Welcome!

Please login using the following navigation to access the PeopleSoft training system.

• Type in www.utsa.edu/bis in the URL of Google or Firefox.

• Click on the Resources link in the gray box on the left hand side of the page.

• Click on the TRN Portal link. Sign in using your ABC123 and password.
PeopleSoft HCM
Fluid User Interface and PeopleSoft Update Manager (PUM) Training
Agenda

• Introducing Fluid User Interface and PeopleSoft Upgrade Manager (PUM)
• Overview of the Fluid User Interface
• New Navigation for UTSA End-Users
  • Employee and Manager Self Service
  • eForms Requesters and Approvers
  • Department Administrators
  • Timekeepers
• LABs – Assistance after Implementation
• Contact Information
• Questions
What is Changing?

• The Navigation
Why are We Making these Changes?

- PeopleSoft Upgraded in 2019
  - Provided enhancements to vouchers, expenses, and authorizations in the Financial Management Suite (FMS); not much changed in the Human Capital Management Suite (HCM)
  - Set the university up to improve processes and functionality that affect UTSA faculty and staff

- Fluid User Interface facilitates the User Experience
  - Easier navigation and improved accessibility across various electronic devices (desktop, tablets, phones)

- PeopleSoft Update Manager (PUM)
  - New version of PeopleSoft with enhanced features to benefits UTSA and other UT System academic institutions that share PeopleSoft
  - Allows for more frequent updates/fixes resulting in improvement to business processes
Overview of
PeopleSoft Fluid User Interface
## New Terminology - Classic Menus vs Fluid UI

<table>
<thead>
<tr>
<th>Classic</th>
<th>Fluid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Page Tabs</td>
<td>Landing Pages</td>
</tr>
<tr>
<td>Navigational Links</td>
<td>Tiles</td>
</tr>
<tr>
<td>Menu “Breadcrumb” Navigation</td>
<td>NavBar</td>
</tr>
<tr>
<td>Pixel Perfect Page Design</td>
<td>Fluid Personalization</td>
</tr>
<tr>
<td>Global Search is on Menu Bar</td>
<td>Global Search is on Fluid Header</td>
</tr>
<tr>
<td>N/A</td>
<td>Fluid Personalization</td>
</tr>
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</table>
Current ‘Classic’ Home Page
New Fluid Home Page

Landing pages bring together information relevant to a specific role.

- Access multiple Homepages
- Create Personal Homepages
Home: New Concept – Landing Pages

• The default Landing Page is Employee Self Service
• Two primary Landing Pages: ESS and MSS
Landing Pages: New Concept - Tiles

- Tiles act like buttons
- Tap a Tile to go to an Application page
- Also known as Pagelets or Navigation Collection
Tiles: New Concept – Navigation Collection

<table>
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<tr>
<th>Check Date</th>
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<th>Net Pay</th>
<th>Paycheck Number</th>
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<td>08/01/2019 / 08/31/2019</td>
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Using Fluid Homepage Controls

- Home
- Search
- Notifications
- Actions List
- NavBar
Using Fluid Homepage Controls (continued)

Home

Search
Using Fluid Homepage Controls (continued)

Notifications

Action List
Using Fluid Homepage Controls (continued)

 NavBar

 Recent Places

 My Favorites

 Navigator

 Approvals

 Classic Home
Actions List: Personalization - Favorites

### Paychecks

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</tbody>
</table>
Device Functionality: Desktops

PeopleSoft Fluid Enables Mobility on Any Device
Device Functionality: Tablets

Tablet (Portrait)

Notice How the Left Panel Slides Away.

If the Left Panel Needs to Be Accessed to Switch Categories, It’s Just a Simple Click Away.

Left Panel Slides Away

Tablet (Portrait) - Left Panel

By Clicking the Tab on the Left, the Information that is Visible By Default is Displayed.
Device Functionality: Smart Phone

On a smartphone, the Back-button changes to an icon.
Navigation for UTSA End-Users
Employee Self Service Navigation
Employee Self-Service Landing Page - Tiles

- Tiles act like buttons
- Tap a Tile to go to an Application page
- Also known as Pagelets
Payroll and Compensation: Navigation Collection
Pay: Page
Employee Self-Service: Landing Page
Personal Details: Navigation Collection
Change Address
Manager Self Service Navigation
Manager Self-Service Landing Page
Manager Self-Service: Landing Page
Manager Self Service: Navigation Collection
eForms Navigation
eForms Requestor: Employee Self Service Landing Page
eForms Requester: Navigation Collection
eForms Requester: Navigation Collection
eForms Approver: Employee Self Service Landing Page
eForms Approver: Navigation Collection
Department Admin Navigation
Department Administrator: NavBar Navigation
Timekeeper Navigation
Timekeeper: Workforce Administrator Landing Page
Timekeeper: Navigation Collection
Navigation to HCM Reporting
Navigation to HCM Reporting
Navigation to HCM Reporting
LABs – Assistance after Implementation

• 12/10/2019  Financial Affairs Training Room NPB 1.412  9am – 12pm
• 12/13/2019  Financial Affairs Training Room NPB 1.412  1pm – 4pm
• 01/07/2020  Downtown Campus  DB 2.222  1pm – 4pm
• 01/10/2020  Financial Affairs Training Room NPB 1.412  9am – 12pm
• 01/16/2020  Financial Affairs Training Room NPB 1.412  9am – 12pm
Contact Information:

Business Information Services
210-458-SPOC (7762)
www.utsa.edu/BIS
https://spoc.kayako.com/conversation/new