Navigation: Basic Navigation of Bear Trax

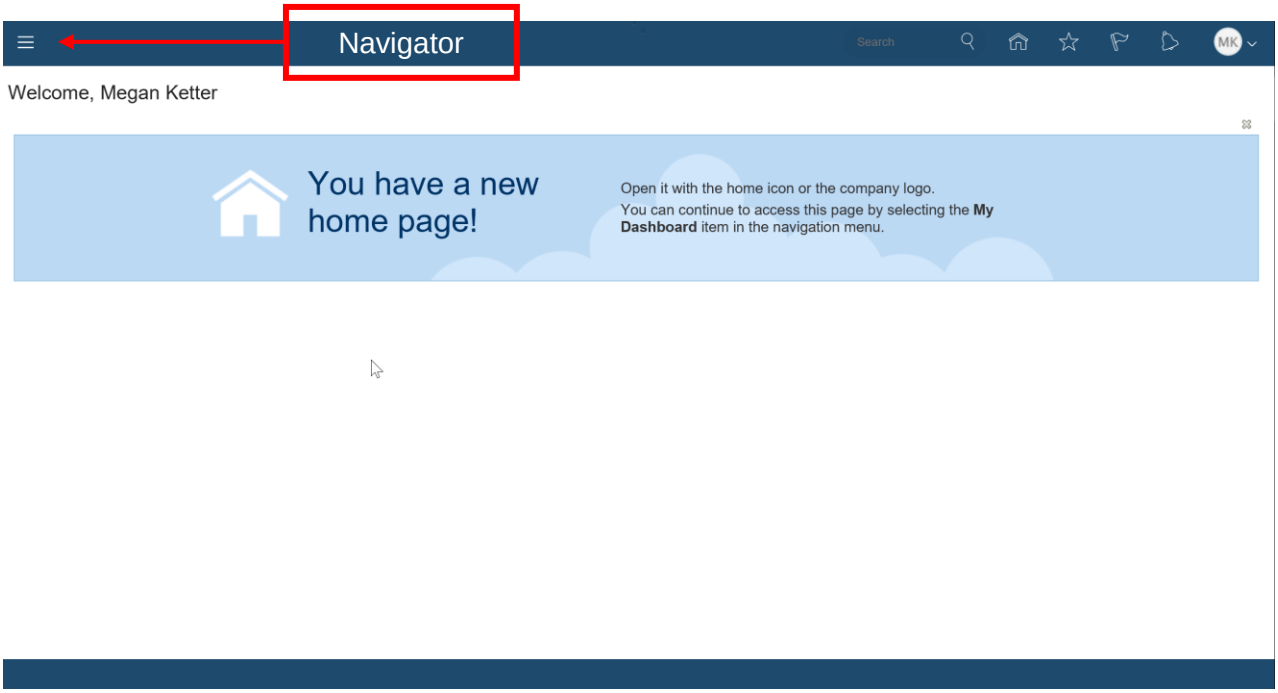
For All Employees

Introduction

Purpose:	Learn about functionality and basic navigation for Bear Trax.
How to Access:	Log into the system using your employee ID and password. Click the Home button to go to your springboard. View your Springboard and the various pages you can visit.
Helpful Hints:	Be sure to keep in mind that… • Exploration is a good thing. Click around to explore what's there. • Clicking the icon will always bring you back to your home page. • Viewing the icon notifies you of items requiring your action. • Clicking the icon shows the Navigator menu, which lists major and often-used Bear Trax functions with related actions. • Watch Video Tutorials on how to do various tasks by accessing the Getting Started page.
Procedure:	Complete the following steps to explore your Bear Trax Home Page, the tool bar, Navigator and other basic functionality.

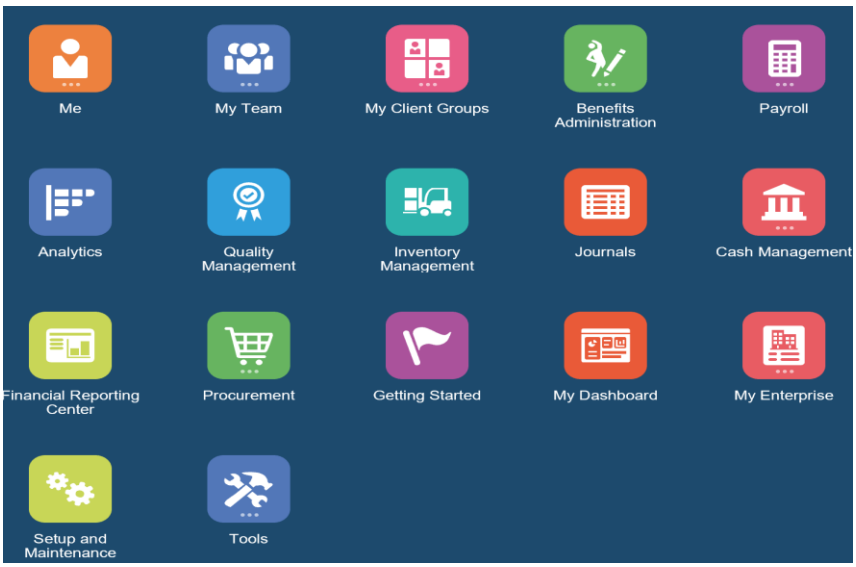
Navigating the Home Page

Click different icons on the Home Page to access other tasks and common functionalities.



1. Click the Home button to return to the Home page at any time.

2. Each tile opens a different workspace where you can complete different tasks.

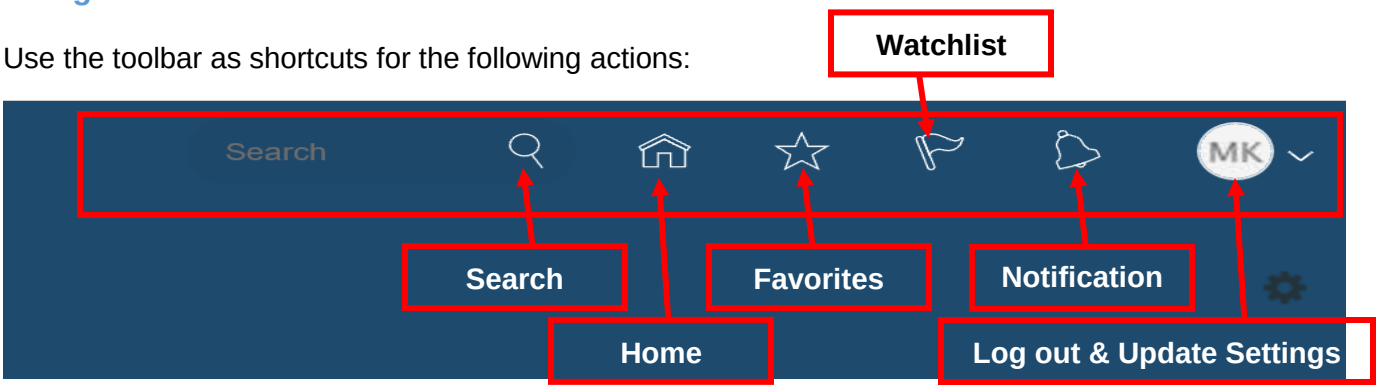


3. Below is a summary of each tile:
4.

Icon	Actions
Me	View and Edit Personal Information, Benefits, Enter Time and Expenses.
Time	View Past and Current Time Entries
Procurement	Submit Purchase Requisitions to Purchase Necessary Items and Upload Receipts
Getting Started	View Video Tutorials on Completing Tasks
My Dashboard	View Important Items or Access your Home Page
Worklist	View and Complete Notifications, Approvals, and Tasks Assigned to You
Reports and Analytics	Create Reports to Make Data-Driven Decisions

Using the Toolbar

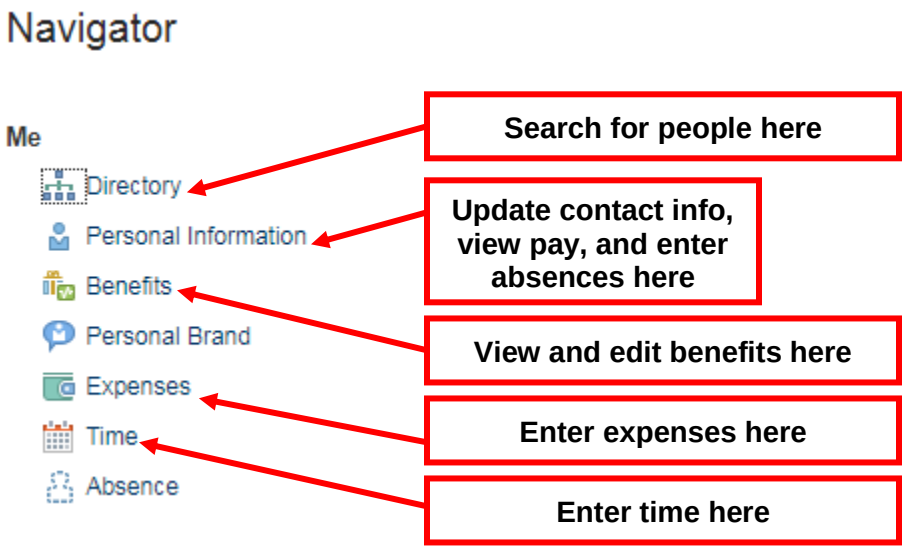
Use the toolbar as shortcuts for the following actions:



Item	Actions
Home	Click to go to the Home Page.
Search Bar	Click to enter tasks or data you need to find and search.
Favorites	Click to add a page as a favorite. This is like a Bookmark.
Watchlist	Click to view a list of shortcuts to work areas through saved searches.
Notifications	Click to view notifications and items requiring your attention.
Settings and Sign Out	Click to adjust various other settings or to sign out of your account.

Using the Navigator for Employees

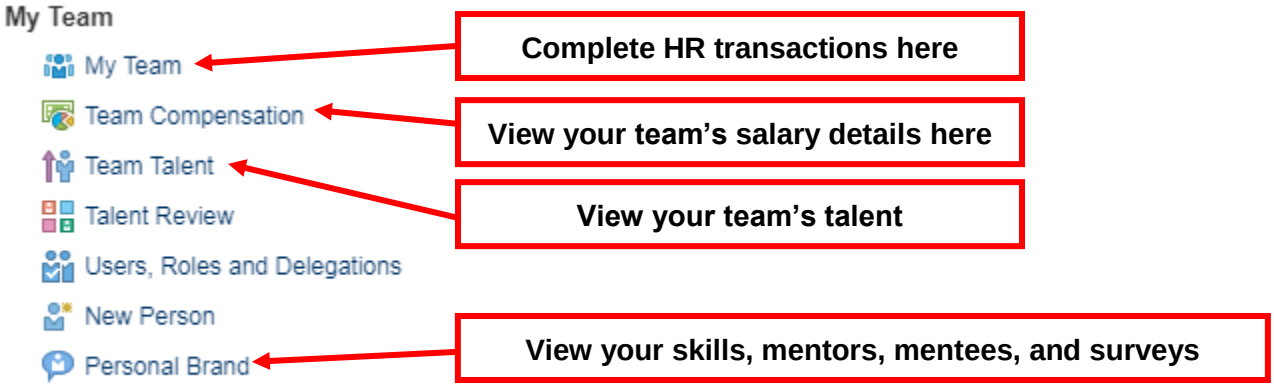
Use the Navigator to quickly complete a variety of actions. Click to view action categories.

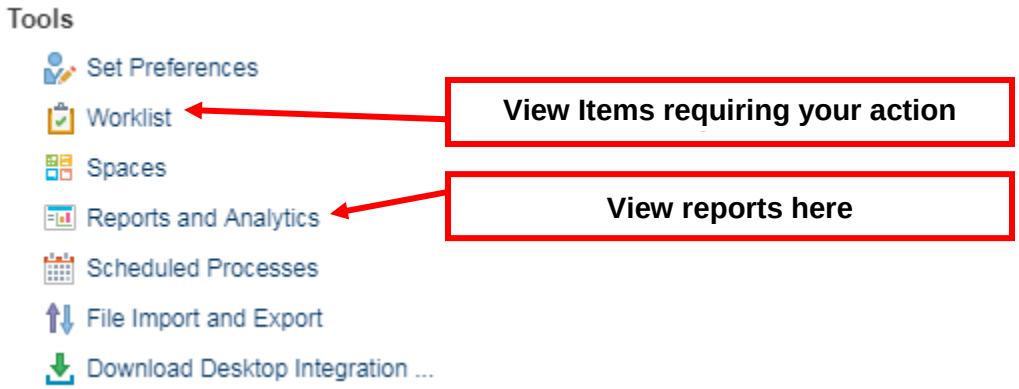


Below are section descriptions:

Category	Links	Actions
Me	Directory	Click to search for specific people and employees in the system and view org charts
	Personal Information	Click to view, edit, or submit various details related to your personal information and absence requests.
	Benefits	Click to view and edit or submit your benefit elections and information about them.
	Personal Brand	Update Skills, Mentorship, and Surveys
	Expenses	Click to submit expense and travel expense reports.
	Time	Click to make time entries and see previous time cards.
	Absence	Short cut to view leave balances or add a new leave request

Using the Navigator for Managers





As a manager with Budget Authority, you can also view your department budget information in this section.

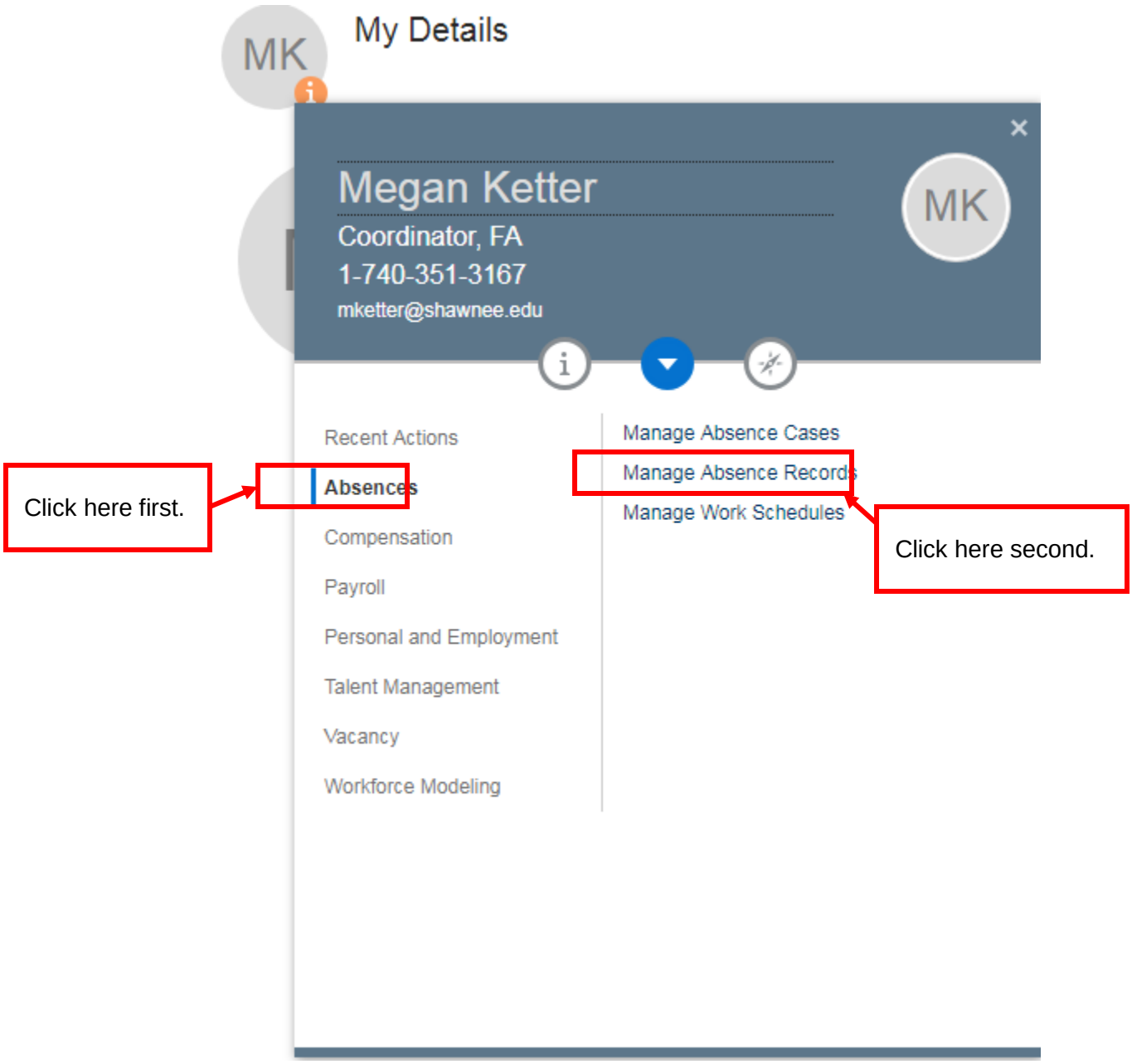
Using the Me Functions

Personal Information

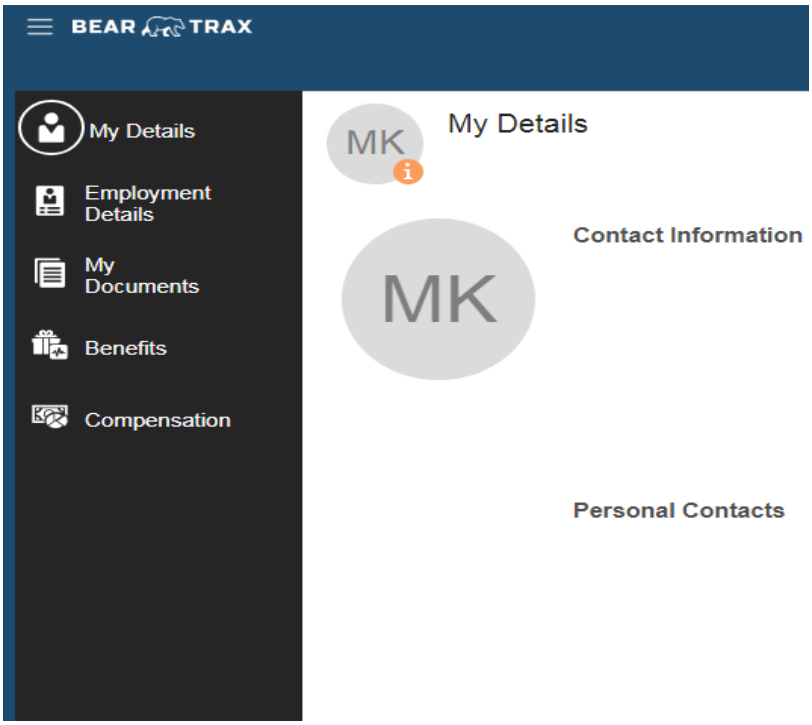
1. Edit personal information from this page.

2. View and submit or edit absence requests.

3. Go to Personal Information
    a. Click the arrow next to your profile picture
    b. Click Absences
    c. Click Manage Absence Records



d. View other important information including benefits, payroll, compensation, and employment.

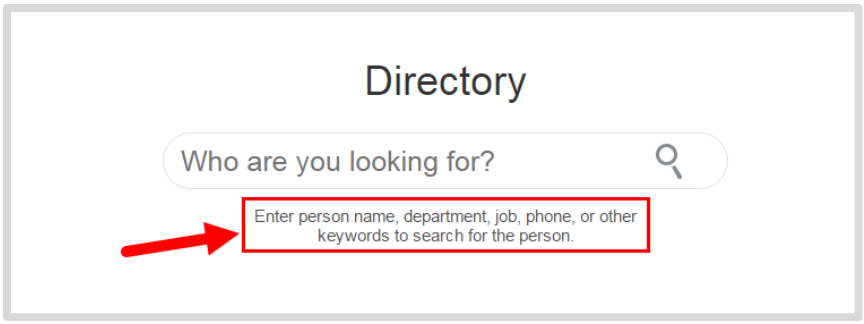


e. Click the respective icon to access each different page for information.

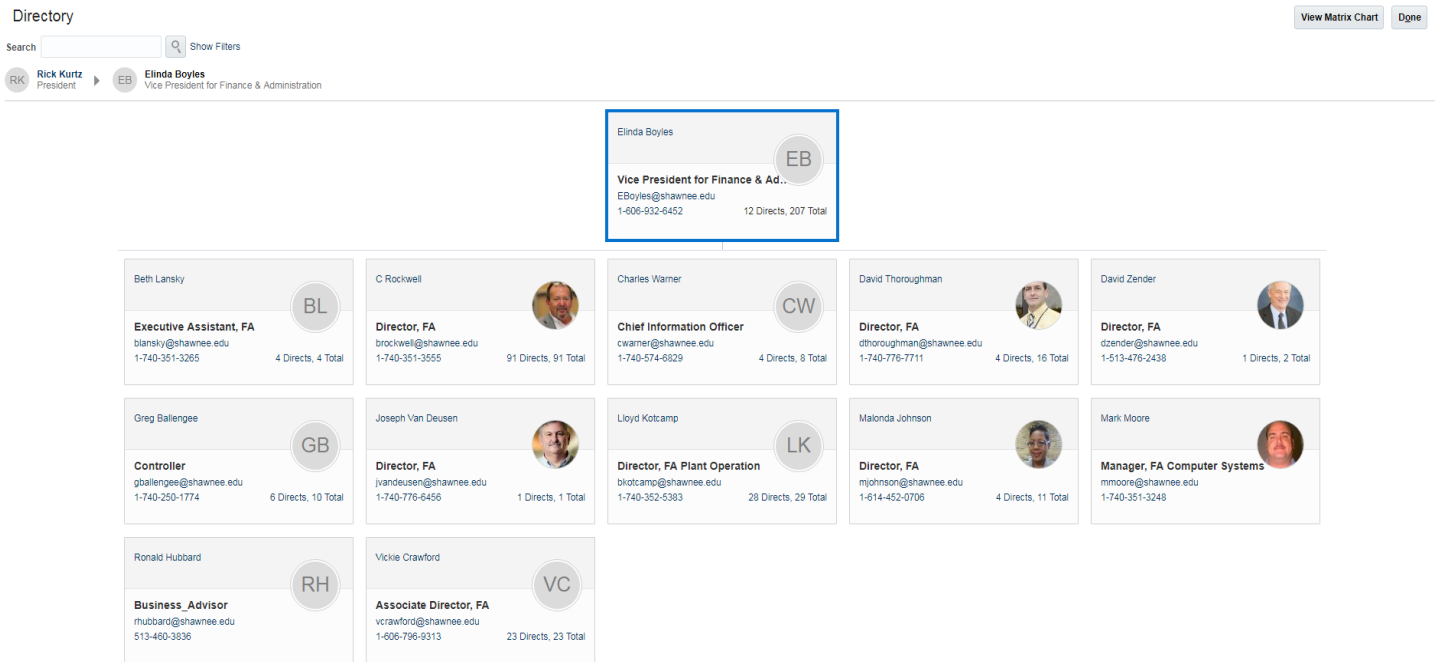
Button Name	Icon	Actions
Employment Details		Use this page to view your hire date and other job details.
My Documents		Use this page to view payslips and other uploaded documents.
Benefits		Use this page to view current enrollments, costs, and to make updates or changes.
Compensation		Use this page to view information salary and position grade information.

Using the Directory

Search for specific employees by clicking the link for the Directory.

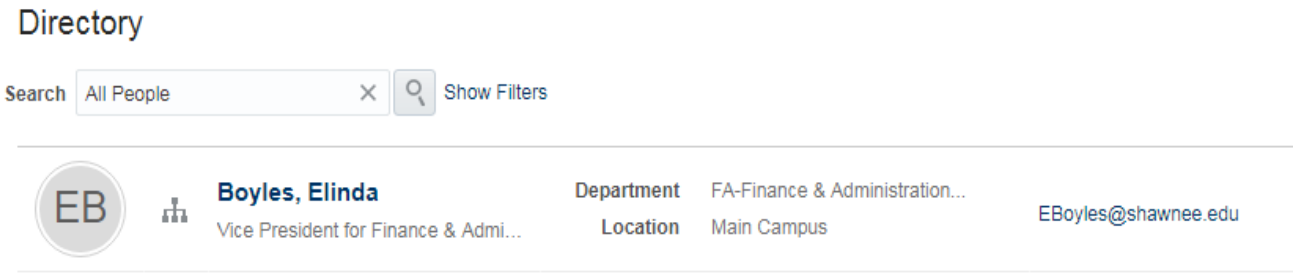


View employees' position in the organization, their managers, and the employees they manage through the Person Gallery.



To search:

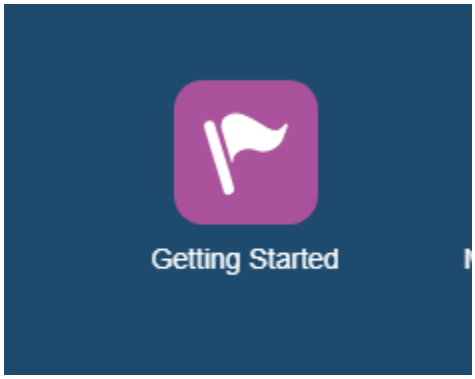
1. Enter the name, department, job, phone number, or related keywords to search for the employee.
2. Press “Enter” or click the magnifying glass icon to search.
3. View the search results. If you did not find what you were searching for, try a different keyword.



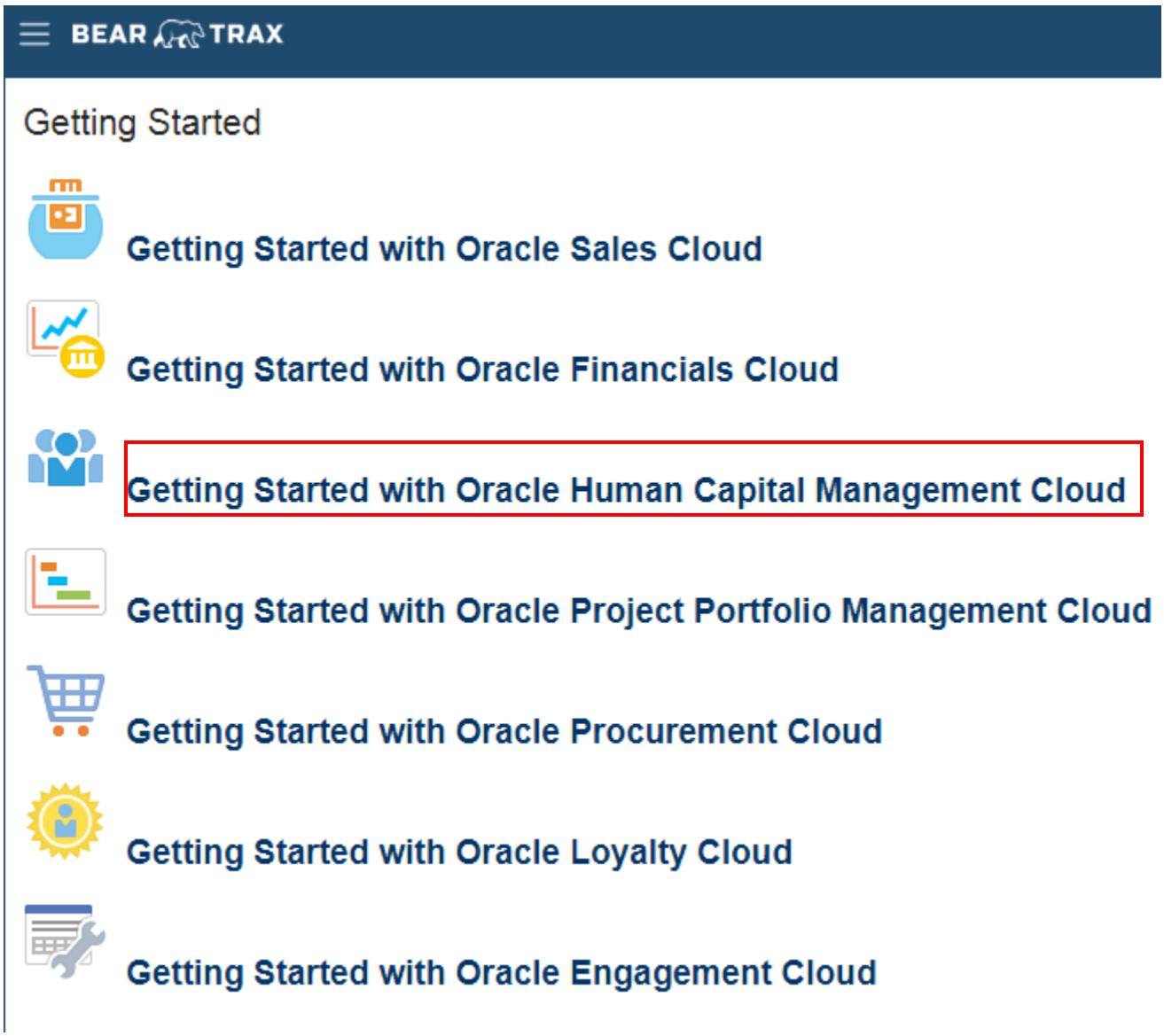
Results display the person’s name, office location, position title, and related contact information.

Getting Started Videos

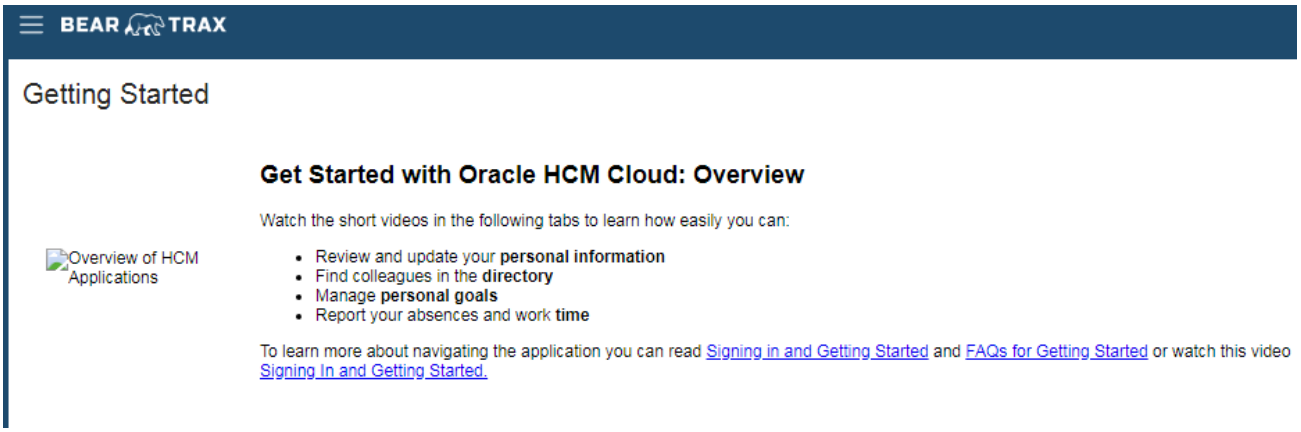
This section of the application is dedicated to giving you extra resources to find step-by-step instructions on how to accomplish your work in Bear Trax. Use these video tutorials to learn how to accomplish different tasks.



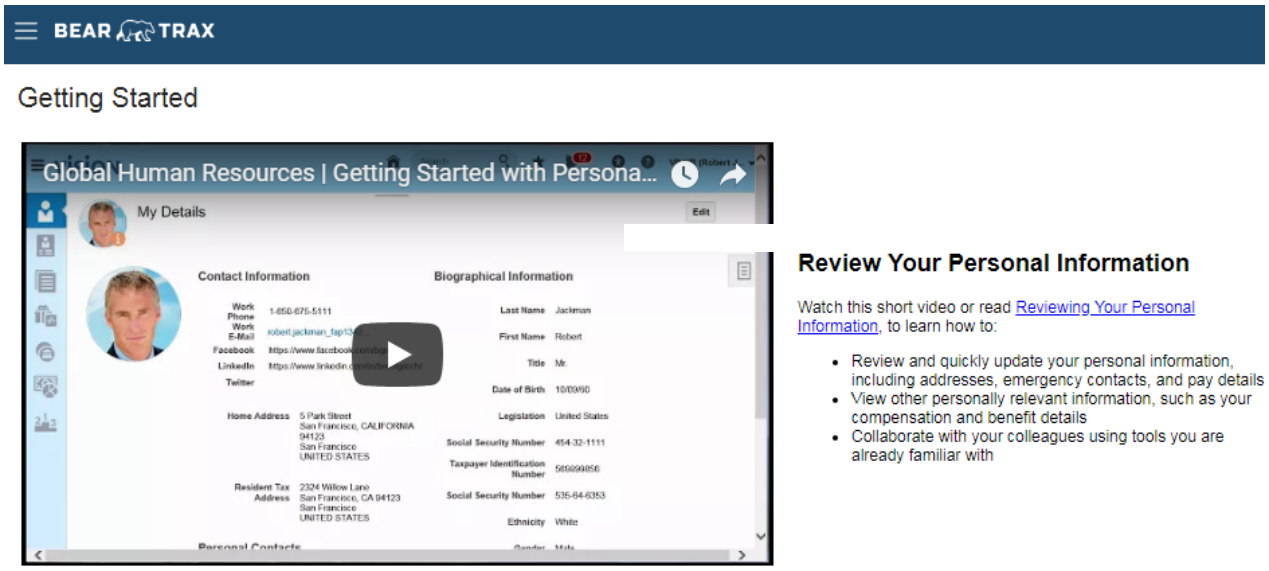
1. Click “Getting Started” to view list of modules.



2. Click the module you want to learn more about. (Human Capital Management will be most useful.)



3. View the tutorials, links, and help given on the different sections.



Final Notes

By following these steps, you have successfully learned how to navigate Bear Trax.