



Office of Information  
Technology  
KNOWLEDGE SERVICES

## UTShare Navigation Training Guide

# Table of Contents

- UTShare Navigation Training Guide ..... 1**
- Navigating Overview ..... 1**
- Log in to UTShare ..... 1**
- Navigating to a Functional Page ..... 3**
  - Tiles on Homepages ..... 3
  - NavBar Menu ..... 4
- Universal Navigation Elements ..... 5**
  - Homepage Navigation ..... 5
  - Home Button ..... 6
  - Global Search ..... 6
  - Notifications ..... 6
  - Actions ..... 7
    - Actions from the Homepage ..... 7
      - Personalize Homepage ..... 8
    - Actions from a Functional Page ..... 9
      - Add to Homepage ..... 9
      - Add to NavBar ..... 9
  - NavBar ..... 10
    - Personalize NavBar ..... 10
  - Favorites ..... 11
    - Adding a Page to Favorites ..... 11

## Navigating Overview

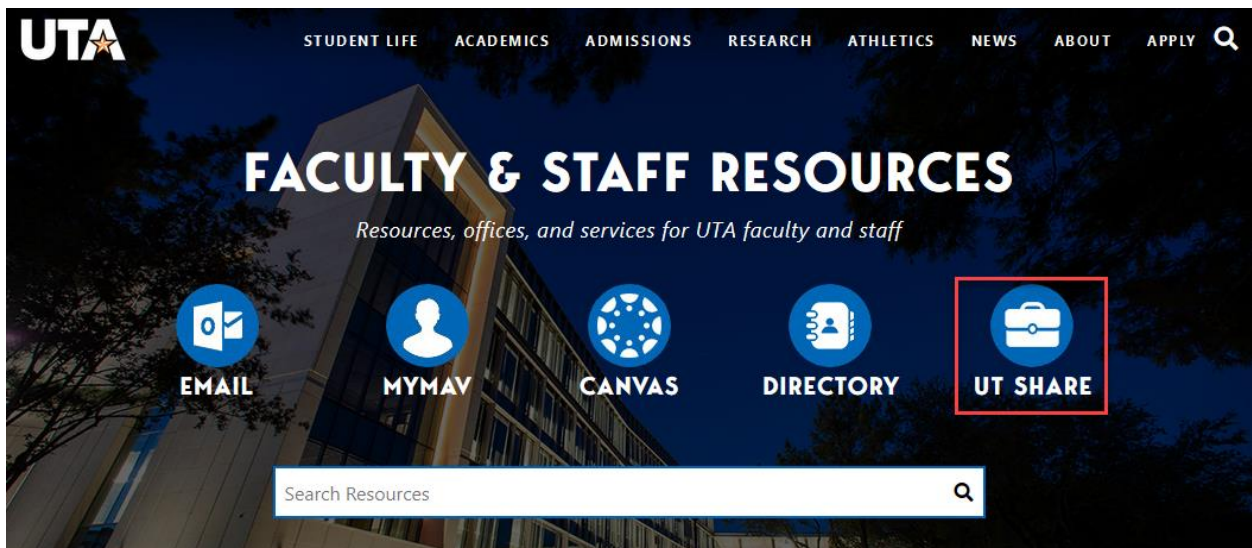
The Navigating Overview section introduces you to the basic UTShare navigational elements.

## Log in to UTShare

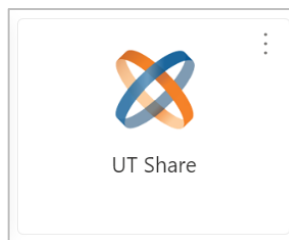
1. Starting from the **UTA homepage** (<https://www.uta.edu>), click the **Faculty & Staff** link located in the top-right corner of the page.



2. Click the **UTShare** button on the right side of the list at the top.



Alternately, you can access UTShare from the [UTA Apps page](https://myapps.uta.edu) (myapps.uta.edu) by clicking on the **UTShare icon**.

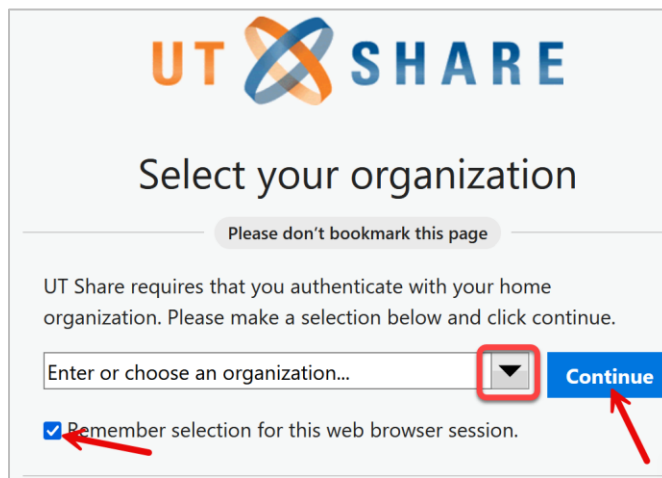


OR you can go directly to [uta.edu/utshare](https://uta.edu/utshare) to access UTShare.

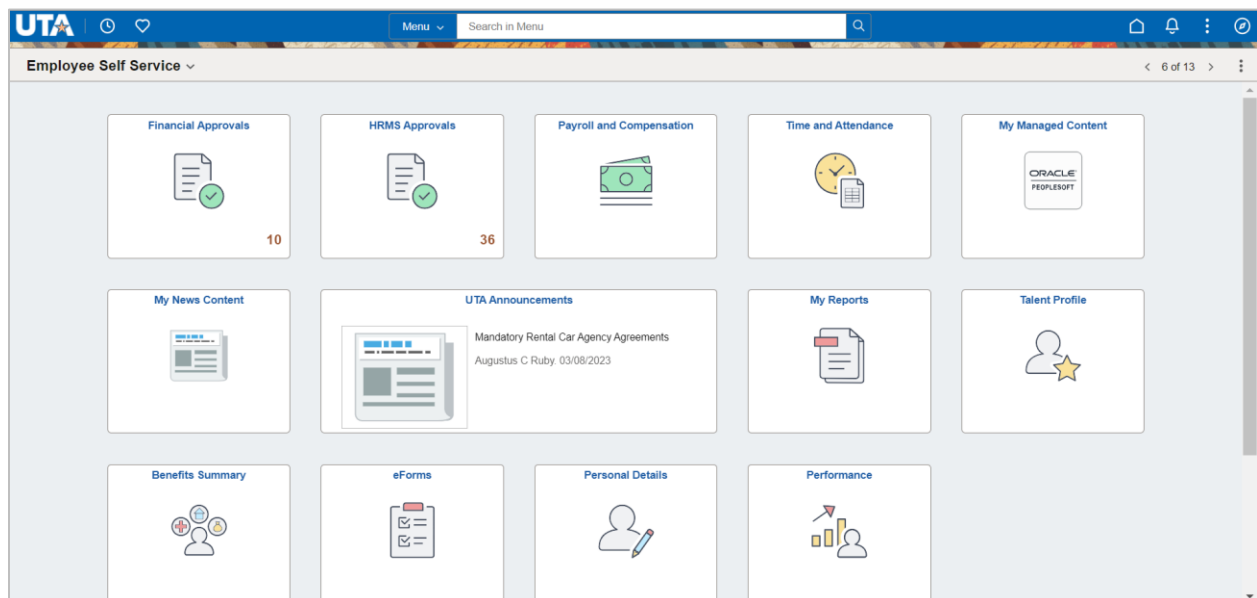
3. On the Microsoft Sign In page, enter your **UTA email** and click **Next**.
4. Enter your **NetID password** and click the **Sign In** button.

**Note:** *If you are accessing UTShare from outside of the UTA network (e.g. working from home), you will be required to authenticate through MultiFactor Authentication.*

5. UTShare requires that you authenticate with your home institution. Use the dropdown menu to select **The University of Texas at Arlington**.
6. Click the **Continue** button. You can also check the box next to “Remember selection for this web browser session.”



7. The UTShare homepage displays.

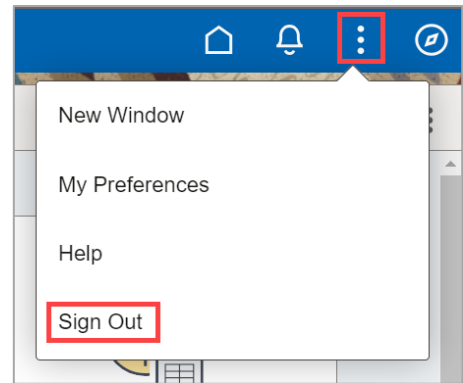


The homepage that displays upon login is, by default, the Employee Self Service page. Each tile on this homepage can be used to access functional pages in UTShare.

- To Sign Out, click the Action menu in the top right corner and select Sign Out.

**Note:** For security purposes it is important that you sign out when you are finished with your session. Do not simply close the browser window. Other users could potentially access your account if you do not sign out properly.

As a security precaution, your session will end after 2 hours of inactivity.

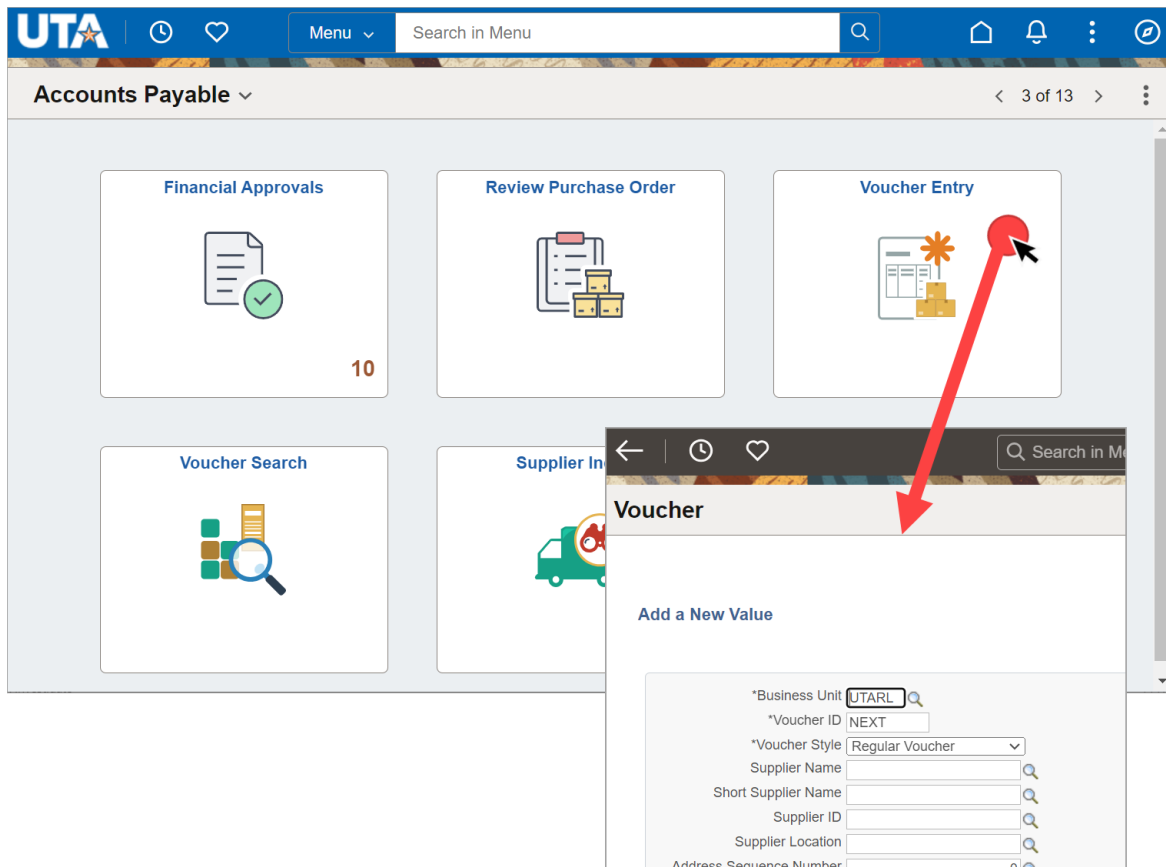


## Navigating to a Functional Page

There are two ways to navigate to a functional page: using the tiles on Homepages or using the NavBar Menu.

### Tiles on Homepages

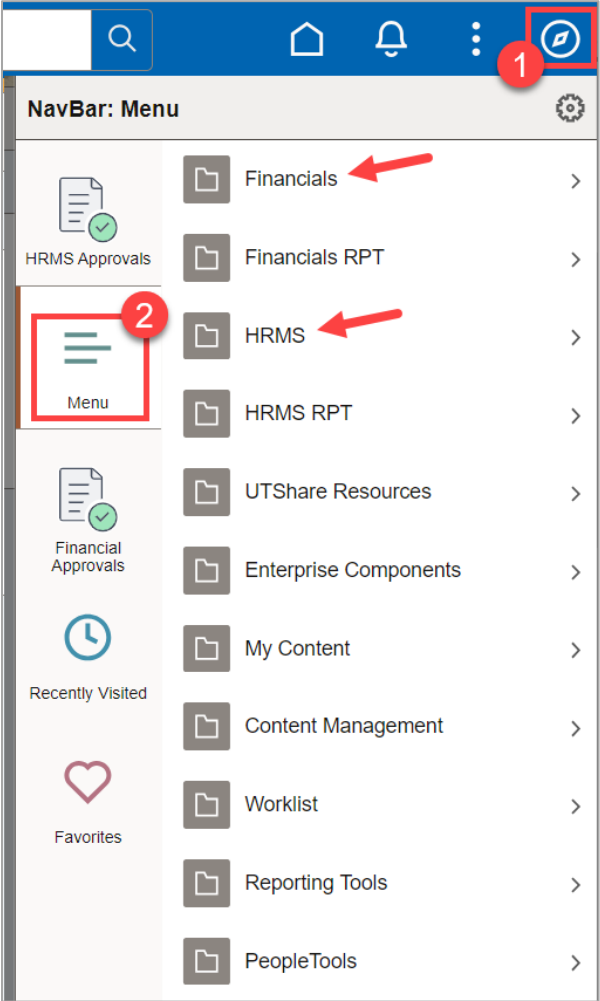
Each of the tiles on a homepage will take you to a functional page. Which homepages and tiles you can access depends on the security that has been granted.



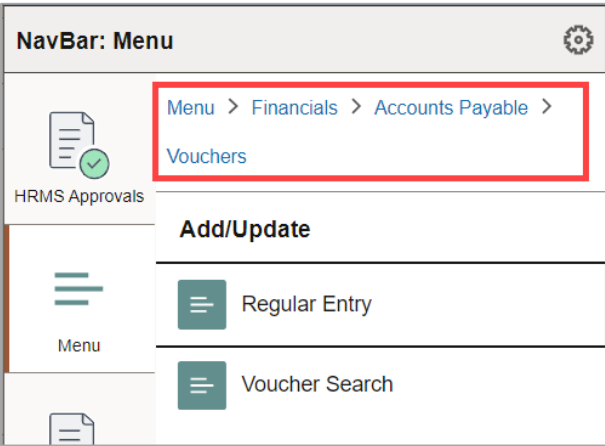
### NavBar Menu

Click **NavBar > Menu** to access UTShare’s main Menu. For most functional pages, you do have to first select “Financials” for financial functional pages, or “HRMS” for HR-related functional pages.

Which Nav Bar Menu options you will see depends on the security that has been granted.



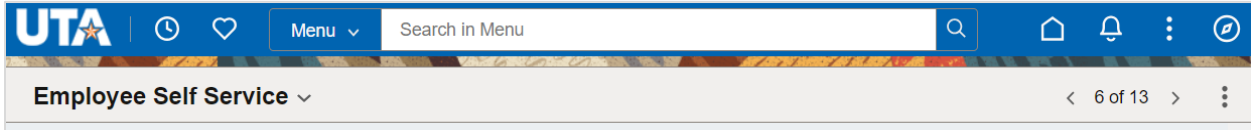
The breadcrumbs at the top of the menu will take you back to either the last menu or back to the root (Financials or HRMS) menu.



## Universal Navigation Elements

This topic describes some of the basic navigation elements common to all pages in UTShare.

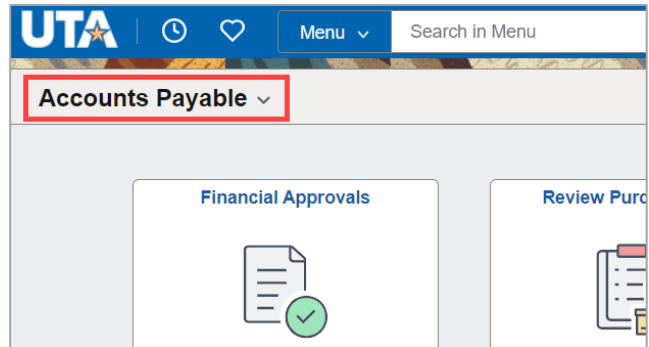
The Header Menu is displayed at the top of the page. It provides options to navigate to a different homepage, perform a search, view notifications, take various actions, and access the NavBar.



## Homepage Navigation

There are a number of Homepages within UTShare. Each Homepage contains tiles for related pages. Homepages allow users to access to different areas of UTShare without having to use the NavBar menu, often requiring fewer clicks to access the page.

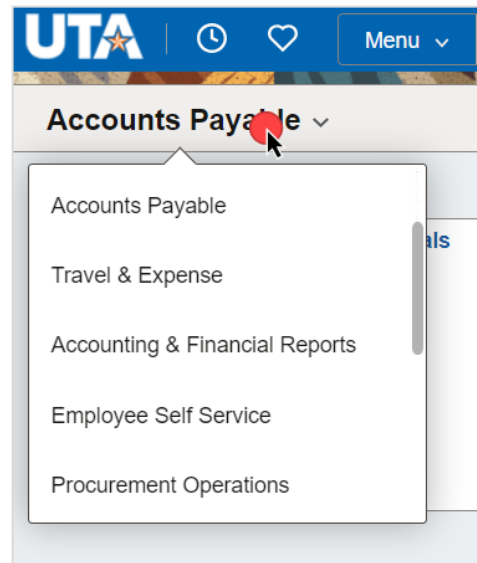
The title displayed in the blue menu bar indicates which homepage is currently displayed.



Clicking on the homepage title provides a drop-down menu of accessible homepages. There is a scrollbar on the right of this drop-down menu that can be used to scroll through all available homepages.

The order in which the homepages are listed can be customized on the Personalize Homepage page in the Actions menu.

**Note:** *The homepages accessible to a user depend on the security granted to the user.*



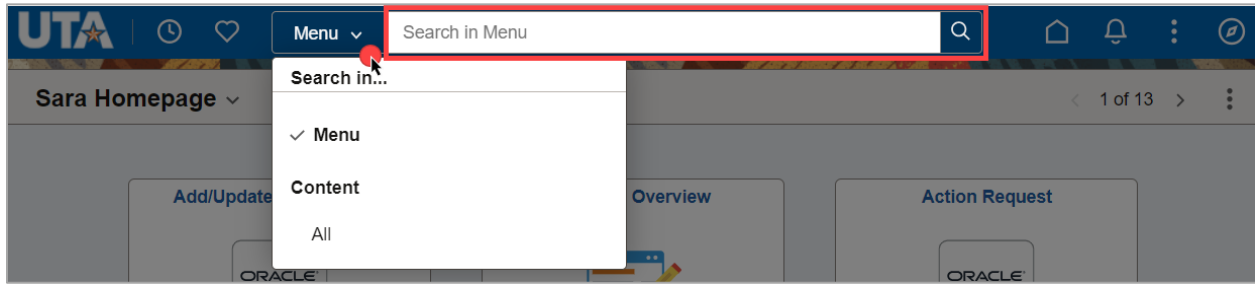
## Home Button

The Home button returns you to the homepage at any time.



## Global Search

The Global Search button allows you to search in UTShare for a page or function.



Upon clicking the Menu button, you can specify if you want to search for a Menu item or in All Content. Once the selection is made, enter the keyword(s) in the “Search in Menu/All Content” box. If the keyword is found, a screen with all search results will populate.

## Notifications

The Notifications icon will display any alerts or actions. Clicking on the Notifications icon will display the Alerts and Actions.

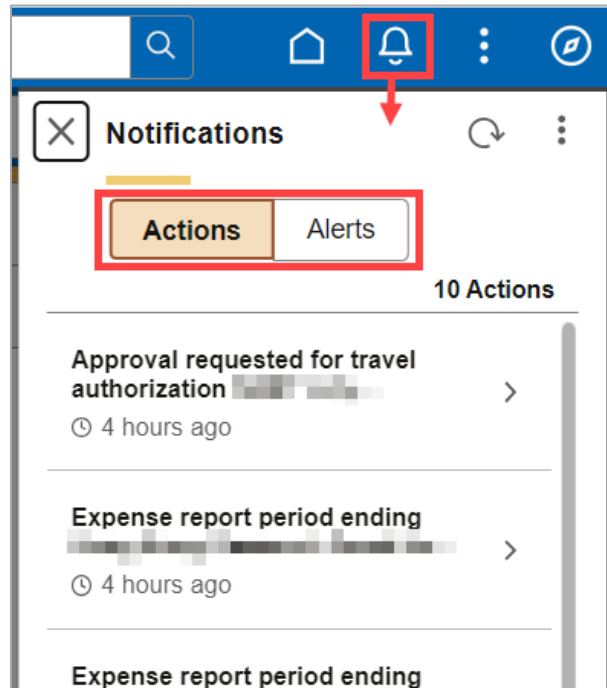
Clicking on the line item for the Action or Alert will take you to the page where the document can be seen and, if needed, action can be taken.



The Refresh button will refresh the notifications list.



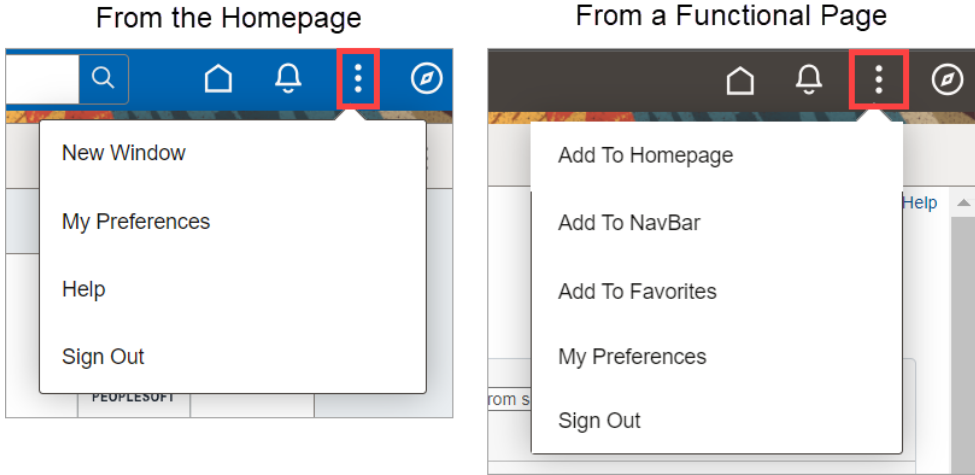
The Notification Actions button will allow you to view all notifications on one page and make notification pane settings.





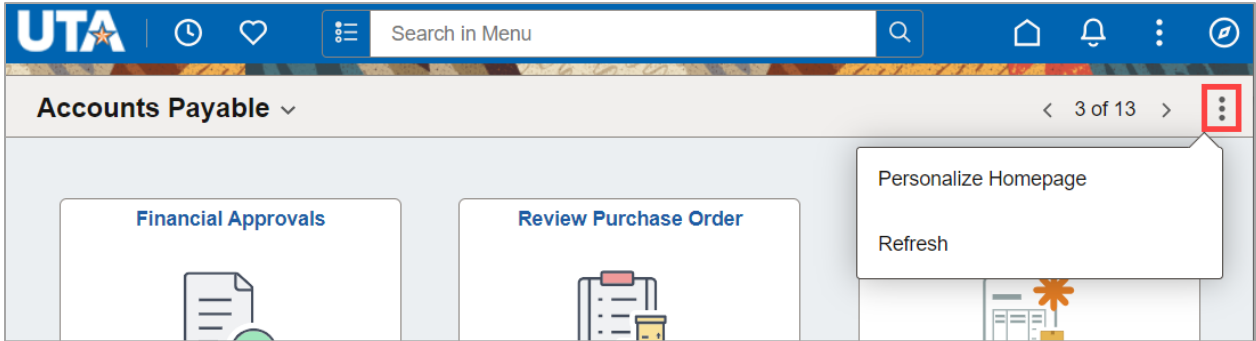
## Actions

The Actions icon provides a list of actions that can be taken. The actions available will depend on the current screen.



### Actions from the Homepage

When accessed from a homepage, the available Actions options include Personalize Homepage (see below for further information) and Refresh the homepage.



## Personalize Homepage

This action allows you to perform several customization options. These options are unique to user profiles, *meaning they cannot be shared with other users.*

To modify your default homepage, on the homepage list on the left of the screen, click and drag the desired homepage to the top of the list. The homepage at the very top of the list will be associated with the Home button.

To reorder your homepage list, on the homepage list on the left of the screen, click and drag the homepage titles to the desired order. This will affect how the homepages display in the homepage drop-down menu.

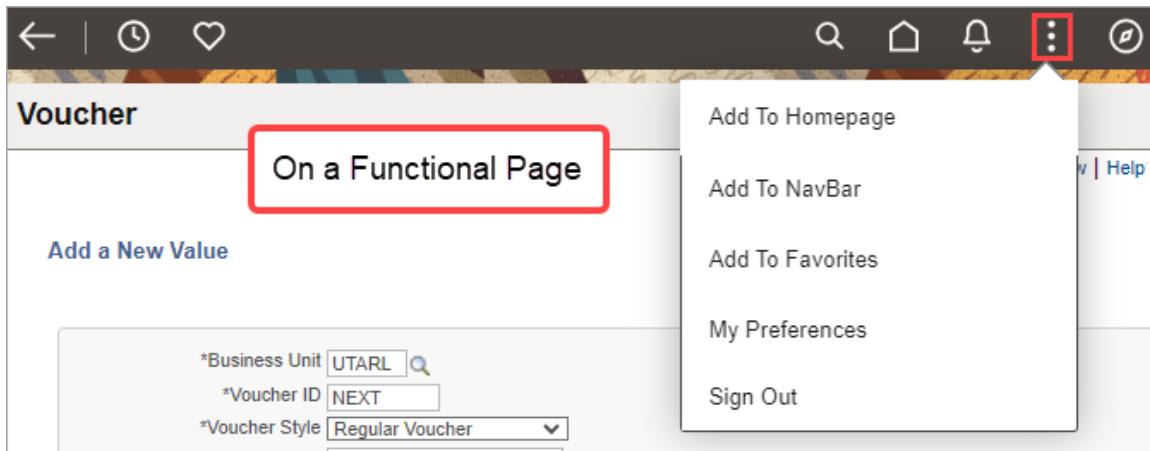
To add a new homepage, click the “Add Homepage” button at the top of the homepage list. This option allows users to create their own homepages that contain tiles for the most frequently accessed pages. Tiles can be added to this homepage while on the functional page using the “Add to Homepage” action (see below).

**Note:** *For programmatic reasons, please do not modify the standard homepages.*

The Show Notifications Panel option allows users to display or remove a notification pane that will populate to the right side of the homepage.

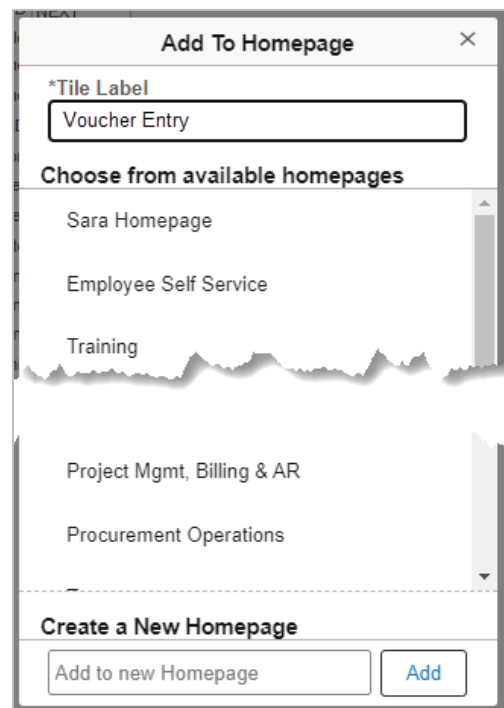
## Actions from a Functional Page

When accessing the Actions menu from a functional page, options include Add to Homepage, Add to NavBar, and Add to Favorites (see below for further information).



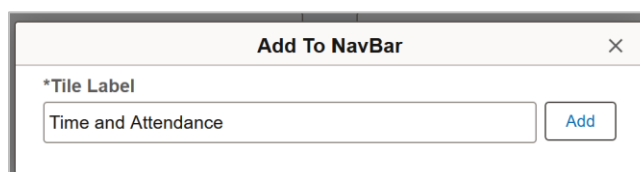
### Add to Homepage

This action allows you to create a tile on a homepage for the specific functional page you are on. When this action is selected, a window will appear where you can give the new tile a specific label, choose the homepage where the page tile should appear, or create a new Homepage containing the tile.



### Add to NavBar

You can add a tile to the NavBar using the Actions menu from a functional homepage. Click "Add to NavBar," then name the tile and Add it.

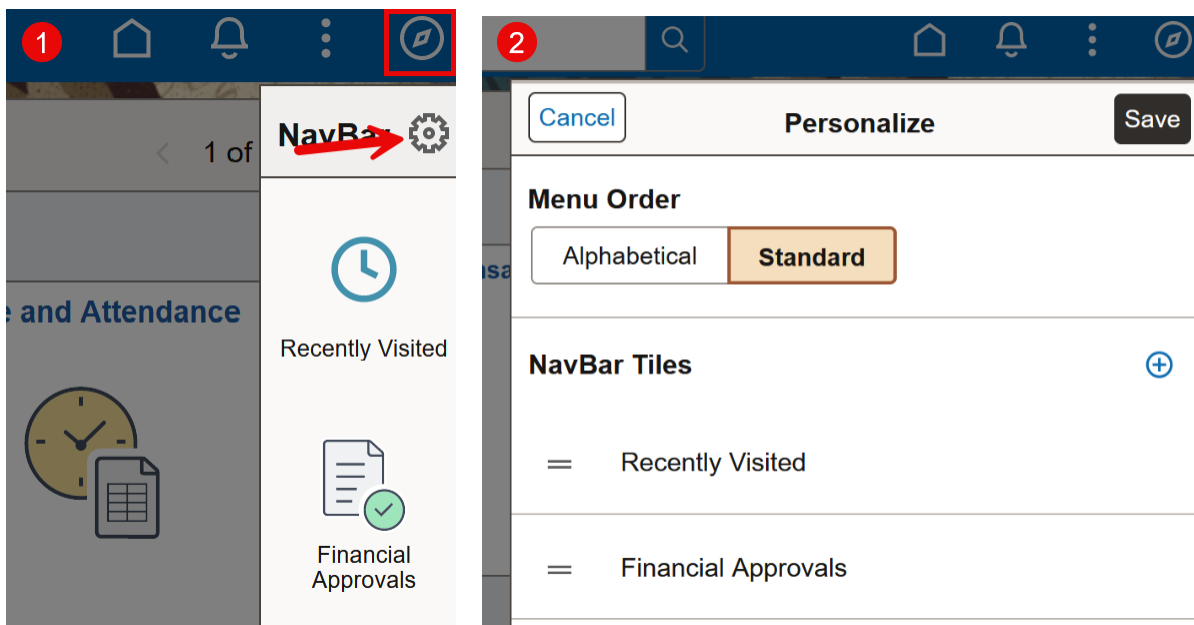


## NavBar

The NavBar is used to navigate to the UTShare functions and modules. Essentially, it is UTShare's main menu. Menu items may differ among users, based on your security settings.

### Personalize NavBar

1. The gear icon for Personalize NavBar takes you to the page where you can modify the NavBar.
2. You can modify the order in which the tiles appear by clicking and dragging the tiles into the desired order. You will also see any tiles added to the NavBar (using the "Add to NavBar" action option from a functional page). These can be removed from the NavBar using the trashcan icon. Click **Save**. Your changes will now be visible in the NavBar.

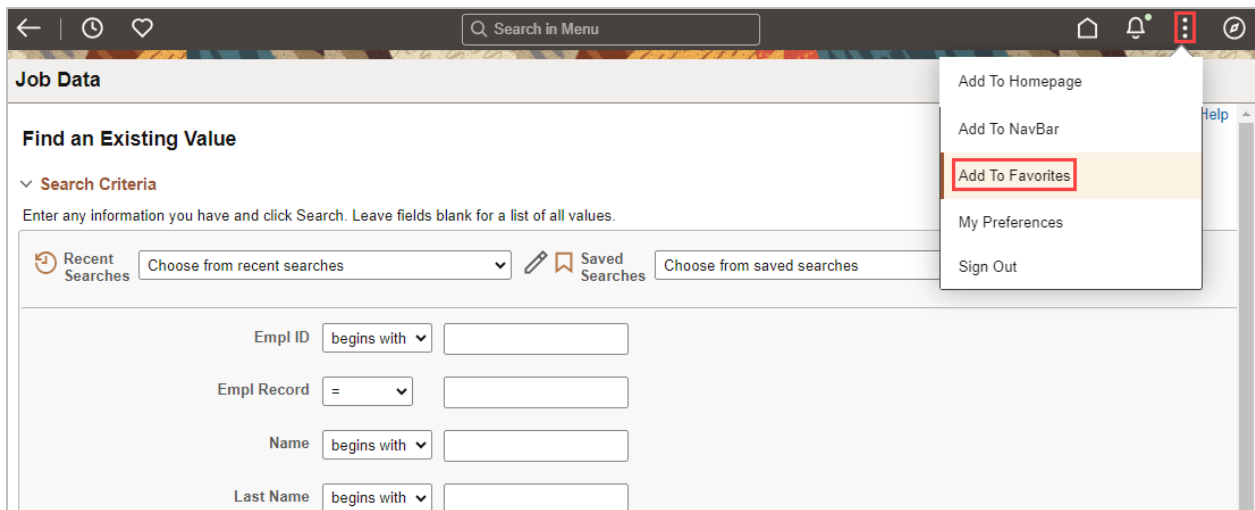


## Favorites

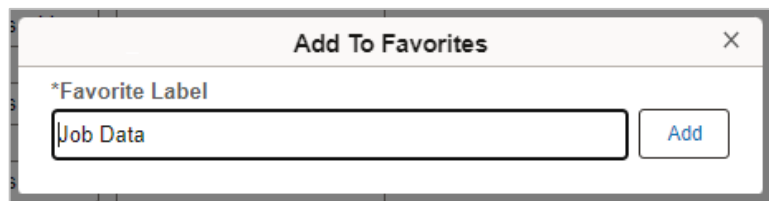
The My Favorites feature allows you to setup bookmarks for frequently used UTShare functions to quickly access components and transaction pages.

### Adding a Page to Favorites

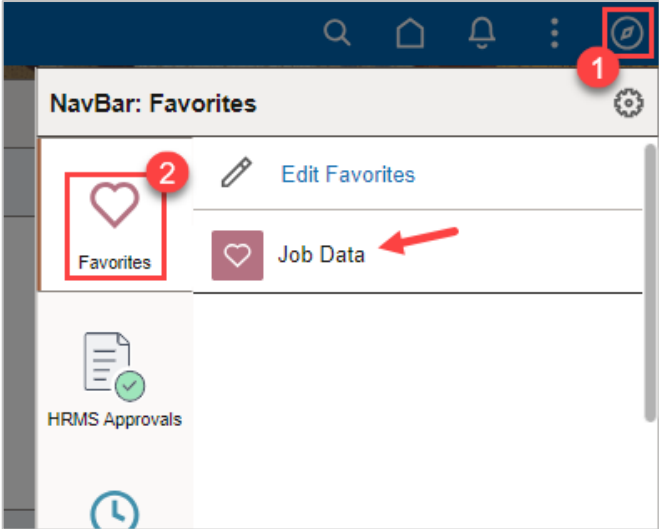
1. Navigate to the page to be made a Favorite.
2. Click the **Actions** icon at the top right of the screen.
3. Click **Add to Favorites** from the drop-down list.



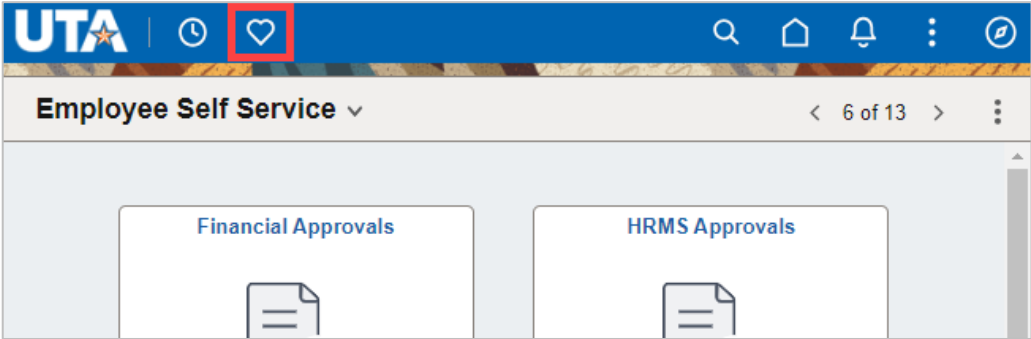
4. The page name populates as the “Favorite Label”. This label can be changed if needed.
5. Click “Add”.
6. A message will populate stating the favorite has been added. Click “OK” to continue.



Now when you go to **Navbar > Favorites**, you'll see the item listed in your list.



Alternately, use the **Favorites** icon at the top-left of the UTShare page.



This will populate your Favorites list on the left side of the UTShare Screen.

