PeopleSoft Finance – 8.55 Fluid Interface

First time Logging In

IMPORTANT: You **must** clear your cache and cookies in _all_ browsers that you use prior to logging into PeopleSoft Finance. For instructions on how to do this, please see the below.
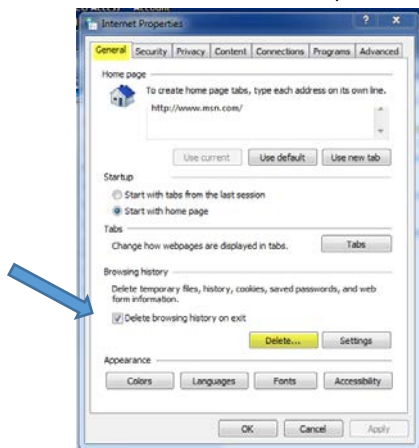
1. **Clear Cache and Cookies in all browsers used prior to logging into PeopleSoft Finance.**

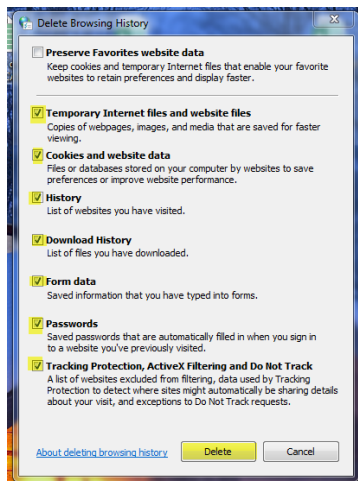   **Instructions for Internet Explorer:**
   - Open up Internet Explorer and click on the 'Tools' icon in the upper right hand corner of your screen:
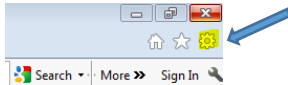
   - Select 'Internet Options'
   - On the 'General' tab, checkbox 'Delete browsing history on exit' and then click 'Delete'.

   - Check all of the boxes as shown below and click 'Delete'. Make sure the top box 'Preserve Favorites website data' is NOT checked:
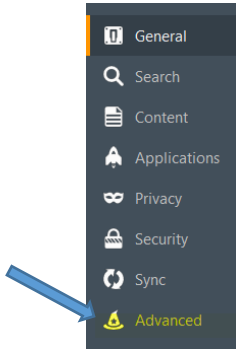
   - Click 'Apply' and then 'OK' and close the Internet Options window. Close out of Internet Explorer and then reopen.
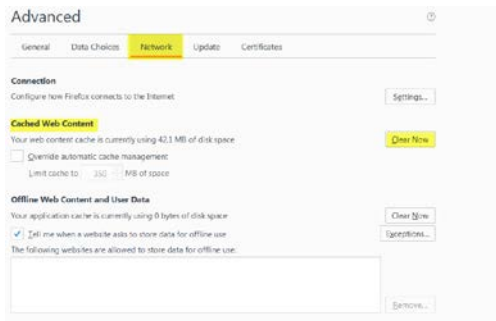
Instructions for Firefox:

- Open up Firefox and click on the 'Open menu' icon in the upper right hand corner of your screen:

- Click on the 'Options' icon and select the 'Advanced' panel:

- Click on the 'Network' tab. In the section labeled 'Cached Web Content' click the 'Clear Now'.
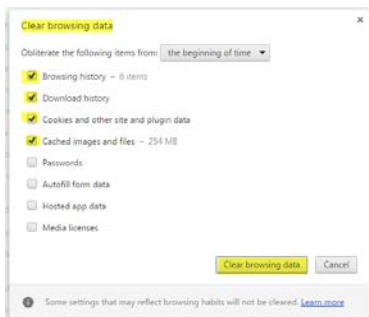

- Close out of Firefox and reopen.

Instructions for Google Chrome:

- Open up Google Chrome and click on the 'Customize and control Google Chrome' icon (three dots) in the upper right hand corner of your screen:

- Select the 'More tools' option and then the 'Clear browsing data' option.
- Check all of the boxes as shown below and click the 'Clear browsing data'.

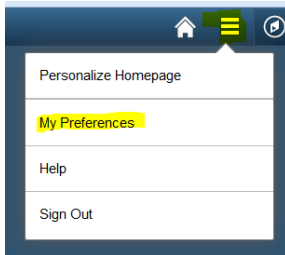- Close out of Chrome and reopen.

Logging into PeopleSoft Finance Module.

When logging into Psoft Finance, the screen below should appear:

You will first want to set up a general setting as follows:

1. Select the Actions List icon in upper right hand corner of screen (3 lines icon) and then select the 'My Preferences':

2. In 'My Preferences' select 'Regional Settings' and change the settings as shown below, make sure to select the Local Time Zone you are located in:
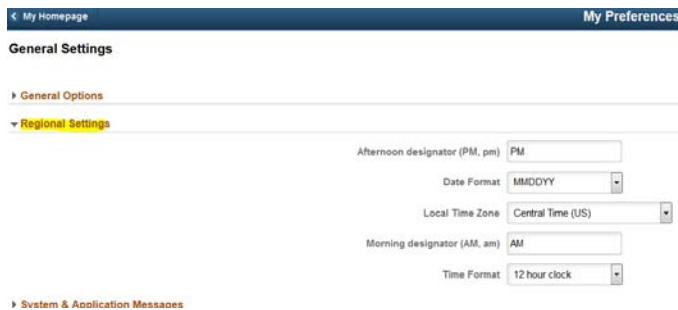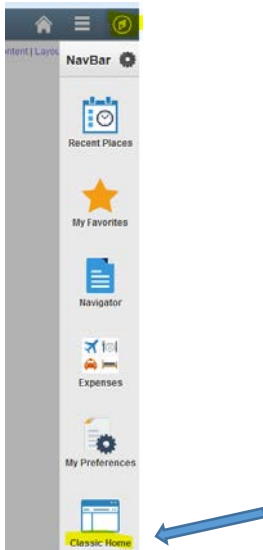

3. Click on the 'Save' button in the upper right hand corner of your screen to save your changes.
4. Select the Home icon in the upper right hand corner of your screen, to get back to the main screen.


To get started, navigate to the Classic Home view and save to your homepage, by completing the below. This will get you started and allow you to complete your daily tasks as needed.

1. Select the NavBar icon located in the upper right hand corner of your screen. Then select the 'Classic Home' button as shown below:

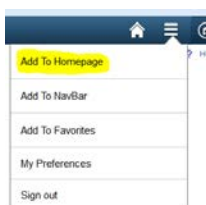The screen should display the classic view as seen in Psoft Finance previous to the upgrade:
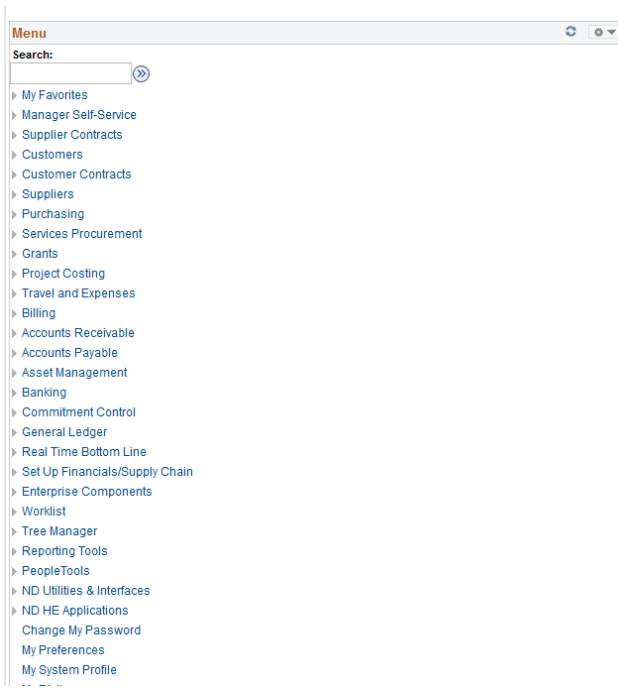
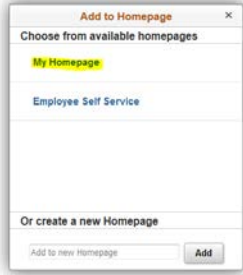To save the Classic Home as a tile on your 'My Homepage':

1. Select the Classic Home view as shown above.
2. When in the classic view page, select the Actions list (3 bars icon) in the upper right hand corner
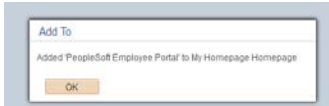

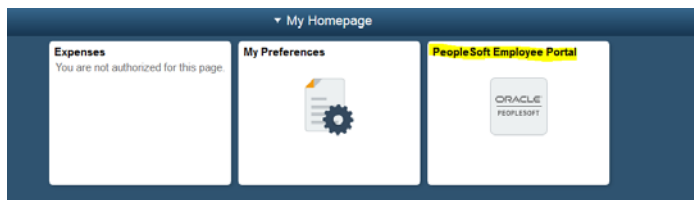3. The following drop down will appear. Select 'Add to Homepage'

4. Choose the homepage you would like to save to, such as 'My Homepage'.


5. Select 'Ok'

6. Click on the Home icon [icon] in the upper right hand corner of your screen. The Classic Home tile should be saved to this homepage for easy access when logging into Psoft Finance.
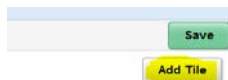

You may also save your favorites and recent places to your main homepage for easy access:

1. Select the Home icon to get to your main homepage 'My Homepage'
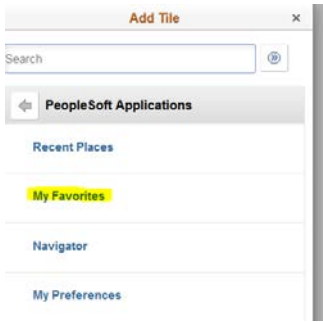2. Select the Actions list icon and choose the 'Personalize Homepage'
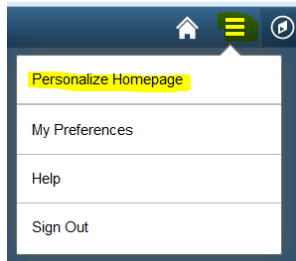
3. Choose the 'Add Tile' button, to add 'My Favorites' and 'Recent Places' to your homepage.

4. Under the Add Tile drop down, select 'PeopleSoft Applications' and then select 'My Favorites'

5. Click on the 'Save' button in the upper right hand corner of your screen to save your changes.

6. Complete the above steps to create a tile on your homepage for your 'Recent Places'.

You can also save tiles of various places you use most to your main homepage. Such as the Accounts Payable WorkCenter, Query Viewer, General Reports, Budget Reports…

1. Go to the page you would like to save to your homepage. In the examples below the Accounts Payable WorkCenter, and Budget Transaction Detail Reports are saved to 'My Homepage'

2. You can either choose the page from the classic view or by using the Navigator.

3. Below is an example from classic view:

   • Go into your 'Classic Home' view. Select Accounts Payable>Accounts Payable WorkCenter
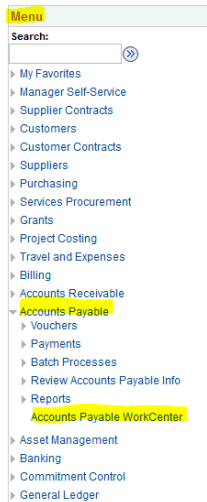
   • On the Accounts Payable WorkCenter screen, select the Actions List icon (3 bars icon in upper right hand corner of screen), and then select 'Add To Homepage':
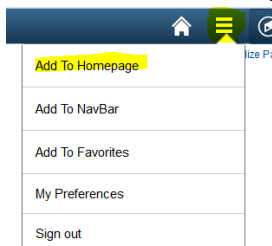
   • Select the homepage you would like it added to, such as 'My Homepage', if this is the main homepage you are using.
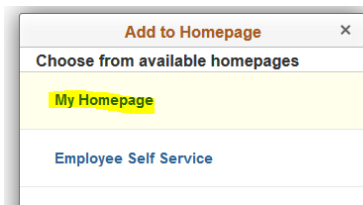
- Select 'Ok' to add to your homepage. If you select the Home icon, you should now see the Accounts Payable WorkCenter tile.
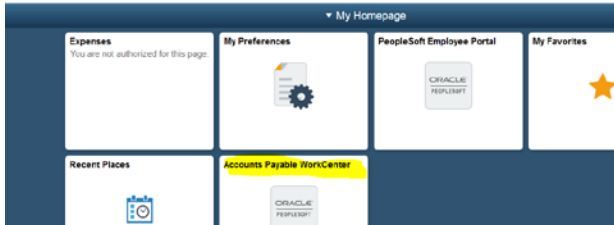
4. Below is an example of using the Navigation bar to save the Budget Transaction Detail report to your homepage:

- Select the NavBar icon and select the 'Navigator' button:

- Find and click on the following: Commitment Control>Budget Reports>Budget Transaction Detail to get to the Budget Transaction Detail search criteria screen.

- From this screen, click on the Actions List icon (3 bars) in upper right hand corner of screen and 'Add to Homepage'.
- Select the homepage you would like the tile to appear and then select Ok on the 'Add to' popup box.

When you click on a tile you have saved on your homepage, it should only take you to the main screen of the item you are selecting. Such as the Budget Transaction Detail report as shown above. From this screen you

would either choose an existing value, you had previously saved or add a new value if you are creating a new run control with different criteria. This would be the same process as the previous version of Finance prior to the upgrade.

If entering Accounts Payable vouchers online, you will find that your previous 'Personalizations' are no longer setup. You will need to set these up again when you are entering a voucher as follows:

1. Under the Distribution Lines section where the funding information is entered, click on the Personalize link and hide all categories not needed. The only categories you need when entering funding information is show below:

2. Select 'OK' to save your changes.