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UT Share Fundamentals
UT Share Fundamentals covers basic concepts, terminology, and navigation techniques.

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

Upon completion of this lesson, you will be able to:

- Log in to UT Share.
- Recognize universal navigation elements.
- Understand the Menu Structure.
- Personalize your homepage.
- Perform a portal search.

Log in to UT Share
The purpose of this topic is to demonstrate how to log in to UT Share.

1. Starting from the UTA homepage (https://www.uta.edu) click the Faculty & Staff link located in the right corner of the page.
2. From the **Quick Links** list, click the **UTShare** link

3. UT Share requires that you authenticate with your home institution. The University of Texas at Arlington should default, however if it doesn’t, choose it from the **organization name** drop down list.

4. Click the **Select** button.
5. Enter your **NetID** and **Password**.
6. Click the **Submit** button.

The UT Share home page displays.

This page is customizable. Each panel is called a “**pagelet**”. The example below displays **Employee Self-Service, eForms, Employee Leave Summary, UTA Announcements, My Reports**.

Click the **Sign out link** to exit UT Share.

**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.
Recognizing Universal Navigation Elements

This topic describes some of the basic navigation elements common to all applications in the UT Share.

**Note:** Some navigation elements may or may not be available based on your security settings.

The elements discussed in this topic include:

- Universal navigation header items.
- Homepage.

The **Universal Navigation Header** is displayed at the top of every page. It remains static as you navigate through the pages. There are links and Tabs.

The section on the top right contains the following links: Home, Worklist, Add to My Links, and Sign out and Search.

**Home**: Returns you to the homepage at any time.

**Worklist**: Displays a list of work items and notifications awaiting your attention; like worklist approvals. This page provides access to the worklist items to see additional details get information and take action.

Click the blue worklist link to navigate to the page where you can perform the indicated work, and if necessary, reassign work items. Below is an example Worklist:

![Worklist Example](image)

**Add to My Links**: Allows you to add the current page to your list of favorites. The favorites list is your own list of bookmarks to a component or transaction page that you use frequently. Once you add a favorite, it appears under the **Favorites** menu. You can return to the page by expanding **Favorites** and clicking the link for the page.

**Sign out** is used to exit the application.
The **Search** box appears at the top of each page. It allows you to perform a search for topics or pages within the portal.

The tabs located across the page may differ for each user. The two most common tabs are **Employee Self-Service** and **Training**.

Click the **Employee Self-Service** Tab to display the pagelet. The Employee Self-Service pagelet contains links to your personal and employment information which can be viewed and edited as needed.

1. Click on the active links to drill into each topic.
2. Click the arrow on the gray panel to Minimize or Expand the pagelet.

### Understanding the Menu Structure

- **Favorites** menu is one you create with your own list of bookmarks to a function or transaction page that you use frequently.

- The **Main Menu** is used to navigate to the UT Share functions and modules. Menu items may differ among users, based on your security settings. The menu items are grouped in cascading or hierarchical folders, that appears to the right of the menu item. Click the **Main Menu** link from the home page.

  The cascading menus display a hierarchy of folders and content references that you can use to navigate to various pages.

- The **Sort** icon is used to sort the menu list in ascending or descending order which makes it easier to find menu items.

  The Personal Information Summary page displays.
The collective set of links across the top of the page is the breadcrumb trail. This is the hierarchical menu path to your current location.

1. Click any link within the breadcrumb trail to return to a previous page or to move to a different page.

2. Click the **Home** link on the top right of the Universal Navigation Header bar to return to the homepage.
Favorites Menu

There are two ways to add a favorite.

1. Add the page you are actively on. Use the Add to My Links “link” in the top right corner of the header.
2. Click the Favorites link in the top left corner and add it directly to the Favorites menu.

In either case, once you add a favorite, it is maintained under the Favorites menu. Expand the Favorites menu and click the link that you want to view.

Option 1

1. Navigate to the page you want to add using the Main Menu. This example is Job Data.
2. Click the Add to my Links “link” on the top right header bar. The Add to Shortcuts pop up displays.
3. Enter a Name for the Favorite in the Name field.
4. The *Folder field defaults to My Links.

Note: If you have created Favorites folders and want to add a new favorite to a particular folder, select the folder from the drop-down list.

5. Click the Save button. The Job Data will now list under the Favorites menu.

Option 2

1. Navigate to the page you want to add as before. This example is Job Data.

2. Click the Favorites drop down on the left navigation bar.

3. Click Add to My Links.
The Add to Shortcuts pop up displays.

4. Enter a Name for the Favorite in the Name field. (Sometimes the name will auto populate for you.) Enter the Folder or leave as My Links.

5. Press the Save. button.

In either case, the pop up disappears, the page gets added to the Favorites drop-down.

Click Favorites and Job data will display in your list.
Personalize Your Homepage

Use the Personalize Content and Layout links to customize the layout and content that appears on the portal homepage.

The Personalize Content page is used to select pagelet items that you want to appear on your portal homepage. The Layout page is used to organize and customize the pagelets.

1. Click the **Content** link.

The Personalize Content screen displays showing check marks by the pagelets selected.

2. Check the pagelets to add them to the home page.
3. Uncheck the pagelets to remove them from the home page.
4. Press the **Save** button.

**Note:** *Those with gray check marks cannot be removed, those are systematically set.*
The Personalize Layout screen displays.

4. Click the **radio button beside 2 columns or 3 columns** for your page.

5. The pagelets are listed under the current column positions. **Left Column** and **Right Column**.

6. Click the pagelet name and the directional arrows to move the pagelet between columns.

7. Use the Delete Pagelet button to remove a pagelet altogether.

8. Use the directional arrows again to move the pagelet order within the homepage columns.
Pagelet Personalization

Some of the pagelets allow personalization and Remove in addition to the Minimize and Expand option. The personalization options vary based on the type of information that appears in the pagelet.

**Personalize**

1. Click on the personalization icon.
2. Click Personalize.

In this example, the **Personalize My Reports** page allows a user to indicate the maximum number of reports to display on the homepage and also specify which reports to display based on the date and time stamp they were run.

3. Enter the **Maximum Reports** to display.
4. Enter the **within number of days or hours** if desired.
5. Press the **Save Options** button.
6. Click the **Close and Return to Home Page** link.

**Remove**

To remove a pagelet from your homepage. This does not delete the pagelet from the system.

1. Click the **Remove** link.
2. Click the Yes – Remove button to confirm the removal.

**Minimize and Expand**

1. Click the **Expand** and toggle between minimize and expand to display an open pagelet or closed one. This example shows all pagelets minimized.
Perform a Portal Search

The Search box located in the banner appears at the top of each page in the portal. This feature allows you to perform searches on content located in the portal.

1. Click the **Search** button.

2. Select a **Category** if desired.
3. Enter **Keywords**.
4. Click the **Search** button.

The Search results display in the View Search Results panel.

5. Click on any of the options to go to the page.
6. Click **Home** to go back to the Home page.