

# PeopleSoft 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.

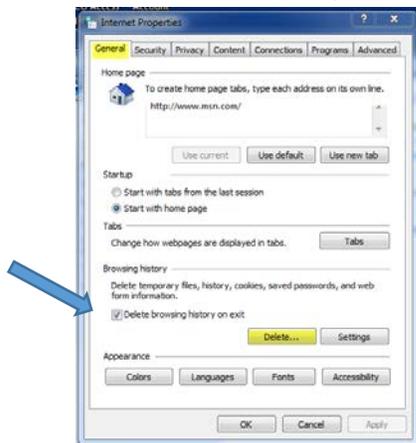
### 1. Clear Cache and Cookies in all browsers used prior to logging into PeopleSoft Finance.

#### Instructions for Internet Explorer:

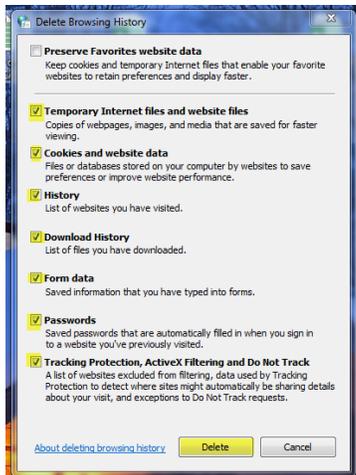
- Open up Internet Explorer and click on the 'Tools' icon in the upper right hand corner of your screen:



- 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'.



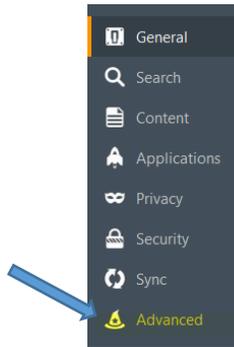
- Click 'Apply' and then 'OK' and close the Internet Options window. Close out of Internet Explorer and then reopen.

### Instructions for Firefox:

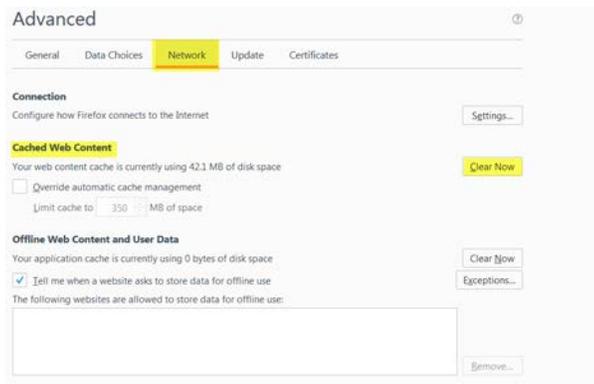
- Open up Firefox and click on the 'Open menu' icon in the upper right hand corner of your screen:



- 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'.



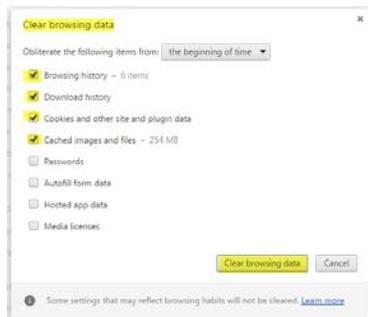
- Close out of Firefox and reopen.

### 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.

**Below is information from NDUS – Core Technology Services (CTS) on “Getting to Know Fluid”, which provides some information on the new navigation changes and menus.**

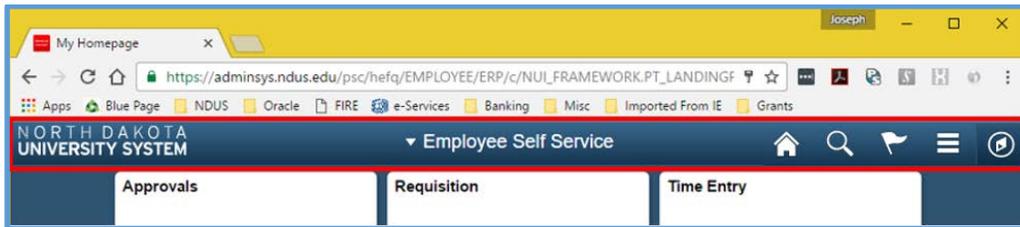
## Core Technology Services - Getting to know Fluid

Designed as a significant improvement over the PeopleSoft “classic” user interface, the PeopleSoft Fluid User Interface utilizes newer web-based technologies that will recognize the device that’s being used and auto-adjust the page layout and formatting—from large screen devices, such as laptops and desktops, to the reduced viewing space of tablets and smartphones. This will become more apparent when we start using Fluid pages.

**NOTE** – As of go-live (12/12/2016), we currently are not using any Fluid pages (with the exception of *My Preferences*); everything is still “classic”. We will look at gradually introducing Fluid pages in the near future, more than likely starting with the Expense module (possibly mid to late 2017), Supplier Registration (possibly mid to late 2017), and/or Payment Requests (possibly late 2017).

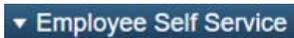
### Banner

The red highlighted area is referred to as the “banner”. This is essentially your menu bar.



Within the banner, there are 6 menu options. See the below table for a quick description on each menu item.

Additional information on the Actions List and NavBar are provided after the table below.



Homepage drop-down selection. When there are multiple homepages to which users have access, they switch to other fluid homepages using this drop-down list.



Home button. Use to return to the default homepage, which is the fluid homepage the user arrives at immediately upon sign-on.



Search button. Use to perform Global Search.



Notifications button. Displays the notification window showing any pending actions or alerts.



Actions List button. Use to display the actions menu based on the page you're viewing. Allows user to add/customize home pages and the navigation bar.

*\* Indicates that the menu option will differ depending on the page the user is currently viewing.*

\*Personalize Homepage (when viewing a Homepage): Allows the user to add, remove or move tiles within their Homepage(s).

\*Add to Homepage (when viewing a regular page): Adds a tile to the desired homepage, enabling the user to access the fluid page directly from the homepage.

\*Add to NavBar (when viewing a regular page): Adds a shortcut to the left-hand side of the NavBar, enabling access to that fluid page directly from the NavBar.

\*Add to Favorites (when viewing a regular page): Adds a link to the My Favorites node of the NavBar, as well as the Favorites list available in the classic PIA portal.

My Preferences: Modify settings that control a variety of options in the interface based on your preferences.

Help: Takes the user to the website that contains the UPK videos.

Sign Out: Signs the user out of their instance of PeopleSoft.



Navigation bar button (compass). Use to display the navigation bar ("NavBar"). Access additional navigational options.

## Actions List

### Personalize Homepage

While viewing a Homepage, the *Personalize Homepage* menu option will display. Click this to customize the tiles on your Homepage.

**NOTE** – You will first need to add pages/tiles to your “My Homepage” in order for it to be viewable. See the [Add To Homepage](#) section below for instructions.

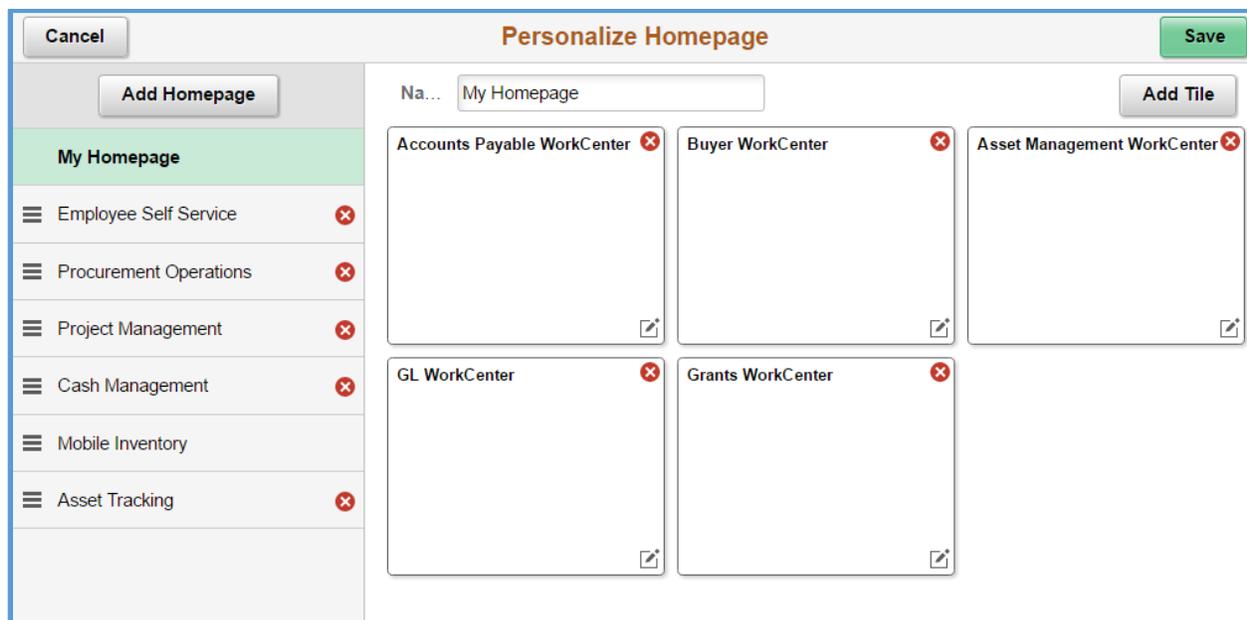
The left pane will display all of the homepages that are available to you. Since we are not currently using any other fluid pages, you will only see *Employee Self Service*, and possibly *My Homepage* (if/when you add pages to it). As more functionality becomes available, additional homepages will be accessible.

Drag and drop the homepages to rearrange them—the top one will be your default landing page (and also where you’ll be taken when clicking the  button).

The right pane displays the tiles/pages that are on the selected homepage. Drag and drop the tiles to rearrange them.

Click  to remove the homepage or tile.

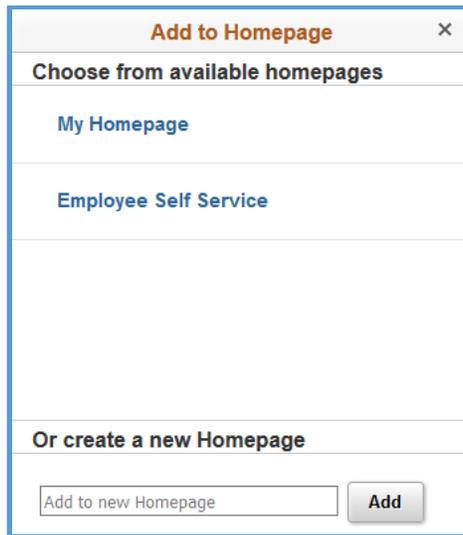
The **Add Tile** button is not going to have many options in it because we are not using Fluid pages at go-live. More options will be available as functionality becomes available.



### Add To Homepage

*Add to Homepage* will appear on all pages other than homepages. Click this option and then select which homepage you would like to add the page you’re on to—this will create a tile on that homepage.

You can also create and name your own homepage—this may be useful if you want to create homepages for different areas that you have access to rather than putting everything on one homepage (i.e. Accounts Payable, General Ledger, Grants, etc.). To do this, enter a title in the *Or create a new Homepage* section and click **Add**.



### Add To NavBar

*Add To NavBar* will appear on all pages other than homepages. Click this option to add the page you're on as a tile to the NavBar.



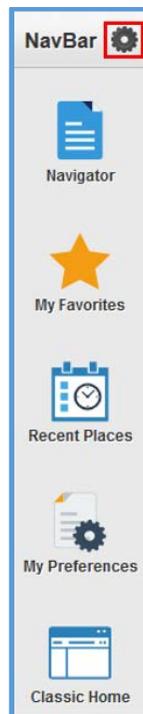
### Add To Favorites

*Add To Favorites* will appear on all pages other than homepages. Click this option to add the page you're on as an item in the *My Favorites* menu in the NavBar. You will be prompted to change the description for the title of the page, if you chose to do so.



## NavBar

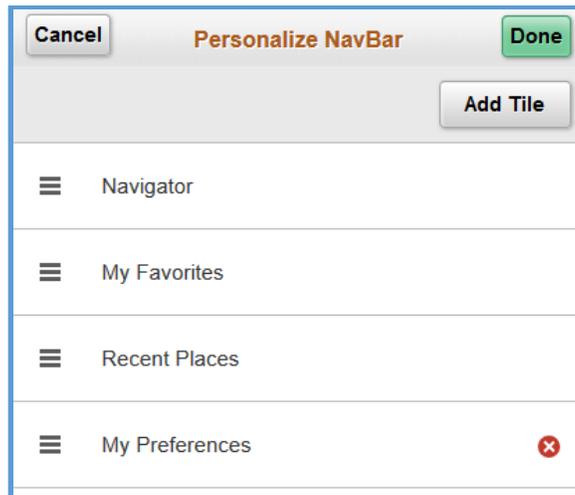
The *NavBar* is Fluid’s new menu—similar to the “bread crumbs” from our previous version, but with much more capabilities and versatility. After clicking the NavBar icon, a list of shortcuts is displayed. Click the Personalize NavBar icon  to edit these shortcuts.



Drag and drop the titles to rearrange their display order, or click  to remove it.

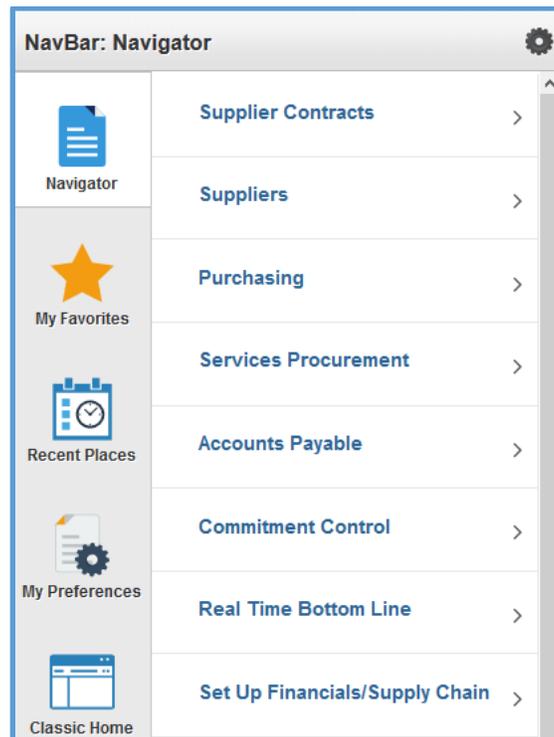
Click **Add Tile** to add delivered Fluid pages. Note that since we are not currently using any Fluid pages, the options are limited. More options will become available as we start using Fluid pages.

Click **Done** to save any changes.



## Navigator

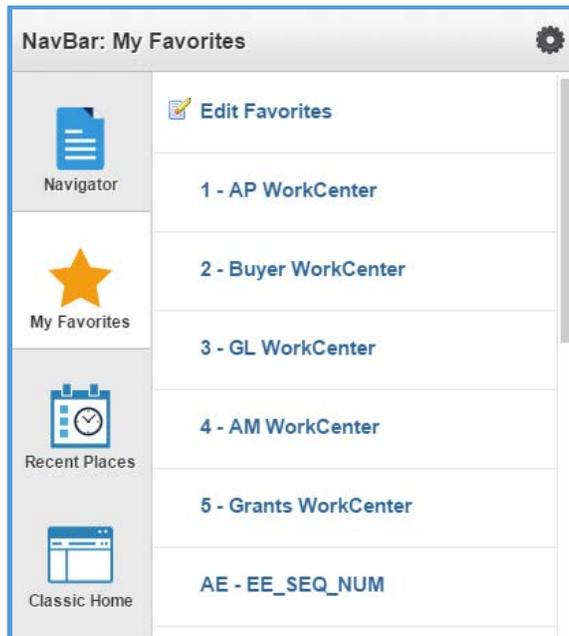
*Navigator* is the new Fluid “Main Menu.” The menu structure is the same order as it was in the classic view. At this time, we are not able to alphabetize this list like we could in the prior version. Future enhancements will allow this capability.



## My Favorites

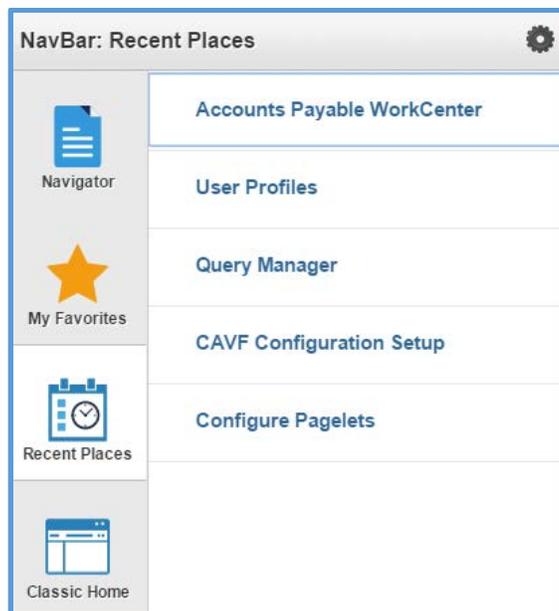
*My Favorites* is where your favorite shortcuts will appear. All of your favorites from the prior version will be located here, and also if you choose the “Add To Favorites” option from the Action List.

Click *Edit Favorites* to rename the title, or to change the order sequencing.



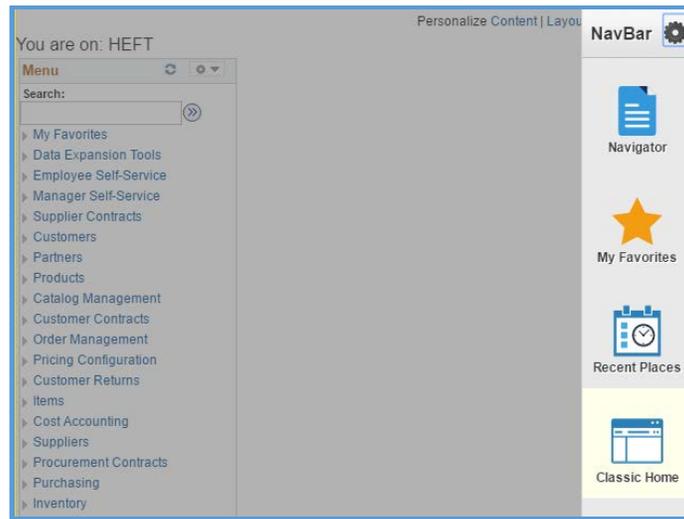
### Recent Places

*Recent Places* is similar to the “Recently Used” section at the top of the prior version’s Favorites menu. This lists the last 5 pages that you visited.



### Classic Home

*Classic Home* will take you back to the prior version’s Home landing page that you were brought to after first logging in. The “bread crumb” menu is no longer available with this version of PeopleTools, so using the *Classic Home* does not provide end users much of a benefit, unless you have personalized this page with different pagelets/dashboards (Contents).



## Example of adding a page to *My Homepage*

1. Navigate to the page you would like to add to *My Homepage*
  - a. NavBar  > Navigator > Accounts Payable > Accounts Payable WorkCenter
2. Click Actions List  > “Add To Homepage”
3. Select “My Homepage” from the *Add to Homepage* pop-up (or create a custom name at the bottom and then click Add).
4. Click OK on the confirmation message.
5. Click Home  --this should take you to your *My Homepage*, and new page (tile) that was just added should be viewable.
  - a. If you’re taken to *Employee Self Service*, click the drop-down button and select *My Homepage*.

## Example of changing your *default homepage*.

The *default homepage* will be your landing page when you first login, and where you’re taken when clicking the  button.

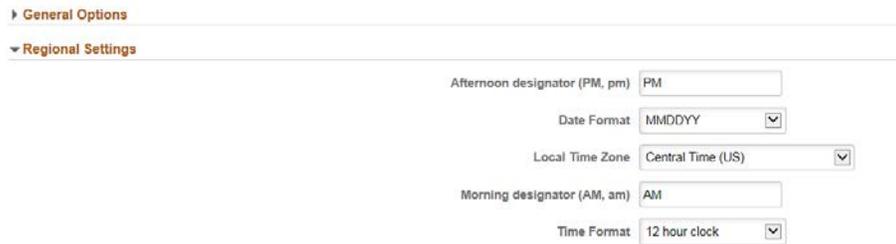
1. First, ensure that you are on one of the homepages (click  if you’re unsure).
2. Click Actions List  > “Personalize Homepage”
3. In the left-hand pane, the homepage listed at the top is your default homepage. Drag and drop the titles to rearrange their order; drag a different selection to the top for a new default homepage.
4. Click **Save** when you’re done.

## Additional setup may be required as follows:

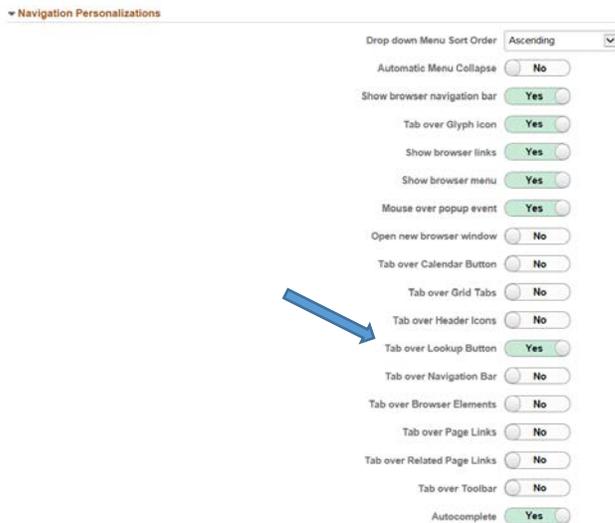
1. To set up your preferences click on the NavBar icon  and then click on 'My Preferences'.



2. Select 'Regional Settings' and set your screen to your time zone.

A screenshot of the 'Regional Settings' section in a web application. It features several input fields and dropdown menus: 'Afternoon designator (PM, pm)' set to 'PM', 'Date Format' set to 'MMDDYY', 'Local Time Zone' set to 'Central Time (US)', 'Morning designator (AM, am)' set to 'AM', and 'Time Format' set to '12 hour clock'. The section is titled 'Regional Settings' with a dropdown arrow.

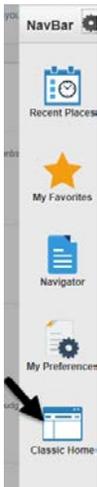
3. For those individuals entering invoices online in PSoft: Select 'Navigation Personalizations' and change the 'Tab over Lookup Button' to 'Yes'. Changing this option to yes allows you to not have to tab on the magnifying glass when entering a voucher.

A screenshot of the 'Navigation Personalizations' section. It contains a list of settings, each with a radio button or toggle. The 'Tab over Lookup Button' option is highlighted with a blue arrow and has its radio button selected (labeled 'Yes'). Other options include 'Drop down Menu Sort Order' (Ascending), 'Automatic Menu Collapse' (No), 'Show browser navigation bar' (Yes), 'Tab over Glyph icon' (Yes), 'Show browser links' (Yes), 'Show browser menu' (Yes), 'Mouse over popup event' (Yes), 'Open new browser window' (No), 'Tab over Calendar Button' (No), 'Tab over Grid Tabs' (No), 'Tab over Header icons' (No), 'Tab over Navigation Bar' (No), 'Tab over Browser Elements' (No), 'Tab over Page Links' (No), 'Tab over Related Page Links' (No), 'Tab over Toolbar' (No), and 'Autocomplete' (Yes).

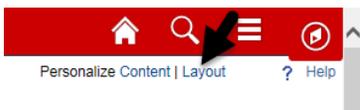
4. You must click 'Save' in the upper right hand corner of the screen to save these changes.



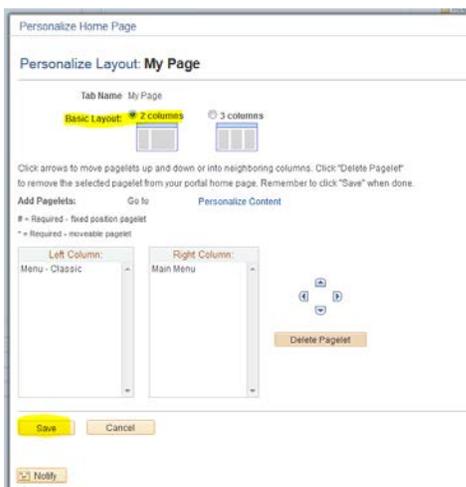
- In addition, the breadcrumbs view that used to appear at the top of the page is no longer available in this new layout. If you are unsure of where to find the page you need, click on the 'Classic Home' view found in the NavBar section



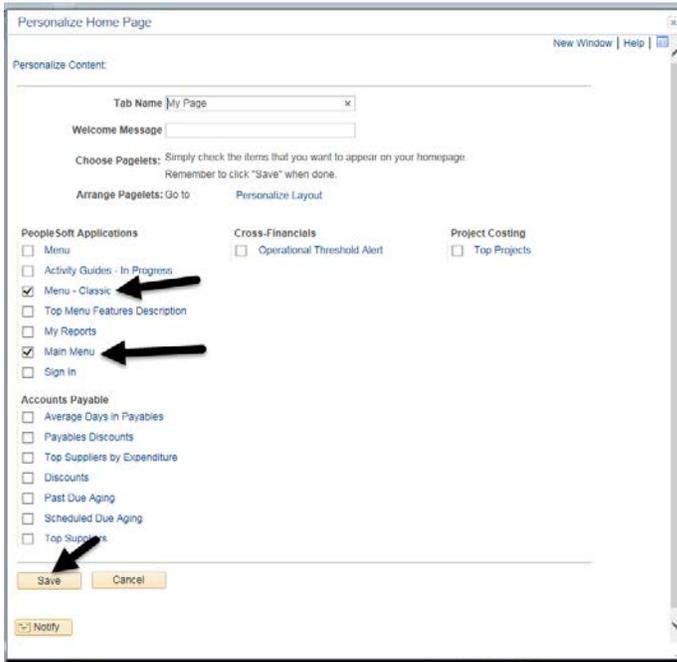
- Select the 'Layout' link in the upper right hand corner of the screen, to bring you to the Personalize Layout page.



- Select the '2 columns' option and then click 'Save'.



8. Then select the 'Content' link  to access the Personalize Content page and select the 'Menu-Classic' and 'Main Menu' options as shown below and then click on 'Save' to save your selections.



9. This is what your screen should look like.

