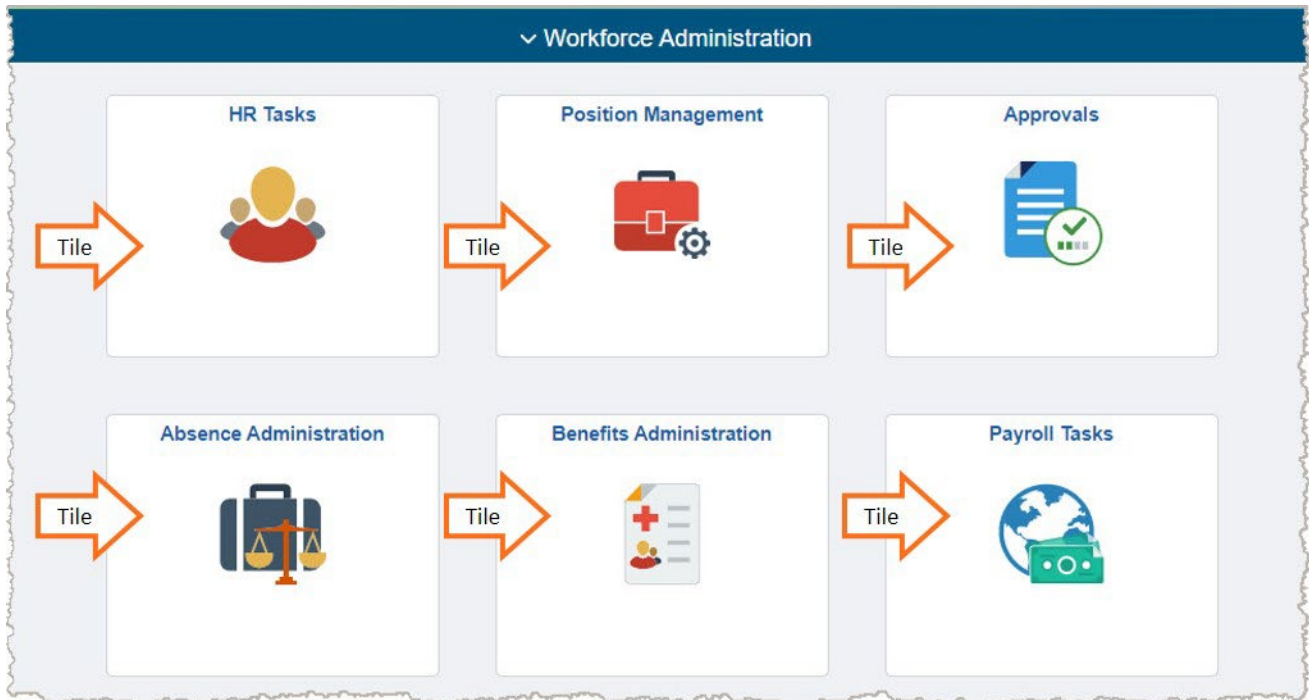


[Tiles](#) are standardized collections of business processes logically grouped together. They provide a quick and easy way to navigate to the pages or screens that you need.

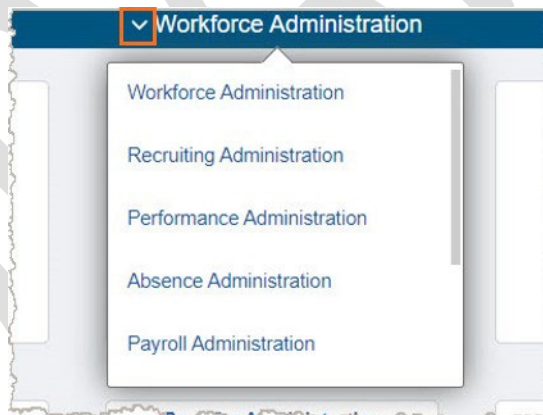
[Tiles](#) are not [Homepage](#) specific and can be found in multiple [Homepages](#).

! Your specific security roles determine which [Homepages](#) and [Tiles](#) you will see and have access to.

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



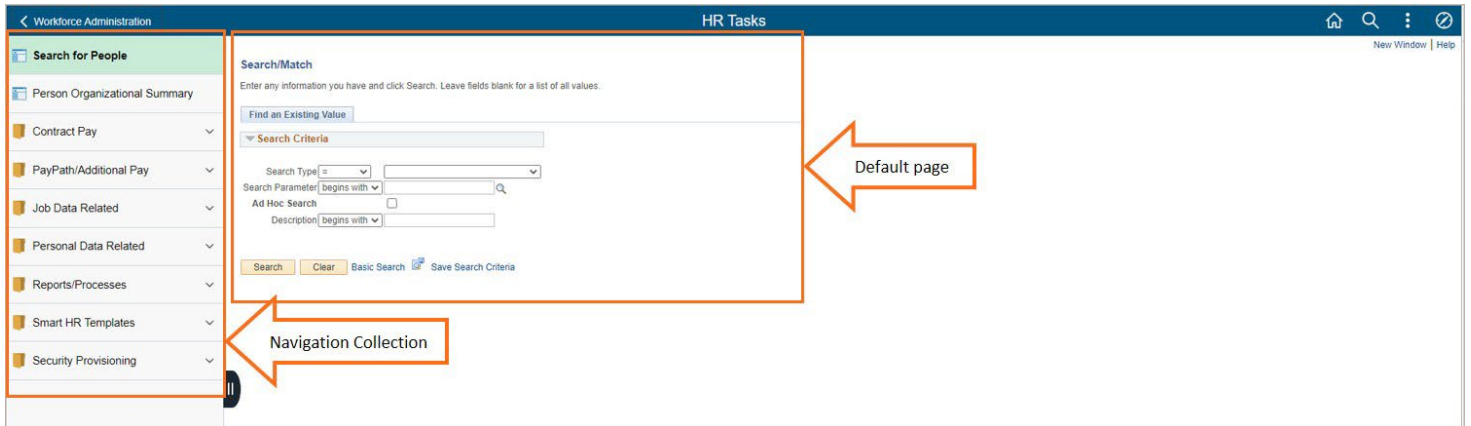
Navigation Collections

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.

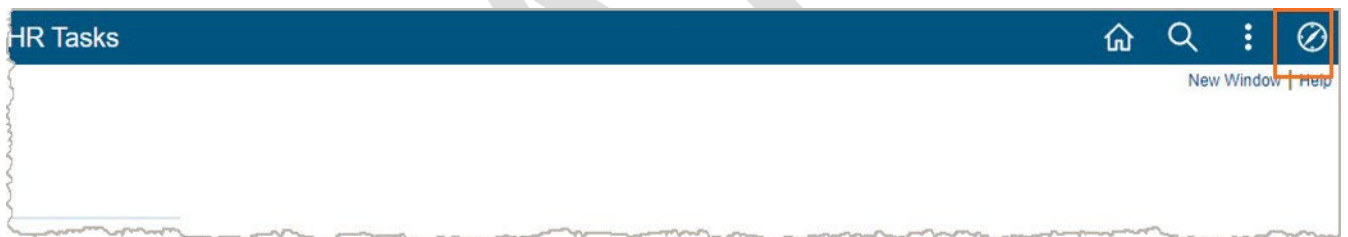
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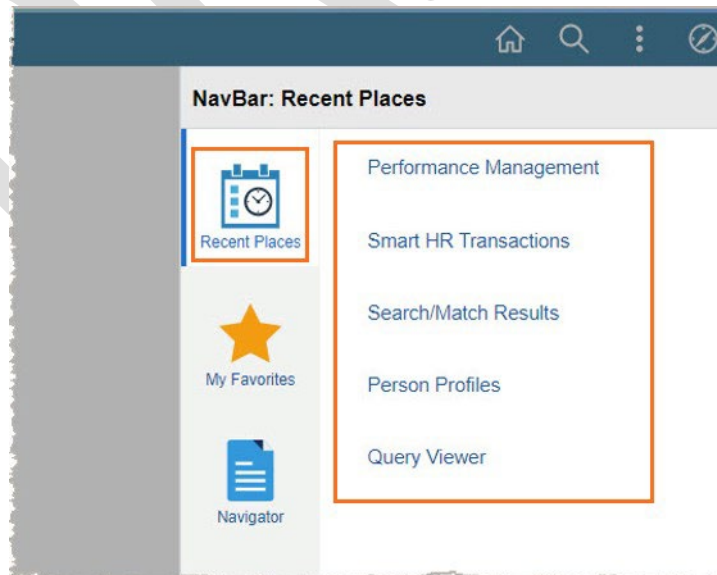
As needed, click on pages or open folders and then select pages.

Navigation Bar

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



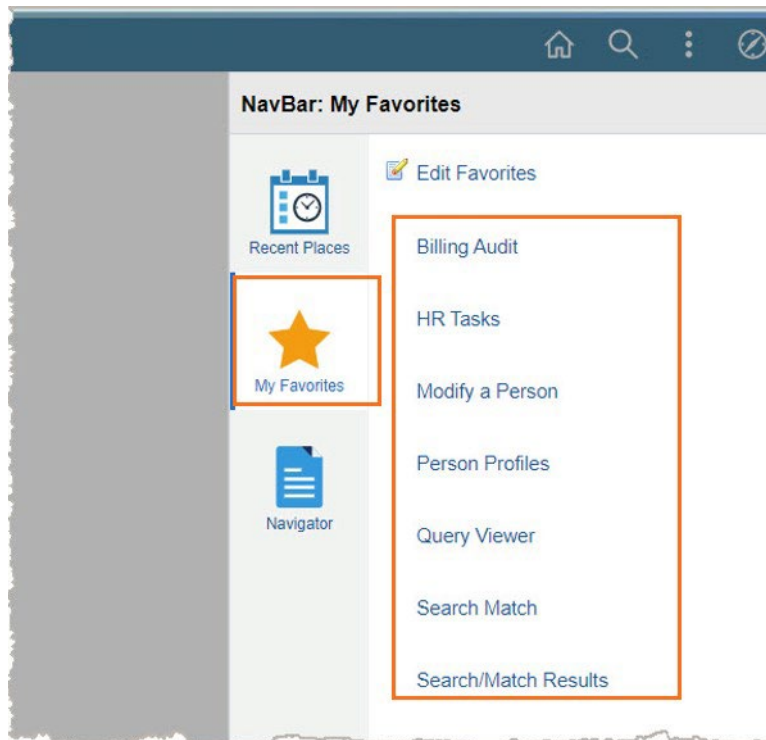
Recent Places lists the last five pages you navigated to. Select any of these to jump to that page.



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My Favorites gives you access to any of your saved Favorites and allows you to edit them here.

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



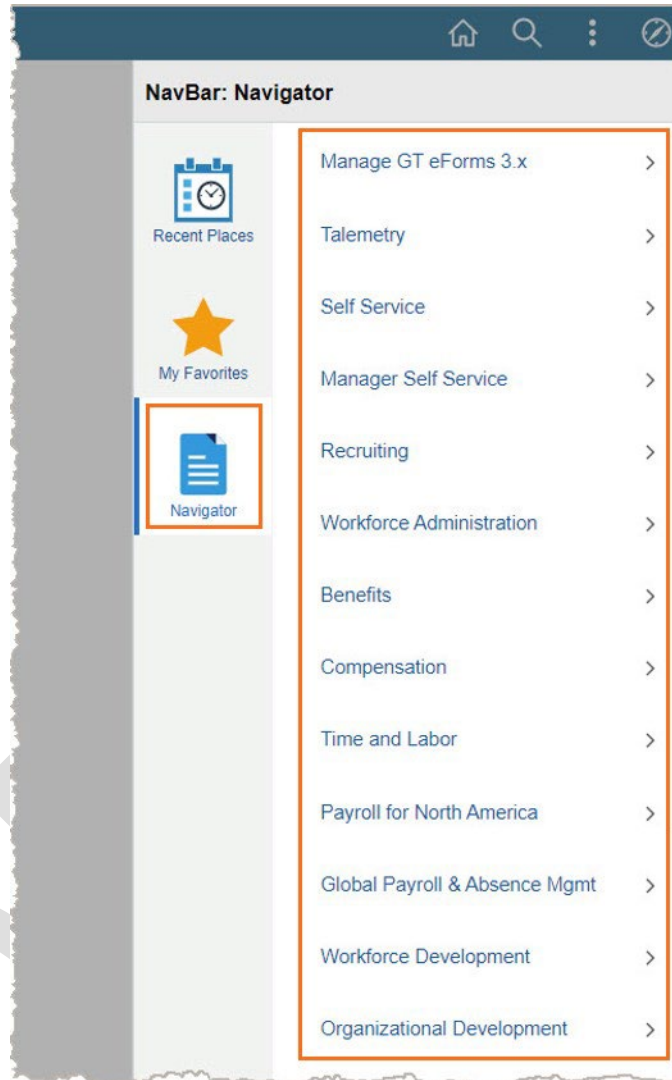
! PeopleSoft pages can only be saved as **Favorites**, they cannot be saved as **Bookmarks** on the **Dashboard**.

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

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The **Navigator** provides another way to navigate to PeopleSoft pages.

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



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

Refer to these job aids for cross-reference information:

UCPath WFA Navigation

UCPath ePerformance Navigation

UCPath TAM Navigation

UCPath PAY Navigation

UC Path AB Navigation

UC Path GL Navigation

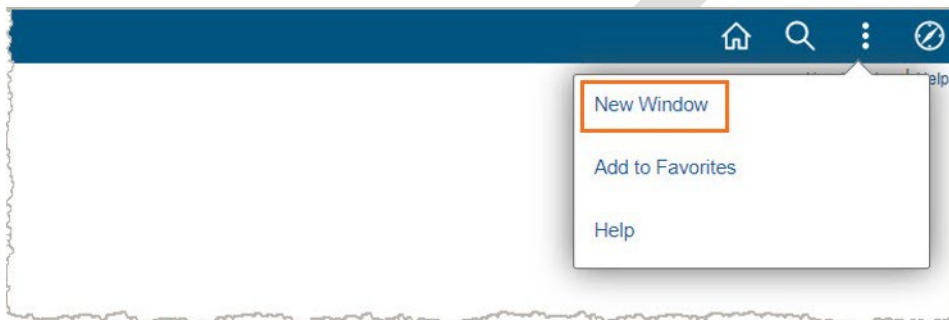
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Actions

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

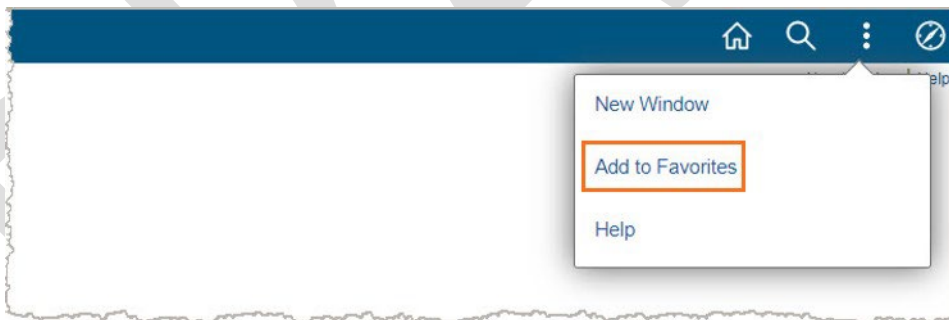


You can open a new window in a new tab using the **New Window** link.



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

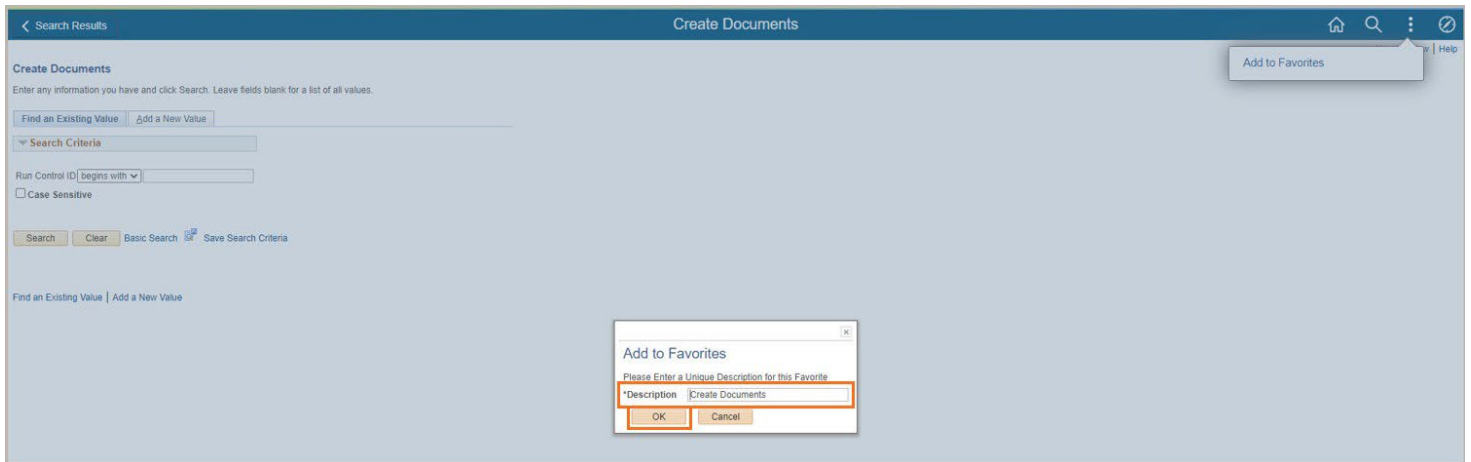
To add, click **Add to Favorites**.



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

Click **OK** to add.

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Click **OK** to confirm.



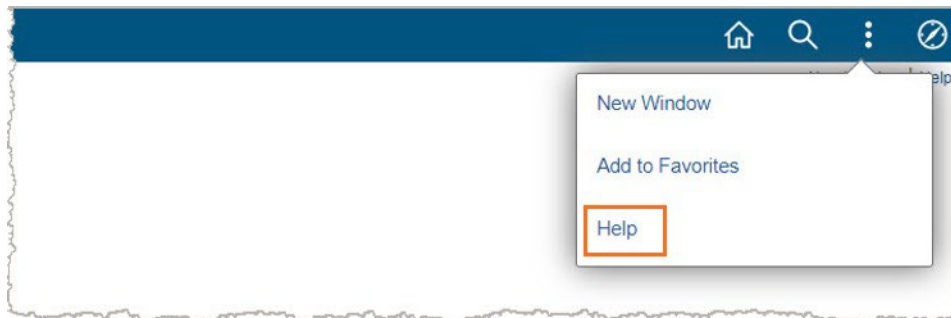
The page is now in **My Favorites**.

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 **Navigator** 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**.

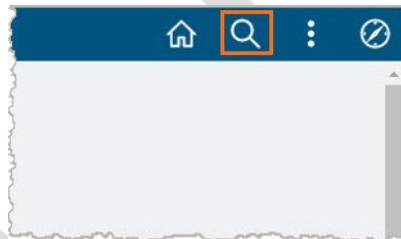
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Help will take you to the standard PeopleSoft documentation.



Global Search

Global Search looks throughout the UCPath PeopleSoft system for the page or **Navigation Collection** specified.

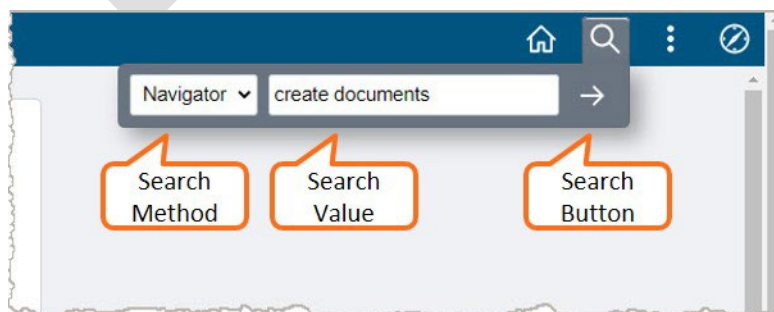


! Results are limited based on your security profile.

The default search method is **All**, but you can select **Navigator** to be more precise.

Either method provides both search filters and folder or category lists to narrow searching.

Select a search method, enter a search value and click the arrow icon to start the search.



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The search results list displays every page or **Navigation Collection** that includes any of the keywords in their **title** or **description**.

The screenshot shows the UCPath interface for "Workforce Administration" with a "Search Results" header. On the left, there is a "New Search" section and a "Folder" section with checkboxes for "Workforce Development (4)" and "Workforce Administration (1)". The main area is titled "View Search Results" and shows "5 results for keyword: 'create documents'". The results list includes:

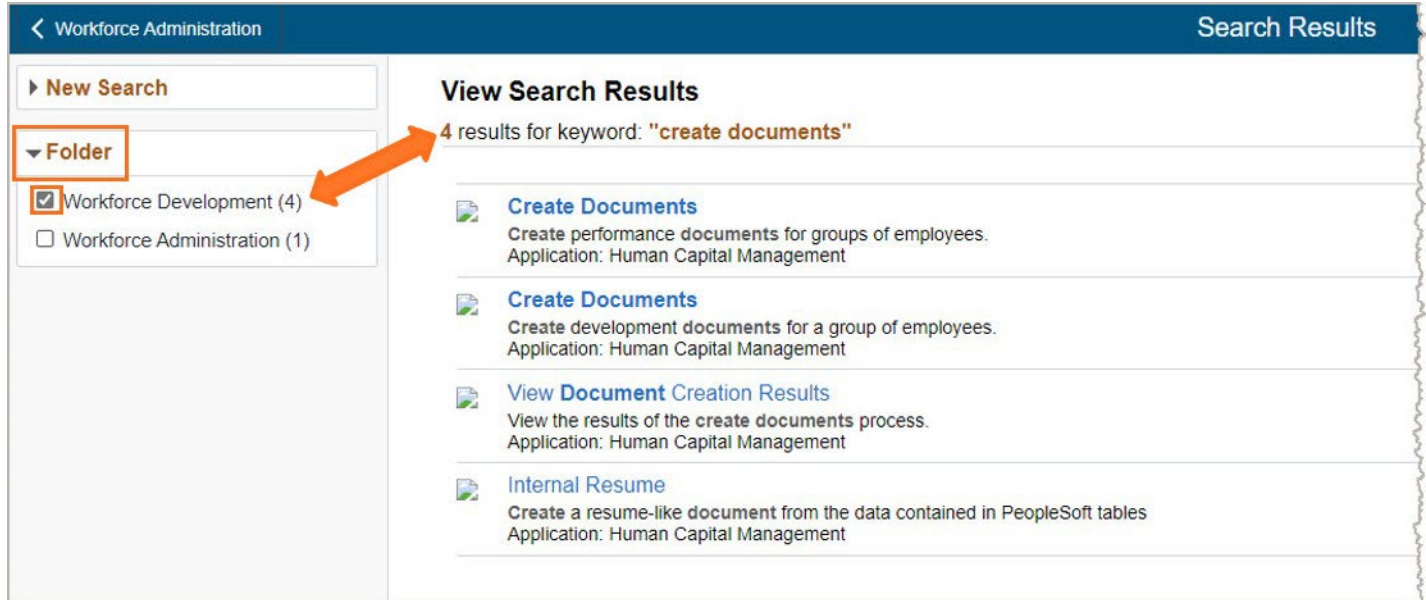
- Create Documents**: Create performance documents for groups of employees. Application: Human Capital Management. A callout box points to the title with the text "Found in title".
- Create Documents**: Create development documents for a group of employees. Application: Human Capital Management.
- View Document Creation Results**: View the results of the create documents process. Application: Human Capital Management. A callout box points to the description with the text "Found in description".
- Internal Resume**: Create a resume-like document from the data contained in PeopleSoft tables. Application: Human Capital Management.
- I-9 Receipt/Expiration Report**: Create a list of employees, within a specified date range, whose I-9 Forms are due to expire or whose final I-9 document information must be received. Application: Human Capital Management.

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.

This screenshot shows the same UCPath interface as the previous one, but with the search input fields highlighted. The "New Search" section is expanded, showing a "Category" dropdown set to "Navigator", a "Keywords" text box containing "create documents", and a "More Options" link. The "Search" button is highlighted with a red box, and the "Clear" button is also visible. The "Folder" section remains the same. The search results on the right are identical to the previous screenshot.

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



[Workforce Administration](#) Search Results

New Search

Folder

- Workforce Development (4)
- Workforce Administration (1)

View Search Results

4 results for keyword: "create documents"

- Create Documents**
Create performance documents for groups of employees.
Application: Human Capital Management
- Create Documents**
Create development documents for a group of employees.
Application: Human Capital Management
- View Document Creation Results**
View the results of the create documents process.
Application: Human Capital Management
- Internal Resume**
Create a resume-like document from the data contained in PeopleSoft tables
Application: Human Capital Management

Click on any item in the list to open it.

Home

In the upper right corner is the **Home** button. Click this button at any time to return to your default **Homepage**.



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UCPath Page Navigation Features

UCPath'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 navigation features.

The screenshot shows the UCPath interface for a user named Elliott Smith. It features a top navigation bar with links for 'New Window', 'Help', and 'Personalize Page'. Below this is a 'Workforce Job' section with a 'Go To Job Data' link. A 'Job Information' table is displayed with columns for 'Organizational Relationship', 'Empl Record', 'Effective Date', 'Seq', 'Action', 'Action Reason', 'Description', and 'Job Indicator'. The table contains five rows of data. Below the table are buttons for 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. Callouts provide instructions: 'Move across grid tabs on a page to view corresponding record details.' (pointing to the 'Job Information' tab), 'You can open a new UCPath window as necessary in the same login session.' (pointing to the top navigation bar), 'Use the right/left arrow, and the First, Last and View All links to display additional rows.' (pointing to the table's pagination controls), and 'Use these buttons to return to the search results or to view the previous or next record in the search results.' (pointing to the bottom navigation buttons).










Keyboard Shortcuts

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

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

Shortcut	Button	Action
Alt+1	Save	Save changes.
Alt+2	Return to Search	Return to search list.
Alt+3	Next in List	Display next record in list.
Alt+4	Previous in List	Display previous record in list.

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Shortcut	Button	Action
Alt+5	 or 	Display lookup values or calendar, depending on the field type.
Alt+7		Insert new row in grid.
Alt+8		Delete currently selected row in grid.
Alt+0	 Refresh	Refresh page.
Alt+.		Display next row in grid.
Alt+,		Display previous row in grid.
Alt+/'	 Find	Display the find feature for grid.
Alt+'	 View All	View all rows in the grid.