Presenters

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• Timeline
• Classic vs. Fluid
• Navigating through Fluid
• Modules
• Approvals
• Demonstration
Timeline

• October 9 through October 25: Testing
• November 18 through December 6: Testing & Training
• December 9: Live in Production
# Classic vs. Fluid User Interface (UI)

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<tr>
<th>Classic</th>
<th>Fluid</th>
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<td>Global Search is on Menu Bar</td>
<td>Global Search is on Fluid Header</td>
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Benefits of Fluid

• Tiles replace breadcrumbs
  • Easier navigation to pages
• Mobile access
• Ability to leverage new features from PeopleSoft

NOTE: The tiles available are based on each person’s security and may be different from the ones you see during this presentation.
Logging In

• Signing in to PeopleSoft will not change
Classic PeopleSoft
Fluid PeopleSoft
Home / Landing Page
Navigation

• There are two ways to navigate to pages in FLUID
  • Center Navigation and Tiles
  • NavBar
Center Navigation

- Allows a person to navigate to a group of related tiles
Tiles allow a person to navigate to a page.
• PeopleSoft Fluid allows a person to go back a page to the module landing page.
Compass / NavBar

- Recent Places

- My Favorites
  - Favorites will not transfer to Fluid and will need to be recreated
  - BIS recommends writing down your favorites and navigation prior to December 6

- Navigator
Adding Favorites

• Navigate to the page using the Tiles or NavBar
• Click on the three vertical dots and select “Add To Favorites”
The Navigator button is similar to the current “Main Menu” and allows a user to navigate to a page.

The Navigator is used to navigate to all pages, including those that do not have a tile.
Navigator

- The left arrow button on the Navigator will bring you back one level.
- The up arrow button will take you back to the primary Navigator page.
• The Home Button will take you to the most recent Landing Page you visited
• Clicking the Home Button twice will return you to the Home/Landing page
Search

- The search function allows you to search a keyword to navigate to a page
Notifications (Document Approvals)

- The flag will take you to any notifications you have pending.

- If there is a number in a red oval on this icon, you have unread notifications.
Travel & Expense

• Redesigned Navigation Bar
• New Travel Authorization & Expense Reporting User Interfaces
• Expense Report Data Analytics
• Print Preview inside of Expense Report
• Delivered Configurable Expense Certification
• Expense Report Withdrawal
• User Friendly Approval Workflow Train
• Approval Workflow
  • Classic Approval View
  • New Fluid Approval View
• Enhanced Cash Advance
Accounts Payable

- Fluid Design - Tile Navigation
- Home/Landing Page for Accounts Payable
- Accounts Payable Work Center – COMING SOON
- Additional Voucher Entry Fields
- Keyword Search / Advanced Search
- Redesigned Voucher Information Page
- Totals Calculator
- Supplier 360
- Voucher Entry Template List
- Match Exception History and Analysis
- Visual Display of PO ID selected on Voucher page
Accounts Payable

- Financials Approvals
- Voucher Entry
- Matching Workbench
- Pay Cycle Manager
- Voucher Build
- Supplier Inquiry
- Review Purchase Order
Rowdy Exchange

• There will be a tile on the Landing Page that will take you to Rowdy Exchange

• Rowdy Exchange will not change with this upgrade to PeopleSoft
Procurement Operations

- Procurement Home Page and Fluid Tiles
- Redesigned Navigation Bar
- Vendor Audit Framework by Business Unit
- Document Life Cycle added to Purchase Order View
- Keyword Search for PO
- User-Definable Fields in Purchase Order
- Pro-Card supports 5900 transaction type (refunds)
Procurement Operations

UTSA will continue to use Rowdy Exchange to create requisitions
Commitment Control (Budget)

- Budget Transfer Workflow Approval – COMING SOON
- Custom Commitment Control Work Center – COMING SOON
- Tile Navigation
- Navigation Collections
- Default Commitment Control Ledger Group through User Preferences
- ChartField Descriptions in Budget Overview
- Custom Cost Center field as Speedtype in Budget Journal Pages
- Custom Descriptions of Department ID, Cost Center, and Project ID in Budget Transfer Approval Page
Commitment Control (Budget)
Asset Management & Capital Expenditures

• Asset Management Custom Workflow – COMING SOON
• Asset Management Work Center – COMING SOON
• Tile Navigation
• User Attribute fields on Asset Basic Add Page
• Asset Review Physical/Financial Page – Combined into one page
Asset Management & Capital Expenditures

- Asset Management WorkCenter
- Search for an Asset
- Asset Interface Transactions
- Asset Transactions
- Asset UT Customizations
Accounting & Financial Reports

• Tile Navigation
• Custom Monthly Reconciliation/Certification Application (MFR)
• Custom Semi-Annual Certification Application
Accounting & Financial Reports

- Journal Inquiry
- GL Reporting
- Journal Approvals
- Budgets Overview
Program Mgmt, Billing & AR

- Fluid Feel (Homepages, Tiles, Navigation collections, Navigation bar)
- Grant Work center and Reporting
- Retroactive Facilities and Admin Enhancement
- New Features for LOC Contracts
- Enhanced Supplemental Data
- Contracts Sponsor Update
- Manager Tab Update
- Modify End Dates
- Award Copy Terms
Project Costing

- Fluid Homepages/tiles/navcollections/NavBar
- Work Centers – COMING SOON
- Dashboards
- Project Reconciliation Workbench
- Feeder and Pricing Summarization – PROJRESOURCE
- PeopleSoft Receivables 9.2 extends the AR to PC integration by interfacing AR direct journals to Project Costing
- The Crystal Reports tool is replaced with BI Publisher versions of the reports
Billing

• Fluid Homepages/tiles/navcollections/NavBar
• Billing Work Centers – COMING SOON
• Billing Dashboards
• Correcting Interface Errors for Multiple Billing Lines
• LOC Management -Enhancements
• Enhancements/Customizations to Invoice Reports SF-270
• Manager Transaction Review
• Non Sponsored Billing not in use in 9.1
Accounts Receivable

• Fluid Feel (Homepages, Tiles, Navigation collections, Navigation bar)

• Receivables Work Center & Manager Dashboard

• Collections Workbench & Customer Hierarchy
  • Contract supports
  • Aging & Dunning Enhancements

• Integration with Projects

• Payment & worksheet enhancements
  • Apply Payment Enhancements
  • Partial Payment Unpost
  • Maintenance enhancements
Program Mgmt, Billing & AR

- Billing
- Receivables
- Grants & Contracts
- Capital Projects
- Reporting
Treasury

- Fluid Landing Page for Treasury Operations
- Enhanced Automatic Reconciliation Options
- Manage Reconciliation Rules by Source Transaction Type
- Assign Reconciliation Rules by Bank Account
- Group Bank & System Side Transactions
- Parse Addenda Information for Reconciliations (New Data Export Import Utility)
- New System for Reviewing Cash Positions
- Ability to Reverse Treasury Accounting Entries
Treasury

- Journal Inquiry
- GL Reporting
- Treasury Operations
- PeopleSoft GL Reports
- Custom GL Reports
Approvals

- The Approvals tile is on the Home Page and Landing Page for the modules that have workflow (Travel and Accounts Payable)

A number in the lower right corner indicates a document is waiting for approval.
Approvals

• Approvers can select the type of document they wish to see or can see all on one page.
Approvals

- Approvers can Approve, Terminate, Send Back or Hold the document
Sign Out

• Click on the three vertical buttons in the upper right corner and select Sign Out
Demonstration
Drop In Labs

• For hands-on experience, stop by one of our drop-in labs
• Financial Affairs Training Room (NPB 1.412)
• Thursday, December 5
  • 8:30-11:30
  • 1:30-4:30
• Friday, December 6
  • 2:00-4:30
FLUID Informational Website

• utsa.edu/bis/psupgrade/

Coming Soon: PeopleSoft 9.2 User Interface Updates Launches December 9

Prep Yourself for the Upcoming PeopleSoft 9.2 User Interface Updates

It is not too late to register for informational, overview and hands-on sessions on PeopleSoft 9.2 user interface updates. We are still on schedule for a December 9 launch date, so make sure you sign up for a session.

These sessions are designed for anyone who creates or approves any financial or HR related documents (see the list below for FMS or HCM information covered in each session). We will provide an overview and guide you through the next steps to prepare you for changes you will see in PeopleSoft. Our information sessions are the perfect opportunity to gain knowledge of the new updates before the launch date.

“FLUID” provides a visual interface that uses tiles and navigation (nav) bar to navigate within PeopleSoft. This aspect makes it more visually appealing and easy to find your tasks. Additionally, FLUID allows us to provide wider accessibility across various electronic devices (desktops, tablets and mobile phones) and sets the university up to improve processes and functionality that affect UTSA faculty and staff.
PeopleSoft 9.2 Fluid will be live on Monday, December 9
Questions?