

Job Aid: UCPath Basics and Navigation

Overview

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

Contents

Overview	1
Accessing UCPath	2
UCPath Dashboard Menu Structure	3
PeopleSoft Homepage Menu Structure	4
Navigation Collections	5
Navigation Bar	6
Actions	10
Global Search	11
Back	14
Home	14
UCPath Page Navigation Features	15
Keyboard Shortcuts	16
Icons Legend	17

Job Aid: UCPath Basics and Navigation

Accessing UCPath

Sign into UCPath at ucpath.universityofcalifornia.edu

 Note that the UCPath dashboard 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.

- **Important:** For best experience, you may wish to turn off your web browser's pop-up blocker feature.

 Refer to the [UCPath Disable Pop-Up Blocker](#) job aid 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.

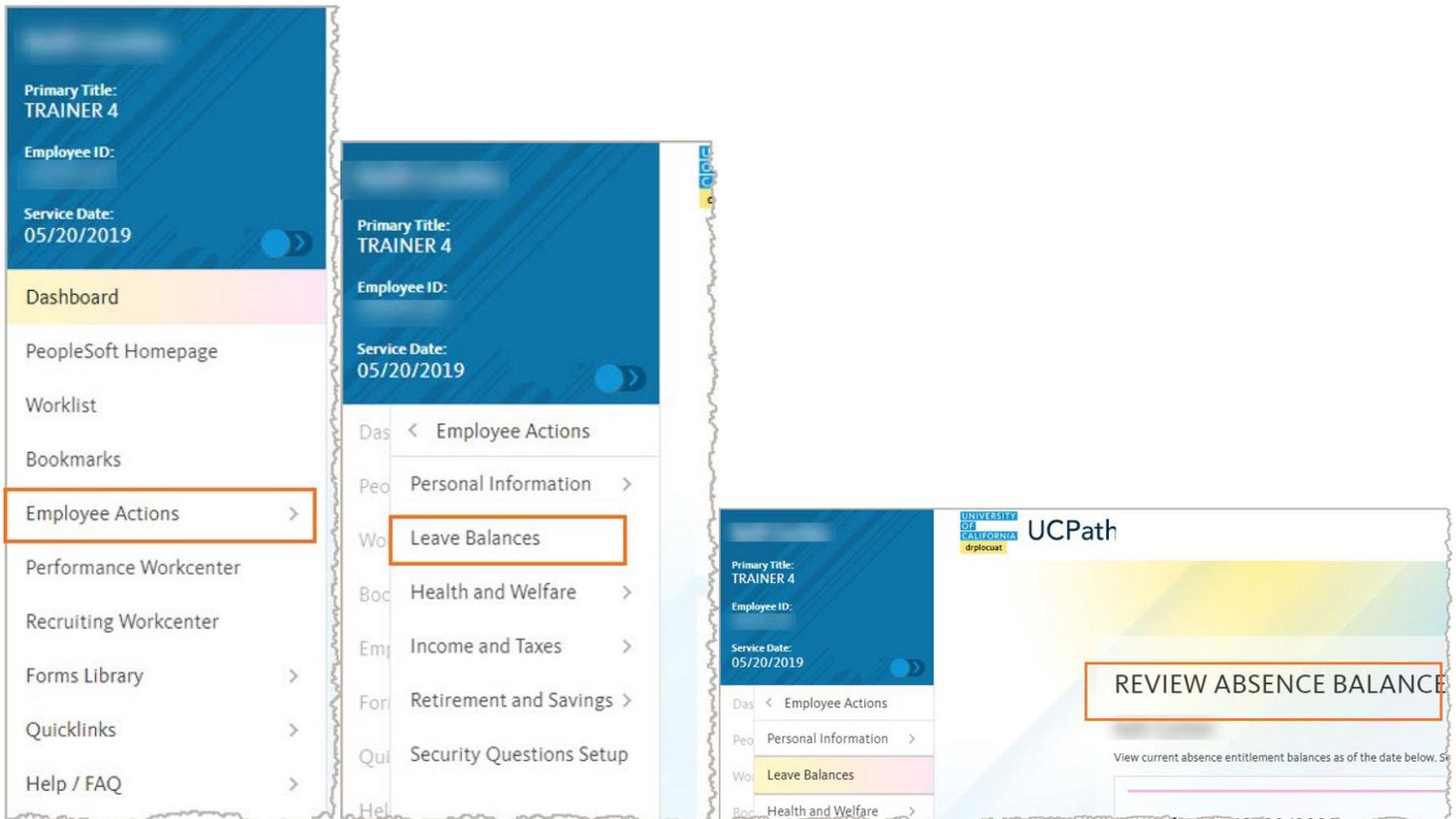
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UCPath Dashboard Menu Structure

After signing in you will find yourself on your personal Dashboard. Start by understanding the left-hand menu, which includes **Dashboard, PeopleSoft Homepage, Worklist, Bookmarks, Employee Actions, Help / FAQ**, among other standard options. Your menu may differ depending on security permissions, because of that we'll cover just a few of the more common menu items in this guide.

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 left-hand menu includes

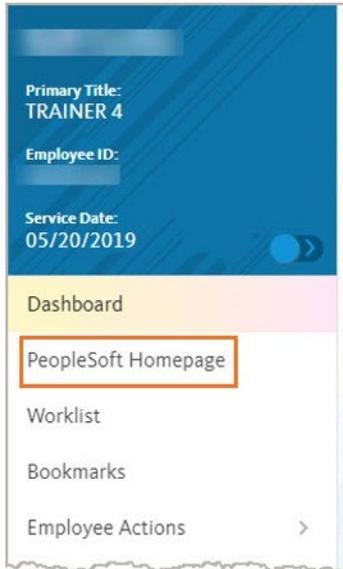
From the left-hand menu, you can drill down into certain menu items to find pages and components for the tasks you perform in the UCPath System (for example, drilling down to the Review Absence Balance page).



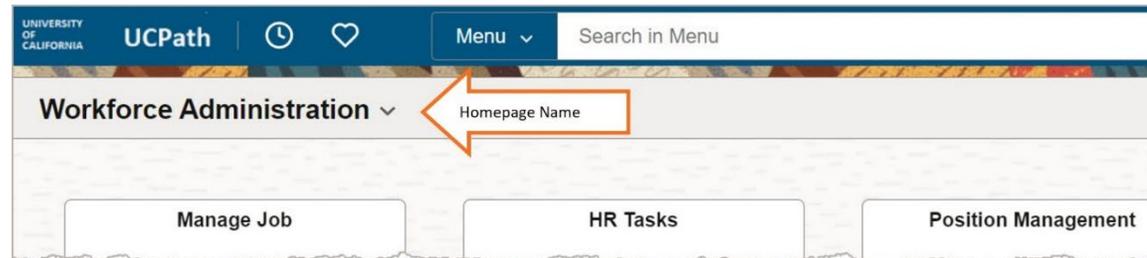
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PeopleSoft Homepage Menu Structure

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.

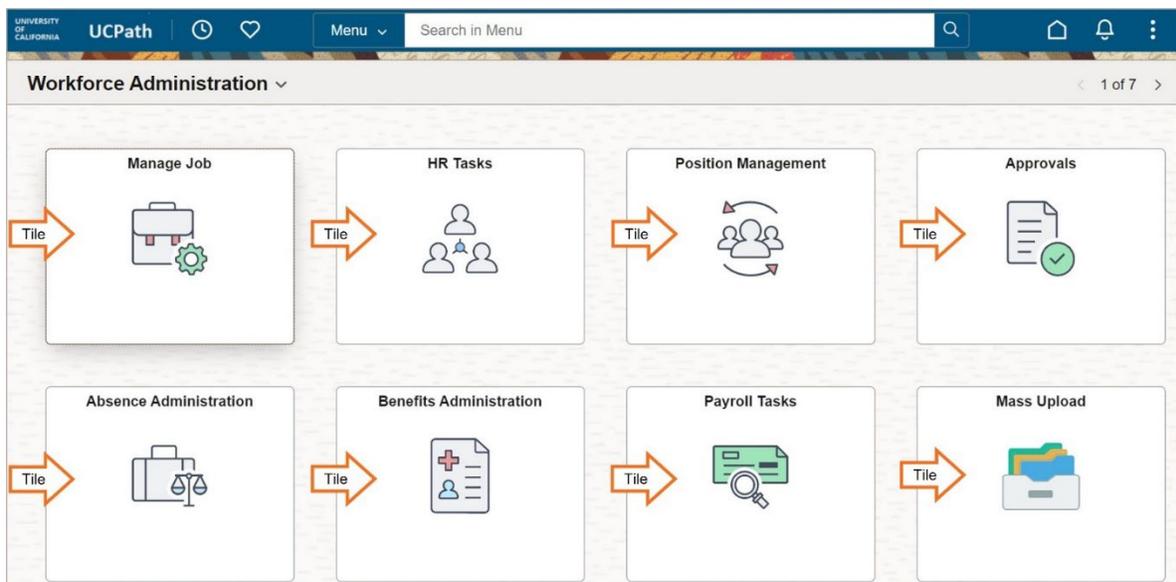


You may have access to more than one **Homepage**. To access the other **Homepages** available to you, click on the dropdown arrow positioned next to the **Homepage** name and select from the list.



! 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.

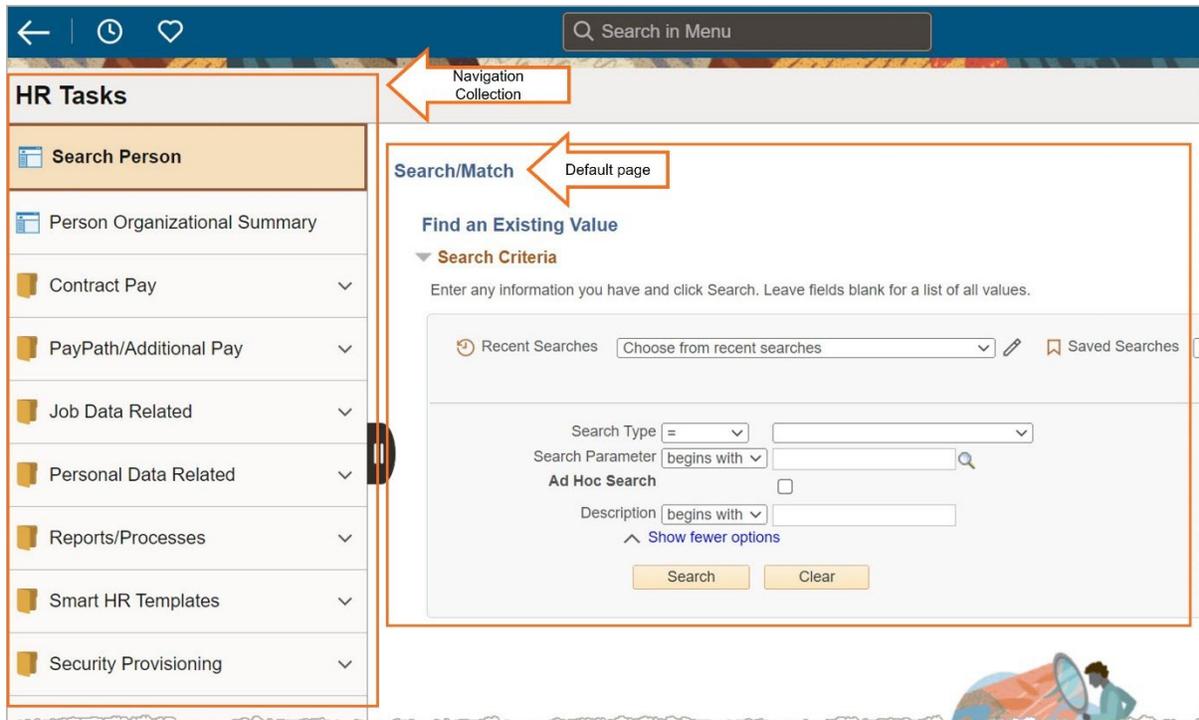


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Navigation Collections

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.



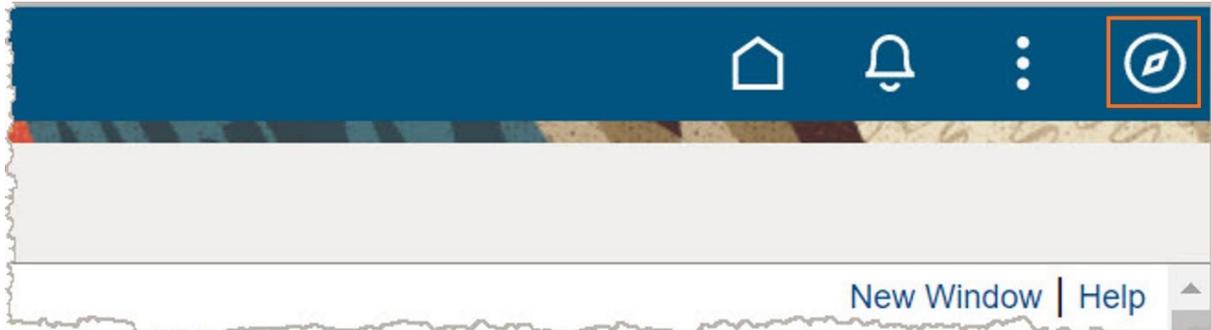
- ⚠ Refer to these training resources for information on searching for UCPath data and information:

[UCPath Search Options](#)
[Using Search Pages](#)

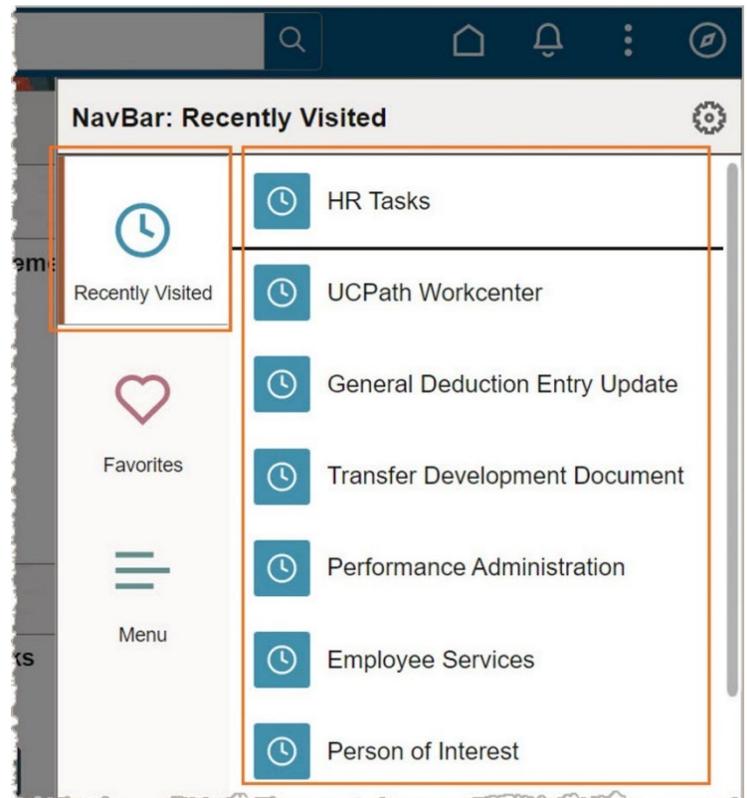
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Navigation Bar

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

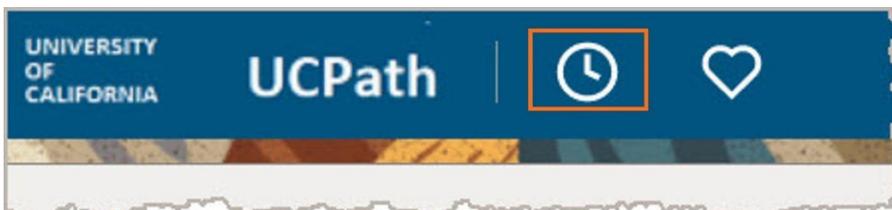


The first is the **“NavBar: Recently Visited”** menu which lists pages you have navigated to. Select any of these to jump to that page.



You can also access the last ten pages visited in the same **Recently Visited** list from the Quick

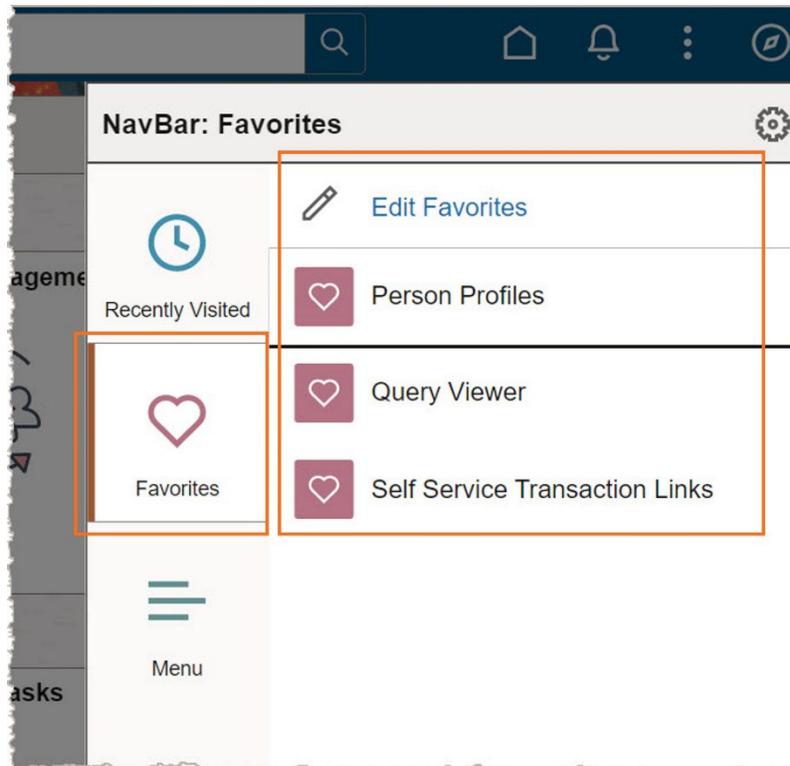
Access bar found to the left, by clicking on the clock icon .



Job Aid: UCPath Basics and Navigation

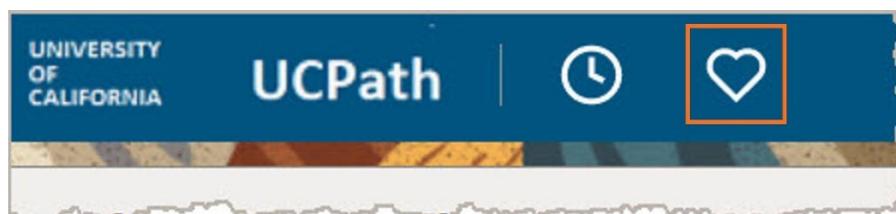
The heart icon **Favorites** gives you access to any of your saved items and allows you to edit them.

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 **Dashboard**.

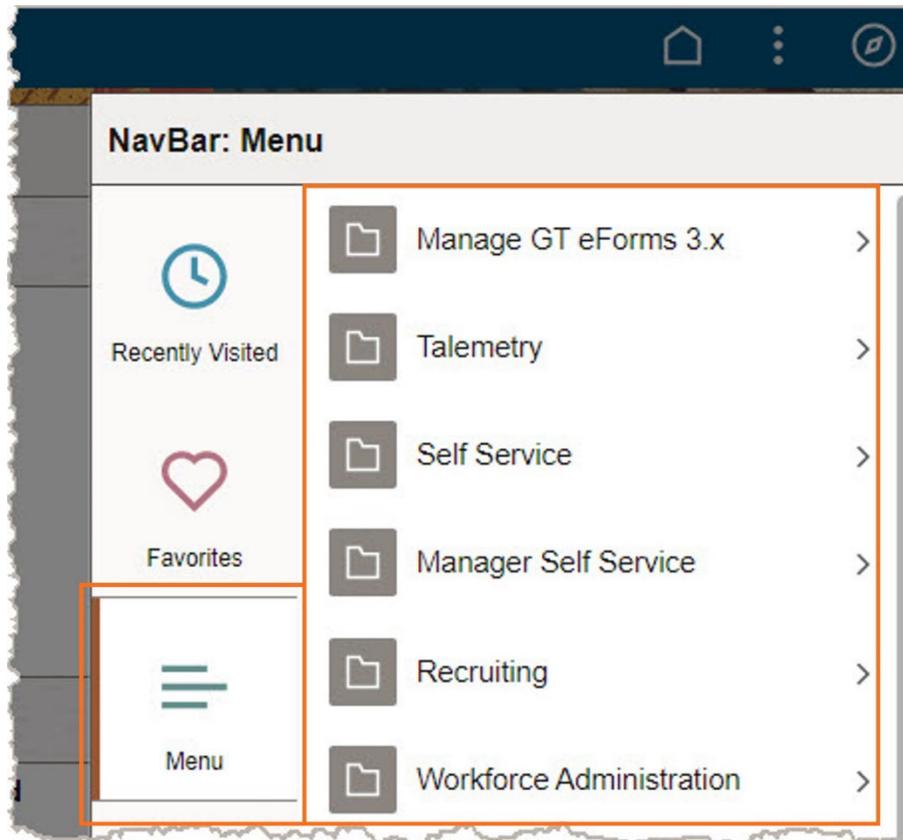
You can also access the same **Favorites** list from the Quick Access bar found to the left, by clicking on the heart icon .



Job Aid: UCPath Basics and Navigation

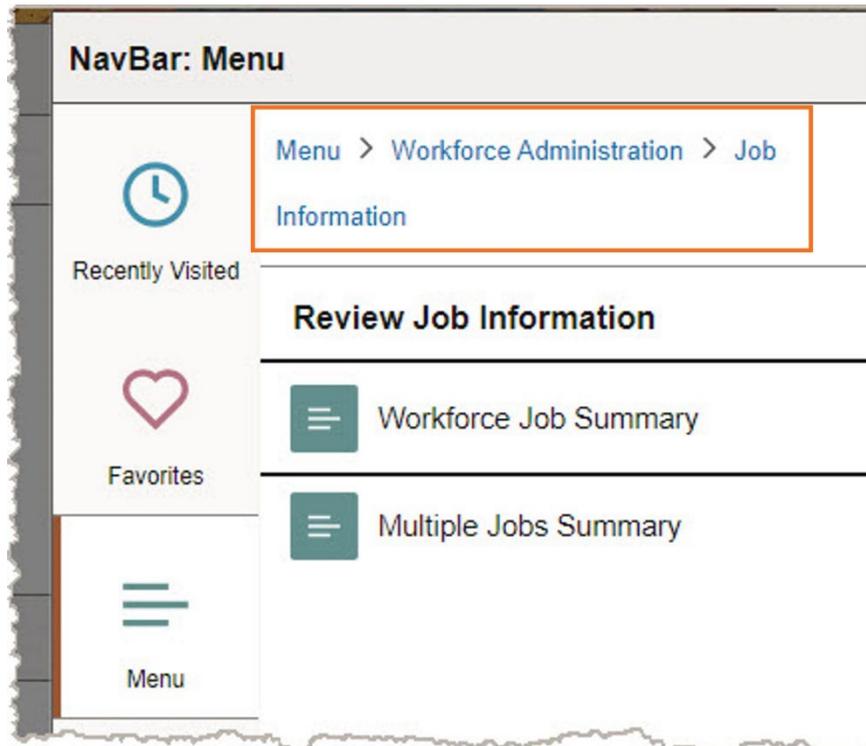
To add a Favorite, see the [Actions](#) section below.

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).

Job Aid: UCPath Basics and Navigation



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](#)

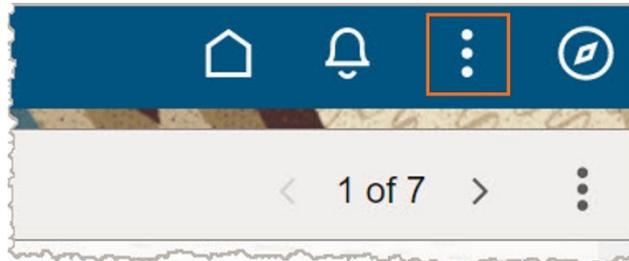
[UCPath TAM Navigation](#)

[UCPath WFA Navigation](#)

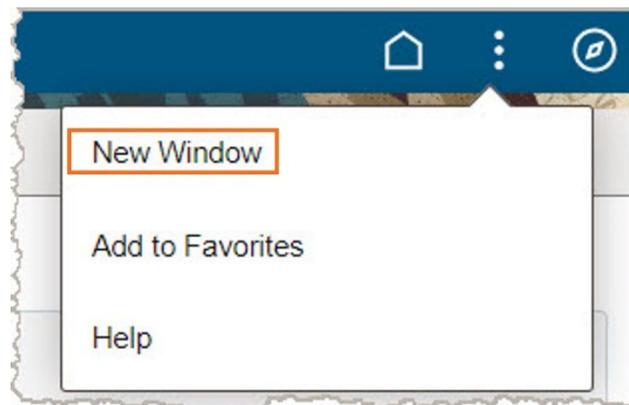
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Actions

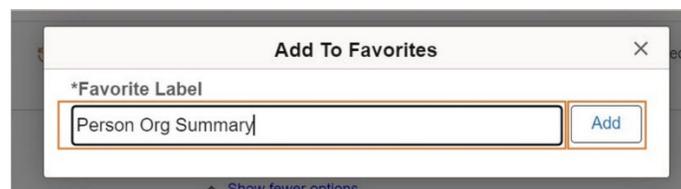
The **Actions** button gives you access to several useful options.



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



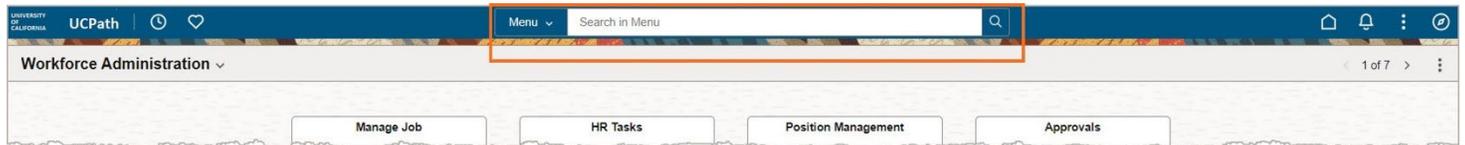
⚠ How you navigate to a page or **Navigation Collection** determines what you'll be able to save as a **Favorite**.

- 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**.

Job Aid: UCPath Basics and Navigation

Global Search

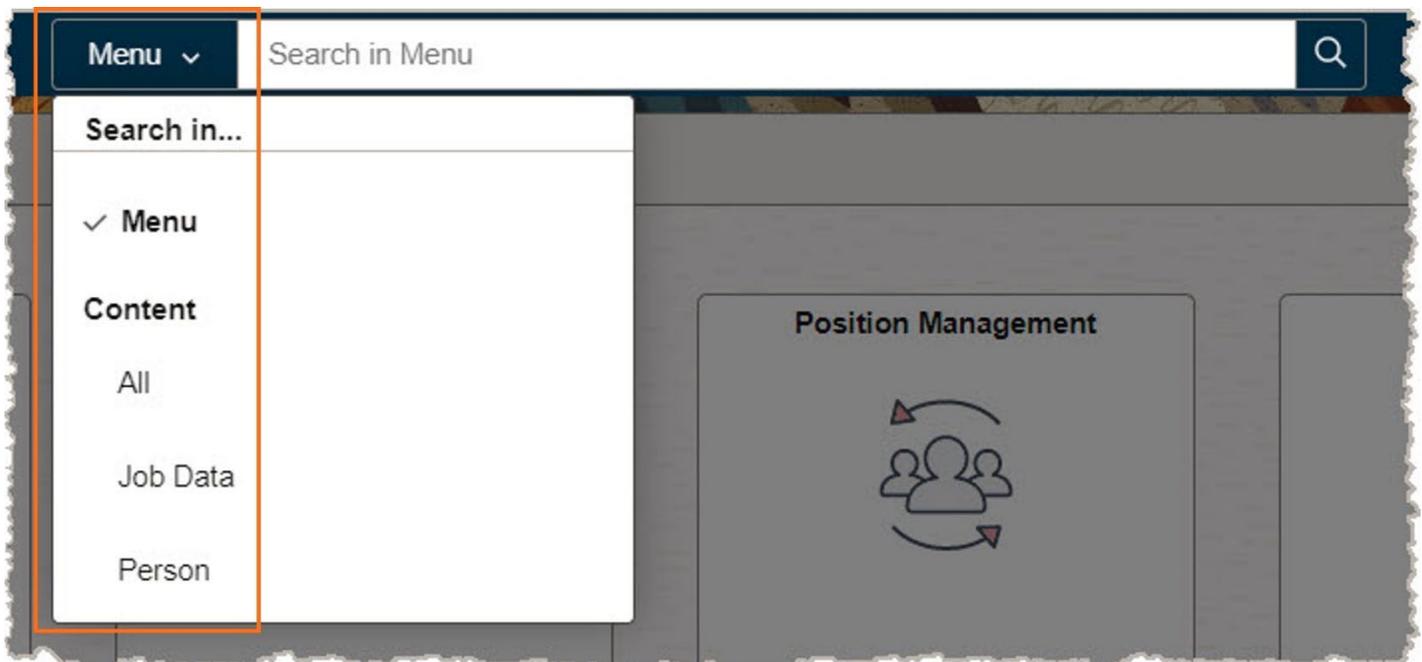
Search in Menu can be used to look throughout the UCPath PeopleSoft System to find the page, **Navigation Collection**, job data or specific person needed to process UCPath data.



⚠ 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.

Job Aid: UCPath Basics and Navigation

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**.

A screenshot of the UCPath search results page. The page has a blue header with navigation icons (back, home, heart) and a search box labeled "Search in Menu". Below the header, the page is titled "Search Results". On the left side, there is a "New Search" section and a "Folder Label" section with a list of checkboxes and counts: Set Up HCM (20), Workforce Administration (7), Benefits (2), Compensation (1), Enterprise Components (1), PeopleTools (1), Recruiting (1), Self Service (1), and Workforce Development (1). The main content area is titled "View Search Results" and shows "35 results for keyword: 'name'". A list of search results is displayed, each with a document icon, a title, and a description. Two results are highlighted with orange callouts: "Royal Name Suffix" with the callout "Found in title" pointing to the title, and "Anonymous Ranking" with the callout "Found in description" pointing to the description. Other results include "Refresh Military Profile/Names", "Name Format Types", "Name Title", "Notifications Registry", "Modify COBRA Dependent", and "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.

Job Aid: UCPath Basics and Navigation

The screenshot shows the UCPath search interface. At the top, there are navigation icons (back, refresh, heart) and a search bar labeled "Search in Menu". Below this is the "Search Results" section. On the left, there is a search filter panel with a "New Search" button, a "Category" dropdown set to "Menu", a "Keywords" input field containing "name search", and a "Search" button. Below the search panel is a "Folder Label" section with a dropdown arrow. On the right, the "View Search Results" section shows "35 results for 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.

This screenshot shows the same UCPath search interface as the previous one, but with the "Folder Label" section expanded. The "Folder Label" section now lists several categories with checkboxes: "Workforce Administration (7)" (checked), "Set Up HCM (20)", "Benefits (2)", "Compensation (1)", "Enterprise Components (1)", "PeopleTools (1)", "Recruiting (1)", "Self Service (1)", and "Workforce Development (1)". An orange arrow points from the checked "Workforce Administration (7)" checkbox to the "View Search Results" section. The "View Search Results" section now shows "7 results for keyword: 'name'". The results list includes: "Workforce Administration" (with a close button), "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.).

Job Aid: UCPath Basics and Navigation

Back

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

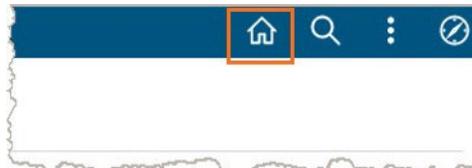


Use this button to navigate back to a **PeopleSoft** page, **Homepage**, or **Navigation Collection** per the label displayed.

! 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**.



Job Aid: UCPath Basics and Navigation

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.

The screenshot displays the UCPath interface for a user named Elliott Smith. The interface includes a top navigation bar with links for 'New Window', 'Help', and 'Personalize Page'. Below this, the user's name and status are shown, along with a 'Go To Job Data' link. The main content area features a 'Job Information' section with a table of employment records. The table has columns for 'Organizational Relationship', 'Empl Record', 'Effective Date', 'Seq', 'Action', 'Action Reason', 'Description', and 'Job Indicator'. Below the table are navigation buttons: 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. Callouts provide instructions on how to use these features.

Callout 1: Move across **grid tabs** on a page to view corresponding record details.

Callout 2: You can open a **new UCPath window** as necessary in the same login session.

Callout 3: Use the right/left arrow, and the **First, Last** and **View All** links to display additional rows.

Callout 4: Use these buttons to return to the search results or to view the previous or next record in the search results.

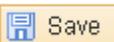
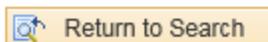
Organizational Relationship	Empl Record	Effective Date	Seq	Action	Action Reason	Description	Job Indicator
EMP	0	04/12/2016	0	Data Chg	CNV	CONV: Conversion row	Primary
EMP	0	11/01/2015	0	Data Chg	CNV	CONV: Conversion row	Primary
EMP	0	07/01/2015	0	Pay Rt Chg	ATB	Across-The-Board	Primary
EMP	0	07/13/1981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

Job Aid: UCPath Basics and Navigation

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+/'	 Find	Display the find feature for the grid.
Alt+'	 View All	View all rows in the grid.

Job Aid: UCPath Basics and Navigation

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 .