

Overview

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

Accessing UCPath

Sign into UCPath at ucpath.universityofcalifornia.edu

⚠ Note that the UCPath home page times out after 60 minutes of inactivity, while the self-service pages time out after 20 minutes of inactivity. Any unsaved data entries will be lost.

For best experience, you may wish to turn off your web browser's pop-up blocker feature. Refer to the [Enable UCPath Pop-ups](#) job ad for more information.

Always navigate with the UCPath System's buttons and menus. Do not use your web browser's forward and back buttons to navigate, as it can cause data loss.


UCPath Homepage Menu Structure

After signing in, you will land on your personalized UCPath homepage. Key navigation options are now located in the top menu bar, including tabs for **Personal Information**, **Income & Taxes**, **Benefits & Retirement**, **Accruals & Leaves**, and **Transactor Hub**. On the right, the **Workcenters** panel provides quick access to tools such as the **PeopleSoft Homepage**, **Worklist**, and **Performance Workcenter**. Your homepage also highlights essential information such as personal details, job title, and next pay date. Keep in mind that available options may vary based on your role and security permissions. This guide will focus on the most commonly used features.

The screenshot displays the UCPath homepage interface. At the top, there is a navigation bar with the UCPath logo, a search icon, and user information (LVD-Megan LVD-Abe). Below the navigation bar is a horizontal menu with tabs for Home, Personal Information, Income & Taxes, Benefits & Retirement, Accruals & Leaves, Transactor Hub, and Help. A large notification box on the left prompts the user to update their personal contact information, with a link to a tutorial video. On the right, a 'Workcenters' panel lists several options: PeopleSoft Homepage, Worklist, Performance Workcenter, Recruiting Workcenter, and View and Update eForms. Below the notification and workcenters panels, there are two main sections: 'My Information' and 'My Pay'. The 'My Information' section shows the user's name (LVD-Megan LVD-Abe), job title (TRAINER 3 (004163)), and pronouns (Not On File). The 'My Pay' section shows the next scheduled pay date as August 01. At the bottom right, there is a 'View Paycheck' button and a chat icon indicating 'No Agents Available'.

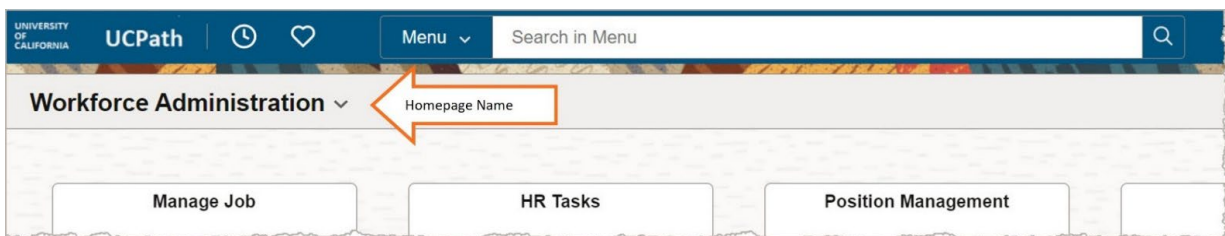
Navigation:

To access PeopleSoft from the UCPATH Homepage, use either of the following options:

- **Option 1:** Select the **PeopleSoft home icon**  located in the upper right corner of the screen.
- **Option 2:** In the **Workcenters** tab on the right side of the Homepage, select **PeopleSoft Homepage**.

PeopleSoft Homepage Menu Structure

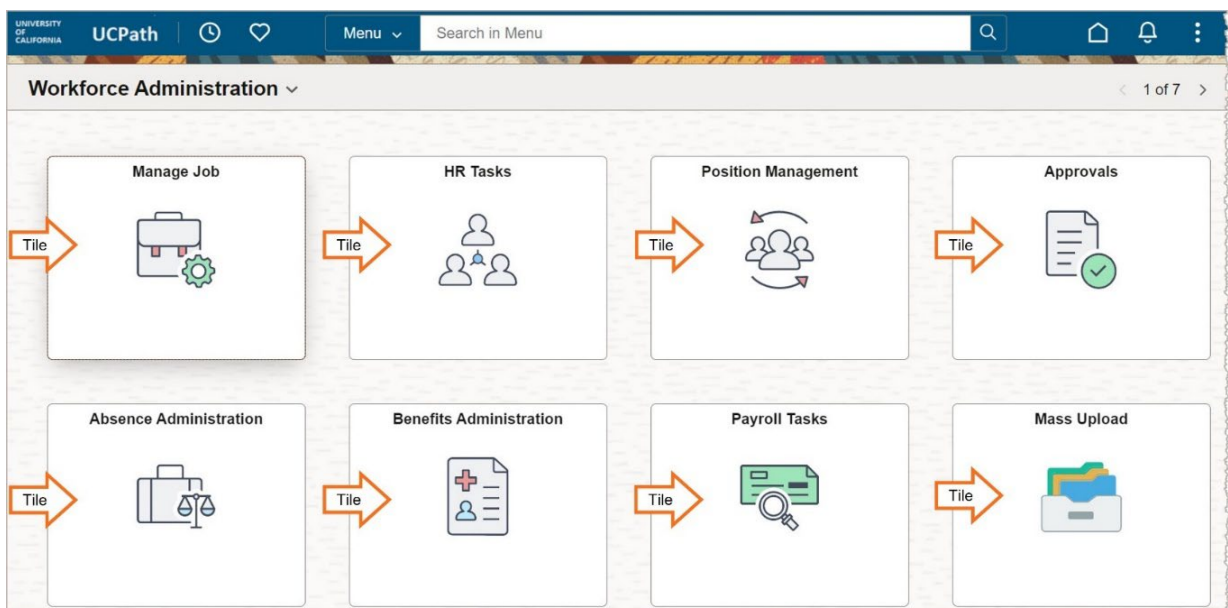
The **PeopleSoft Homepage** features out-of-box solutions from Oracle Peoplesoft. This includes various Homepage views and boxes known as 'Tiles', which are explained below.



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.

! When you open **UCPATH PeopleSoft**, close the UCPATH portal window. This disconnects the relationship between the UCPATH portal and PeopleSoft and prevents session timeout. If a pop-up message appears on a Peoplesoft window stating "Your session is about to expire," click the "OK" button to prevent PeopleSoft from timing out.

Tiles are standardized collections of business processes logically grouped together by Oracle. They provide a quick and easy way to navigate to the pages or pages that you need. Your specific security permissions determine which **Homepages** and **Tiles** have access to.



Navigation Collections

Selecting a **Tile** opens a new page. 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. Again, your specific security roles determine which pages and folders you will see and have access to.

The screenshot displays the UCPath interface. At the top, there is a navigation bar with a back arrow, a clock icon, a heart icon, and a search bar labeled "Search in Menu". Below the navigation bar, the interface is divided into two main sections. On the left, there is a sidebar titled "HR Tasks" containing a list of folders and pages: "Search Person", "Person Organizational Summary", "Contract Pay", "PayPath/Additional Pay", "Job Data Related", "Personal Data Related", "Reports/Processes", "Smart HR Templates", and "Security Provisioning". On the right, the main content area is titled "Search/Match" and contains a section for "Find an Existing Value". This section includes a "Search Criteria" dropdown, a text input field for search criteria, and a "Search" button. Below the search criteria, there are options for "Search Type", "Search Parameter", and "Description", each with a dropdown menu and a text input field. There are also "Ad Hoc Search" and "Show fewer options" options. The interface is annotated with orange arrows and boxes: one arrow points to the "HR Tasks" sidebar with the label "Navigation Collection", and another arrow points to the "Search/Match" section with the label "Default page".

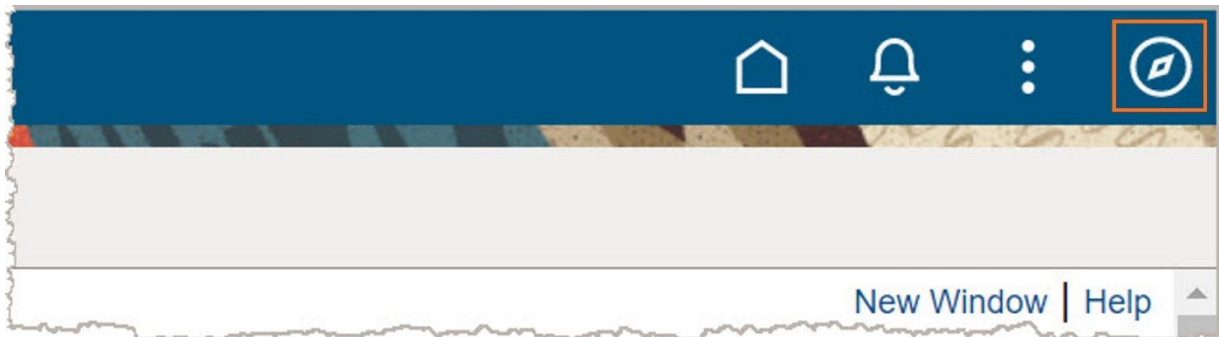
▲ Refer to these training resources for information on searching for UCPath data and information:

[UCPath Search Options](#)

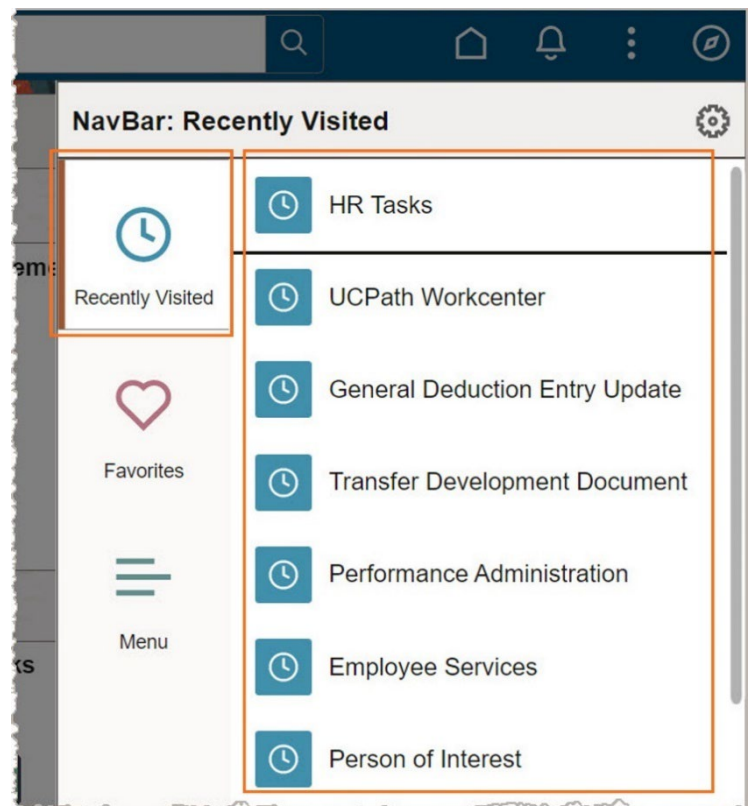
[Using Search Pages](#)


Navigation Bar

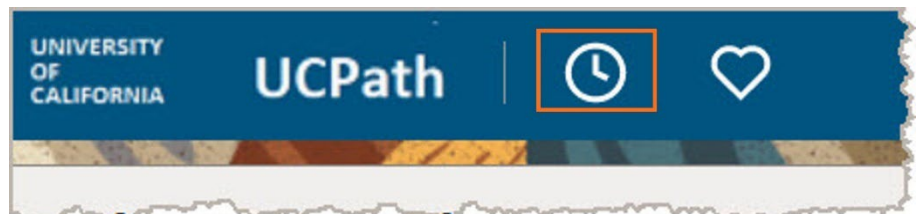
In the upper right corner is the **Navigation Bar**, which gives you access to several navigation tools.



The first is the “NavBar: Recently Visited” menu which lists pages you have navigated to. Select any of these to jump to that page.

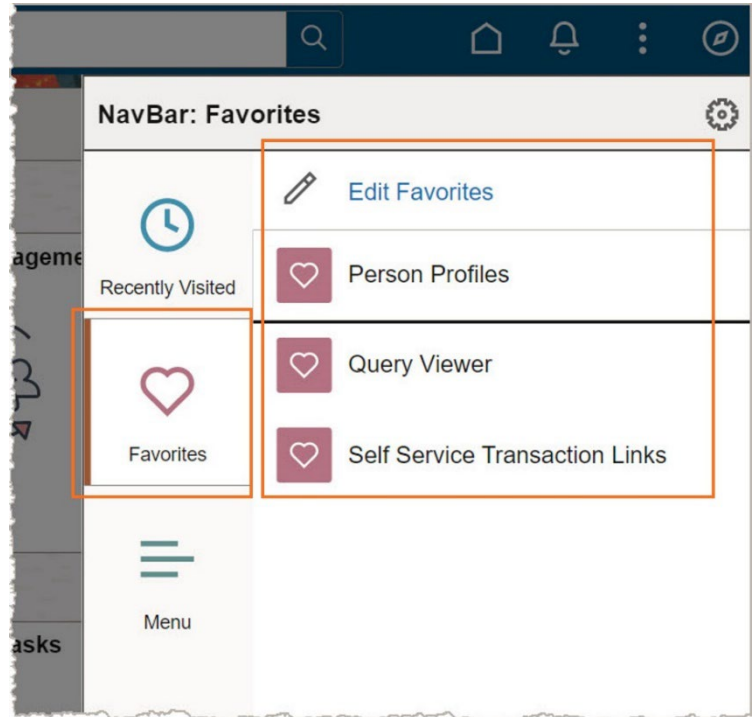


You can also access the last ten pages visited in the same **Recently Visited** list from the Quick Access bar found to the left, by clicking on the clock icon .




The heart icon **Favorites** gives you access to any of your saved items and allows you to edit them.

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



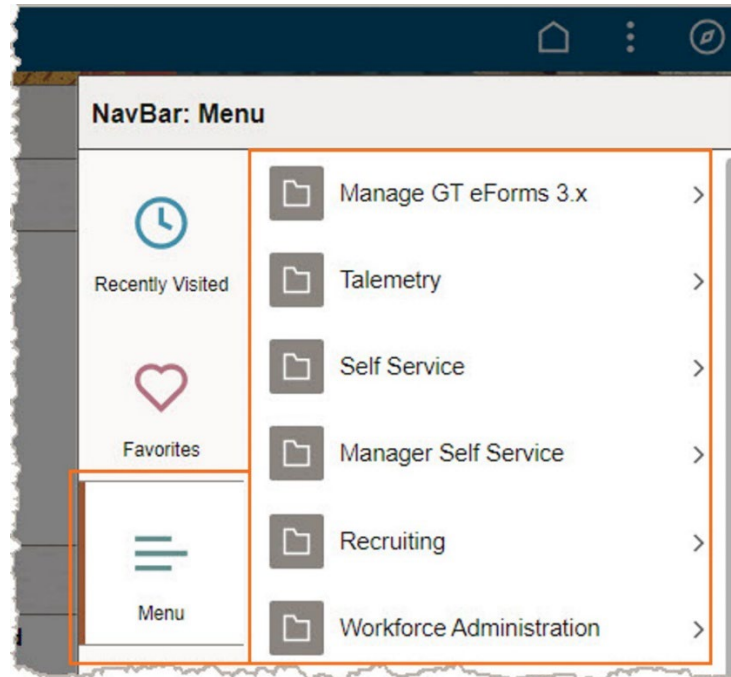
⚠ PeopleSoft pages can only be saved as **Favorites**, they cannot be saved as **Bookmarks** on the Homepage.

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

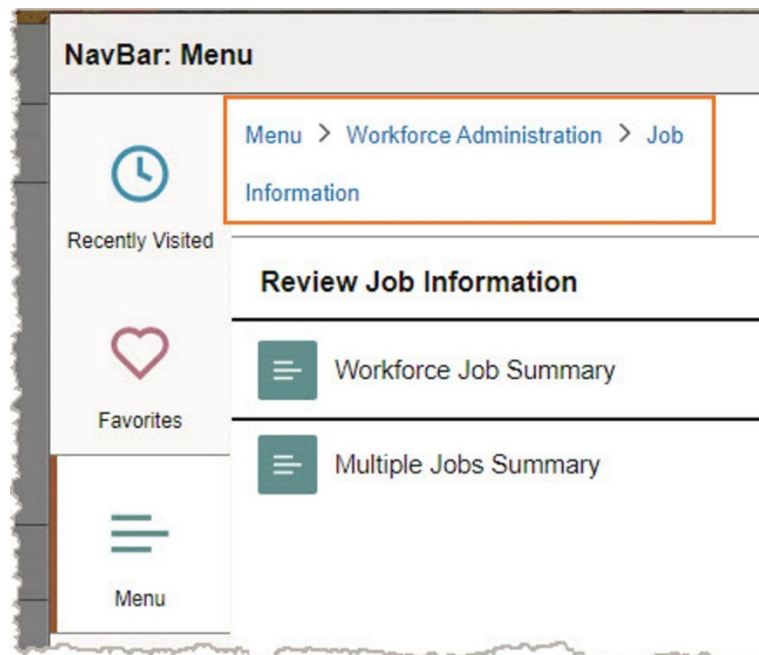
To add a Favorite, see the **Actions** section below.



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). A “breadcrumb path” is built as selections are 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](#)

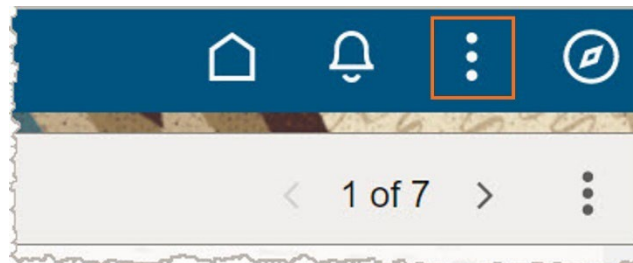
[UCPath PAY Navigation](#)

[UCPath TAM Navigation](#)

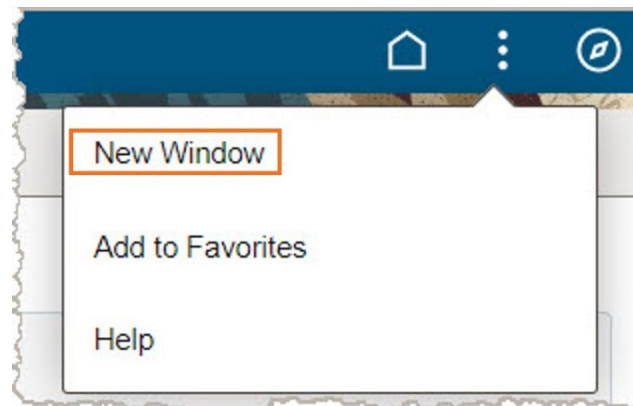
[UCPath WFA Navigation](#)

Actions

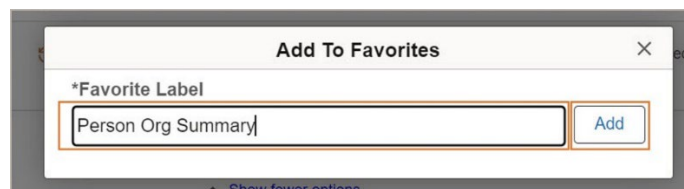
The **Actions** button gives you access to several useful options.



You can open a new window in a new tab using the **New Window** link and **Add to Favorites**, if you choose.



When you **Add to Favorites**, you are able to add descriptive text to the defaulted name in **Description**, but never remove the name of the page.



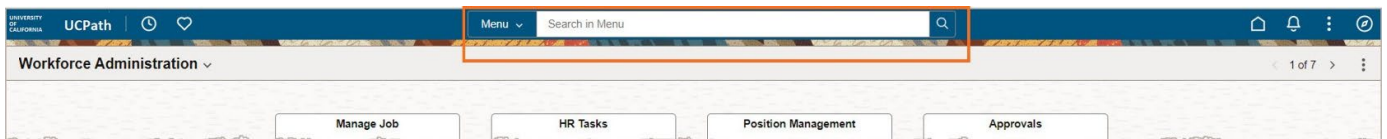
⚠ How you navigate to a page or **Navigation Collection** determines what you'll be able to save as a **Favorite**.

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**.

Global Search

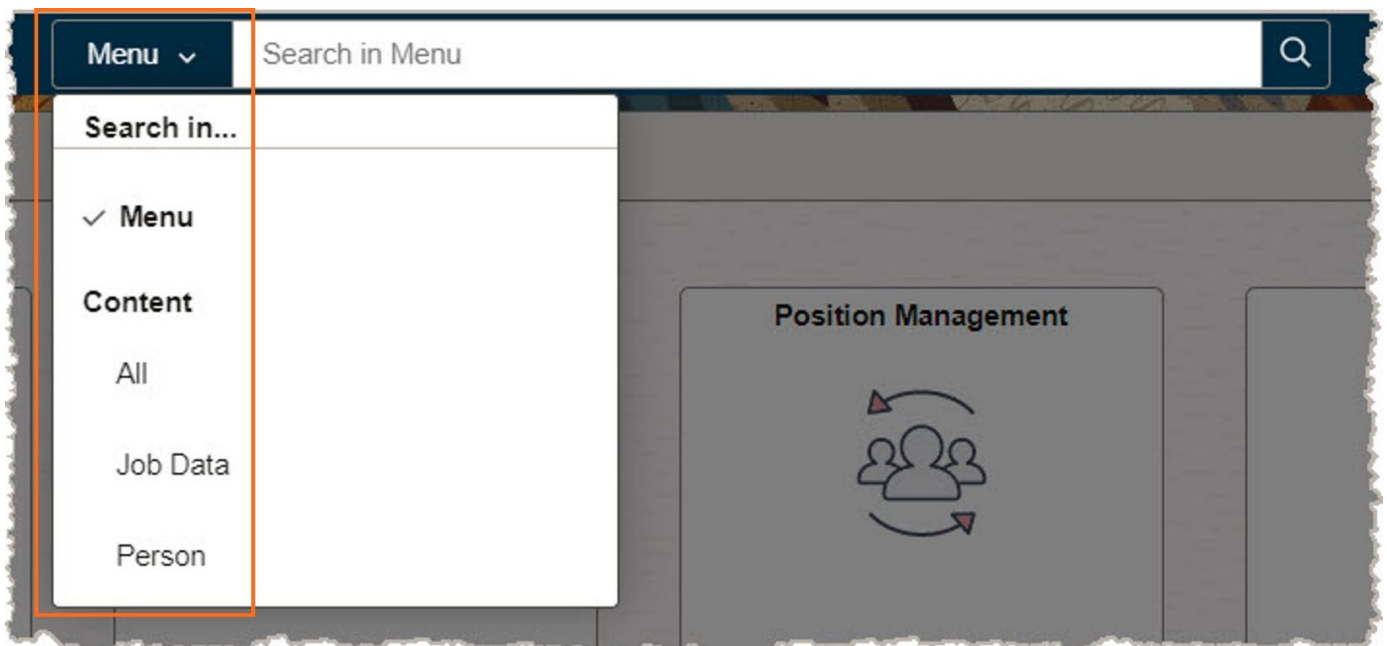
Search in Menu can be used to look throughout the UCPath PeopleSoft System to find the page, **Navigation Collection**, job data or specific person needed to process UCPath data.



⚠ Results are limited based on your security profile.

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

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



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

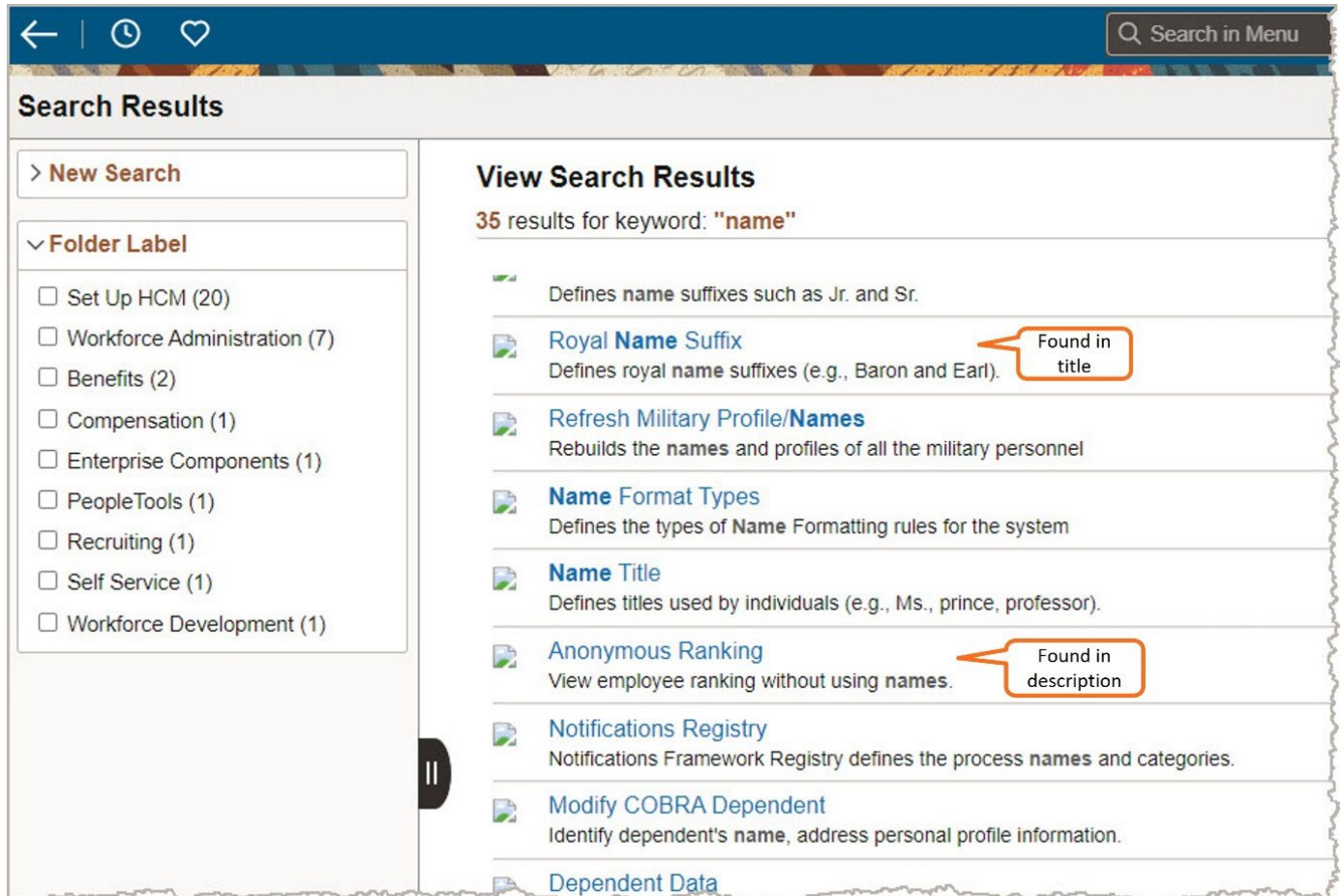
Job Data will search for matching job data.

Person looks for matching employee data.

To narrow your search, select a search method, enter a search value, and click the magnifying glass 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**.



Search Results

> **New Search**

▼ **Folder Label**

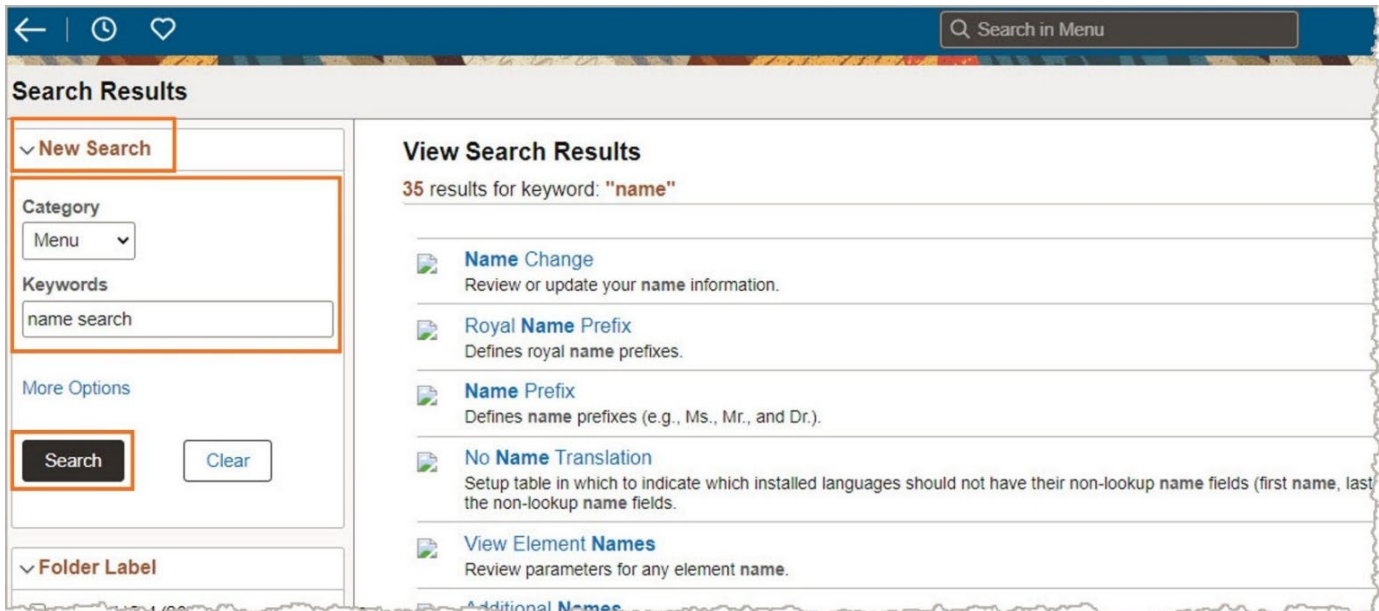
- Set Up HCM (20)
- Workforce Administration (7)
- Benefits (2)
- Compensation (1)
- Enterprise Components (1)
- PeopleTools (1)
- Recruiting (1)
- Self Service (1)
- Workforce Development (1)

View Search Results

35 results for keyword: "name"

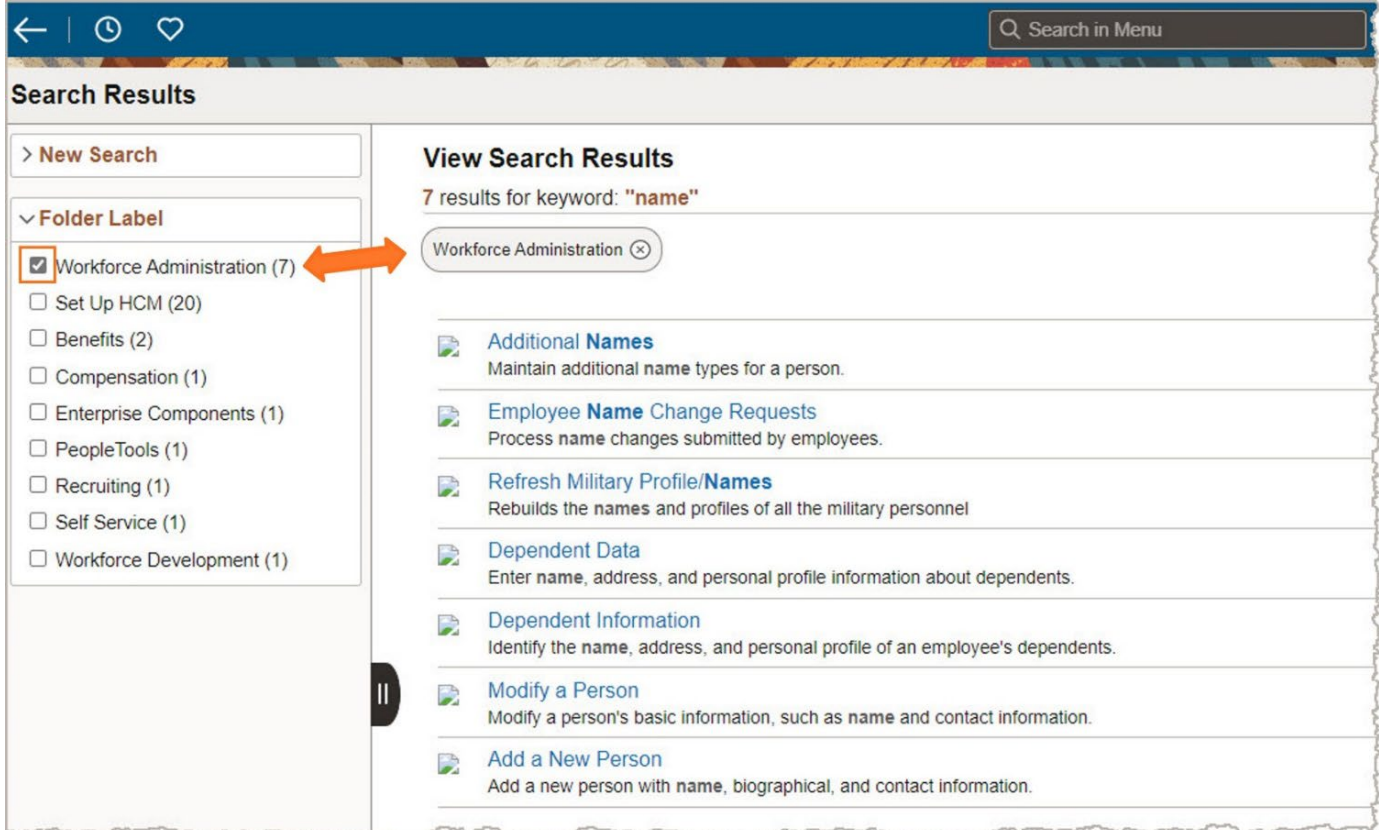
- Defines name suffixes such as Jr. and Sr.
- Royal Name Suffix** (Found in title)
Defines royal name suffixes (e.g., Baron and Earl).
- Refresh Military Profile/Names**
Rebuilds the names and profiles of all the military personnel
- Name Format Types**
Defines the types of Name Formatting rules for the system
- Name Title**
Defines titles used by individuals (e.g., Ms., prince, professor).
- Anonymous Ranking** (Found in description)
View employee ranking without using names.
- Notifications Registry**
Notifications Framework Registry defines the process names and categories.
- Modify COBRA Dependent**
Identify dependent's name, address personal profile information.
- Dependent Data**

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



The screenshot shows the UCPath search interface. On the left, the 'New Search' section is highlighted with an orange border. It includes a 'Category' dropdown set to 'Menu', a 'Keywords' input field containing 'name search', and a 'Search' button. Below this is a 'Folder Label' section. On the right, the 'View Search Results' section shows 35 results for the keyword 'name'. The results list includes: 'Name Change' (Review or update your name information), 'Royal Name Prefix' (Defines royal name prefixes), 'Name Prefix' (Defines name prefixes (e.g., Ms., Mr., and Dr.)), 'No Name Translation' (Setup table in which to indicate which installed languages should not have their non-lookup name fields (first name, last the non-lookup name fields)), and 'View Element Names' (Review parameters for any element name).

The **Folder Label** section lists all the topic folders within the UCPath System where the search keywords are found. Click the checkboxes to narrow the search results list for a more accurate selection. Select any item in the list to open it.



The screenshot shows the UCPath search interface with the 'Folder Label' section expanded. The 'Workforce Administration (7)' checkbox is checked and highlighted by an orange arrow. The 'View Search Results' section shows 7 results for the keyword 'name'. The results list includes: 'Additional Names' (Maintain additional name types for a person), 'Employee Name Change Requests' (Process name changes submitted by employees), 'Refresh Military Profile/Names' (Rebuilds the names and profiles of all the military personnel), 'Dependent Data' (Enter name, address, and personal profile information about dependents), 'Dependent Information' (Identify the name, address, and personal profile of an employee's dependents), 'Modify a Person' (Modify a person's basic information, such as name and contact information), and 'Add a New Person' (Add a new person with name, biographical, and contact information).

Back

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

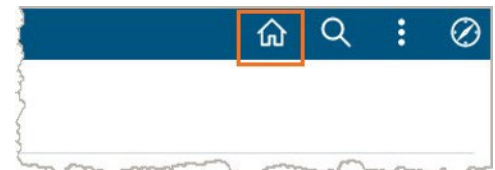
Use this button to navigate back to a **PeopleSoft** page, **Homepage**, or **Navigation Collection** per the label displayed.



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

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.

New Window | Help | Personalize Page |

Workforce Job
Elliott Smith EMP
 Empl Status Active Hire Date 07/13/1981
 [Go To Job Data]

Move across **grid tabs** on a page to view corresponding record details.

You can open a **new UCPath window** as necessary in the same login session.

Use the right/left arrow, and the **First, Last and View All** links to display additional rows.

Use these buttons to return to the search results or to view the previous or next record in the search results.

Personalize | Find | | First 1-5 of 5 Last














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

Return to Search Previous in List Next in List Notify

Keyboard Shortcuts






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

▲ 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	Save changes.
Alt+2	 Return to Search	Return to search list.
Alt+3	 Next in List	Display the next record in the list.
Alt+4	 Previous in List	Display the previous record in the list.
Alt+5	 or 	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	Refresh page.
Alt+.		Display the next row in the grid.
Alt+,		Display the previous row in the grid.
Alt+/ Alt+'	 Find	Display the find feature for the grid.
Alt+'	 View All	View all rows in the grid.

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 .