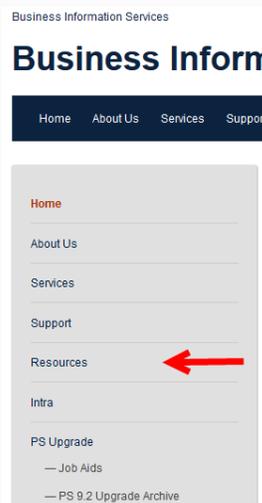# Welcome!
Please login using the following navigation to access the PeopleSoft training system.

- 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
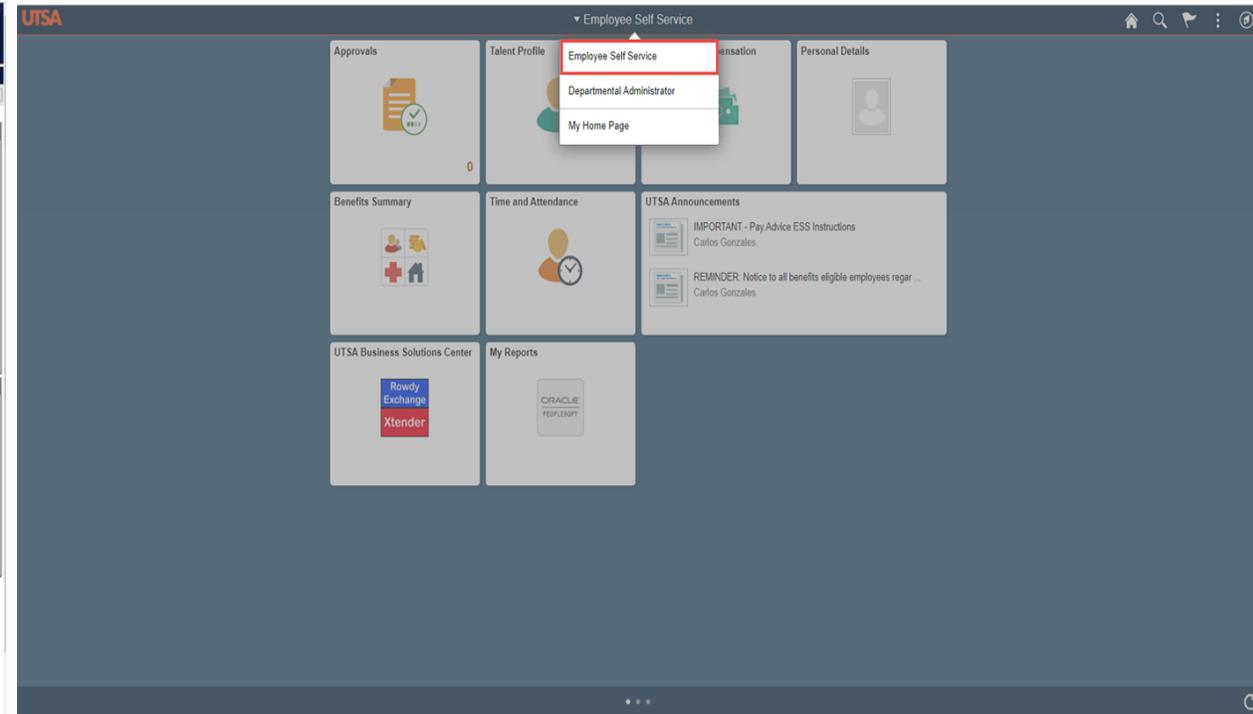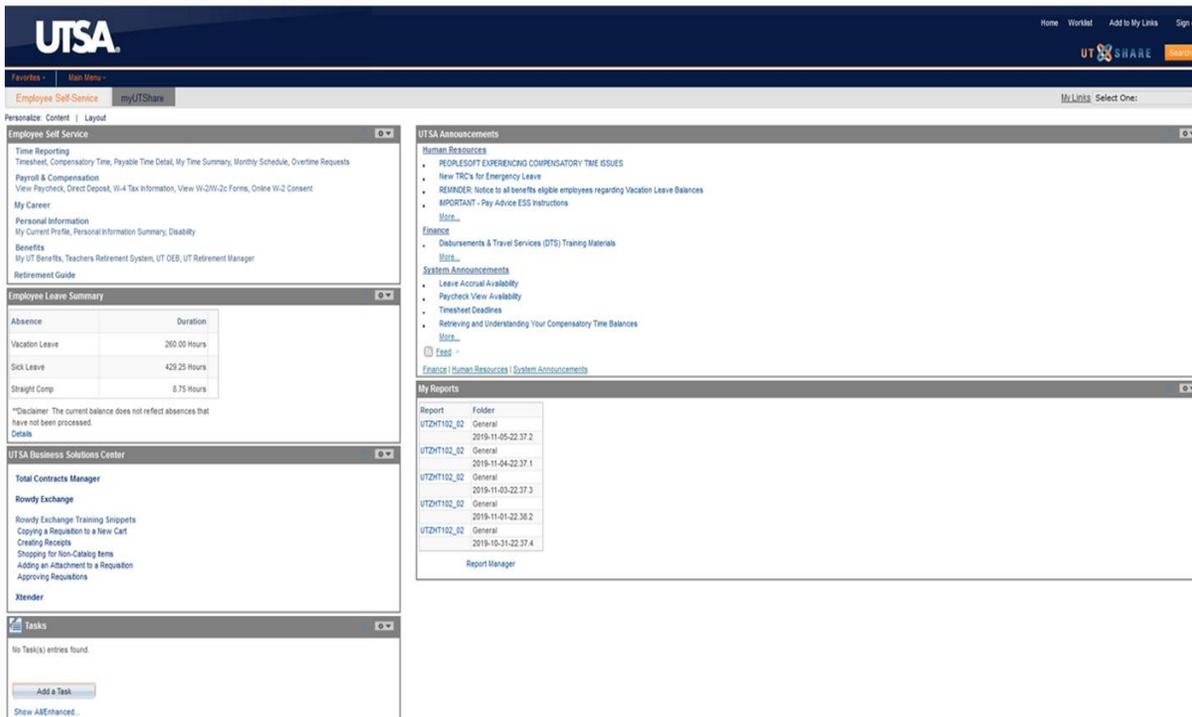
Why are We Making these Changes?

- 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

Classic	Fluid
Home Page Tabs	Landing Pages
Navigational Links	Tiles
Menu "Breadcrumb" Navigation	NavBar
Pixel Perfect Page Design	Fluid Personalization
Global Search is on Menu Bar	Global Search is on Fluid Header
N/A	Fluid Personalization

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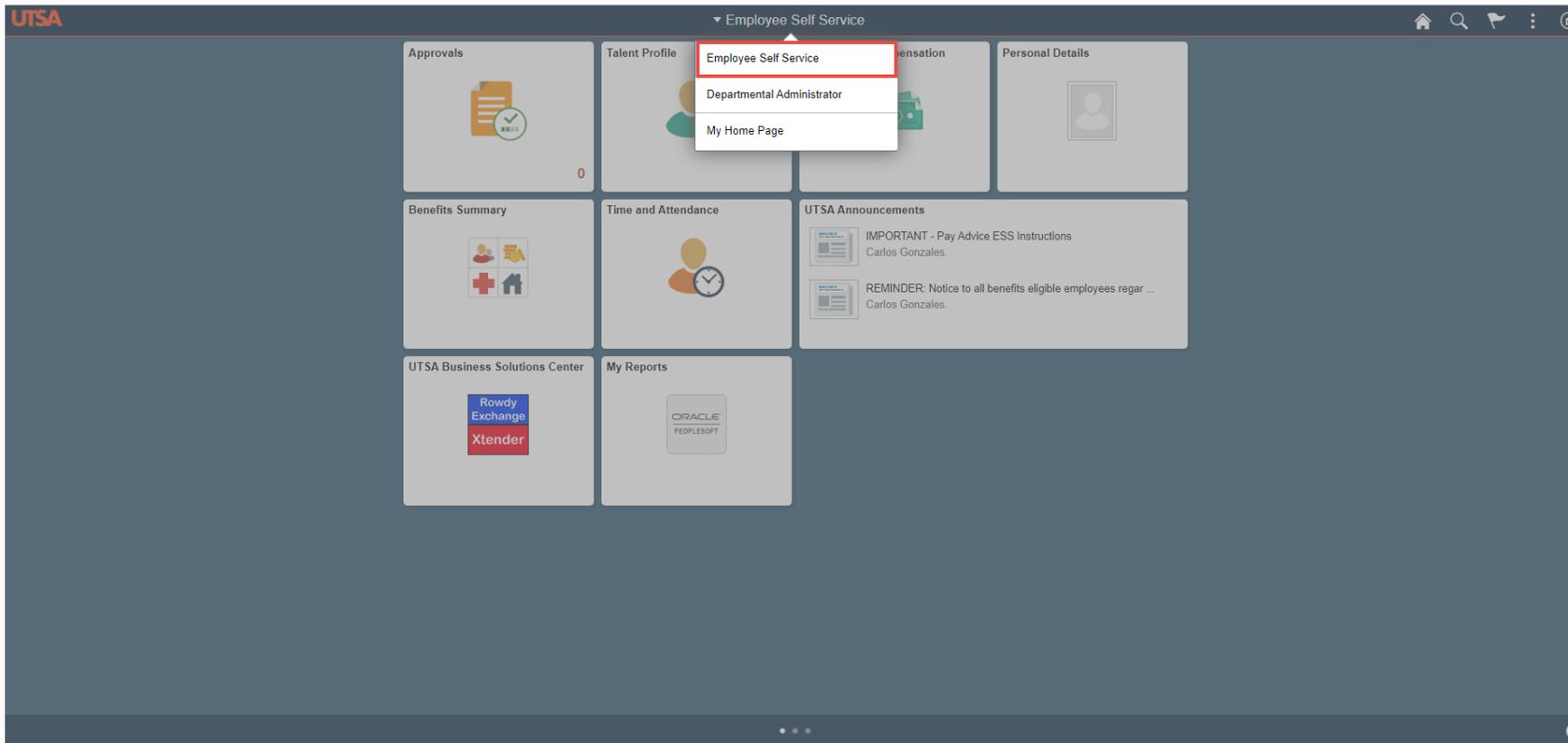
- The default Landing Page is Employee Self Service
- Two primary Landing Pages: ESS and MSS

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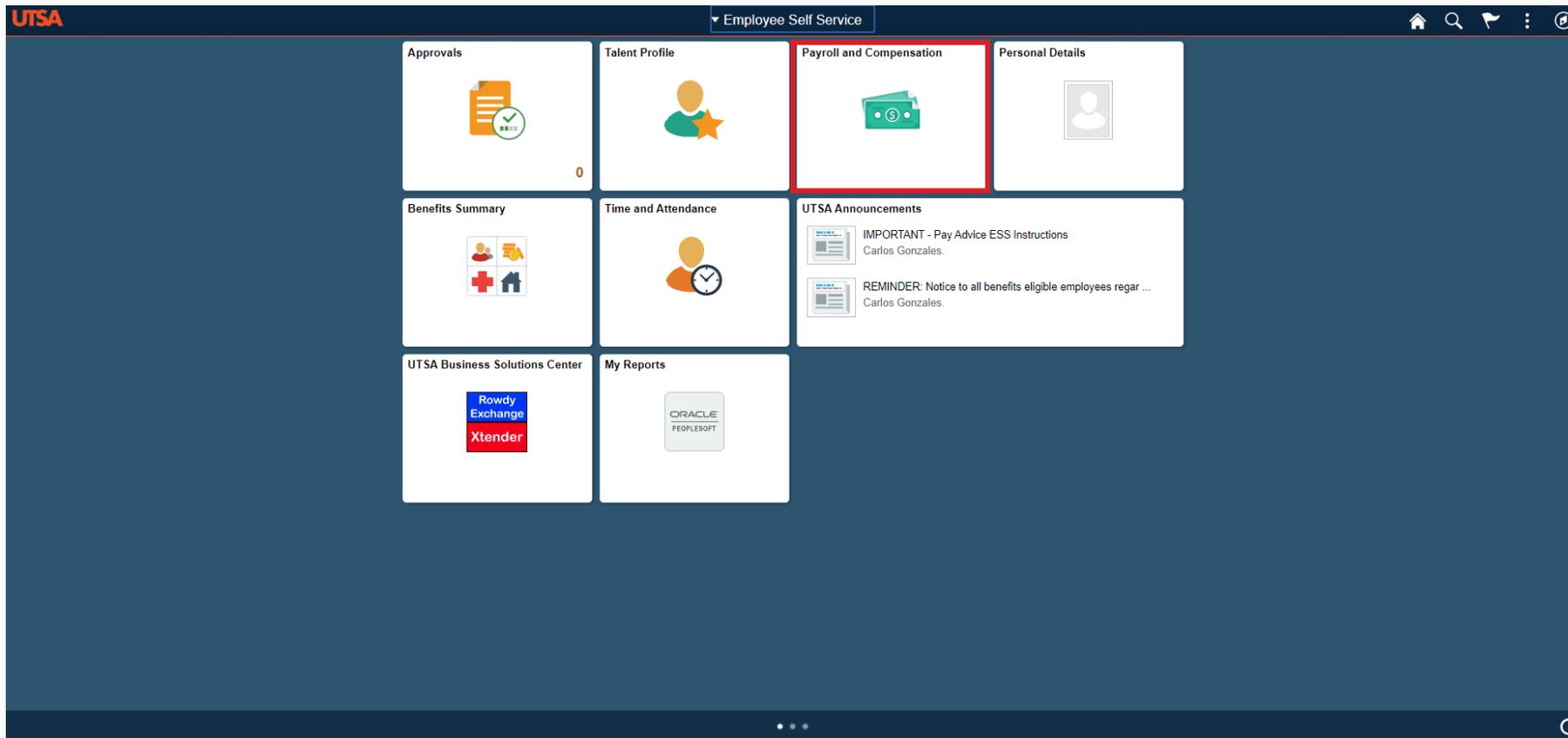
- Tiles act like buttons
- Tap a Tile to go to an Application page
- Also known as Pagelets or Navigation Collection

Tiles: New Concept – Navigation Collection

Using Fluid Homepage Controls

▼ Employee Self Service

Home

Search

Notifications

Actions List

NavBar

Using Fluid Homepage Controls (continued)

Home
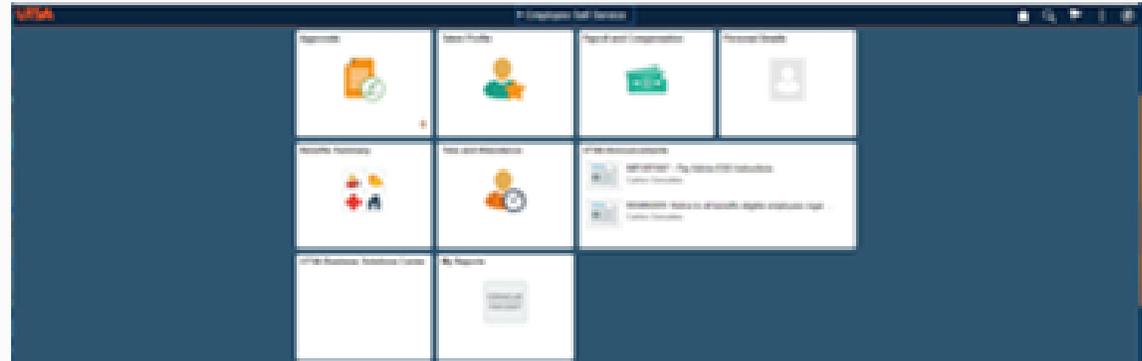
Search
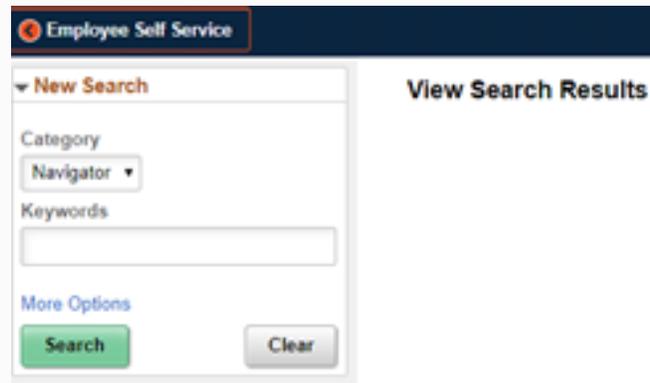
Using Fluid Homepage Controls (continued)

Notifications
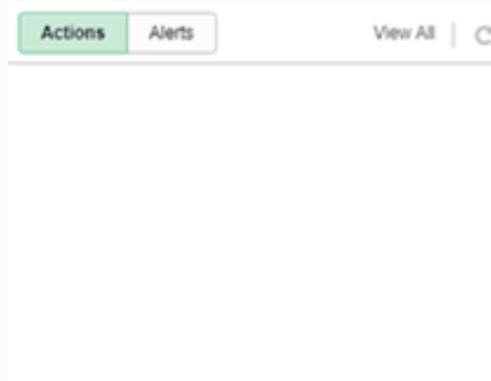
Action List
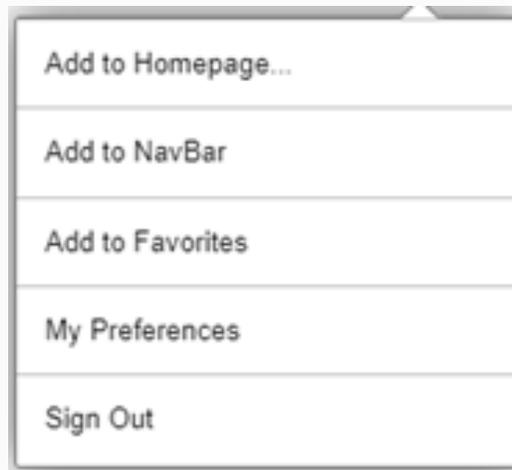
Using Fluid Homepage Controls (continued)

NavBar
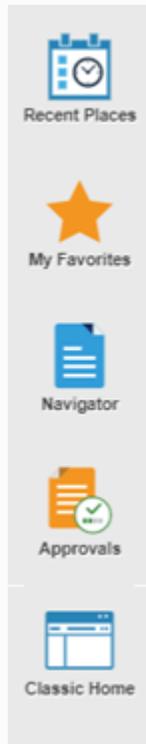
Recent Places

My Favorites

Navigator

Approvals

Classic Home

Actions List: Personalization - Favorites

Device Functionality: Desktops

PeopleSoft Fluid Enables Mobility on Any Device

Device Functionality: Tablets

Tablet (Portrait)
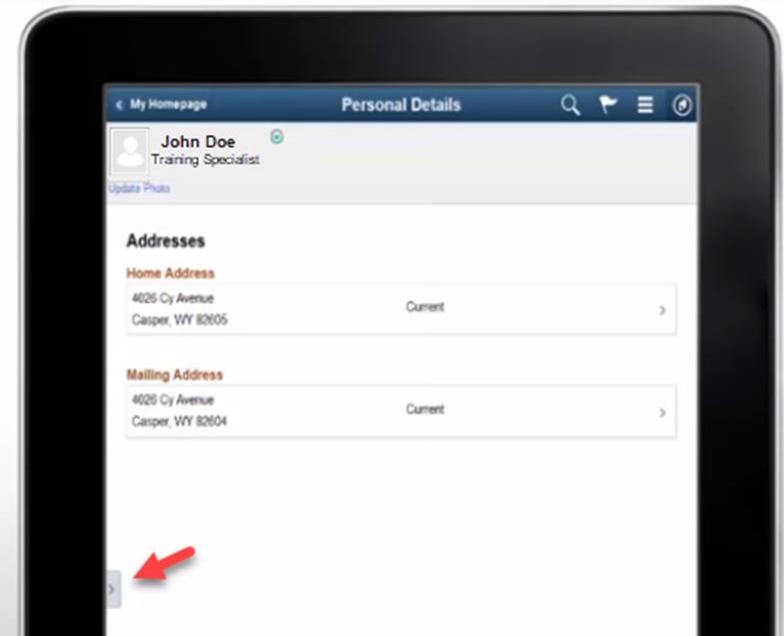
Notice How the Left Panel Slides Away.

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
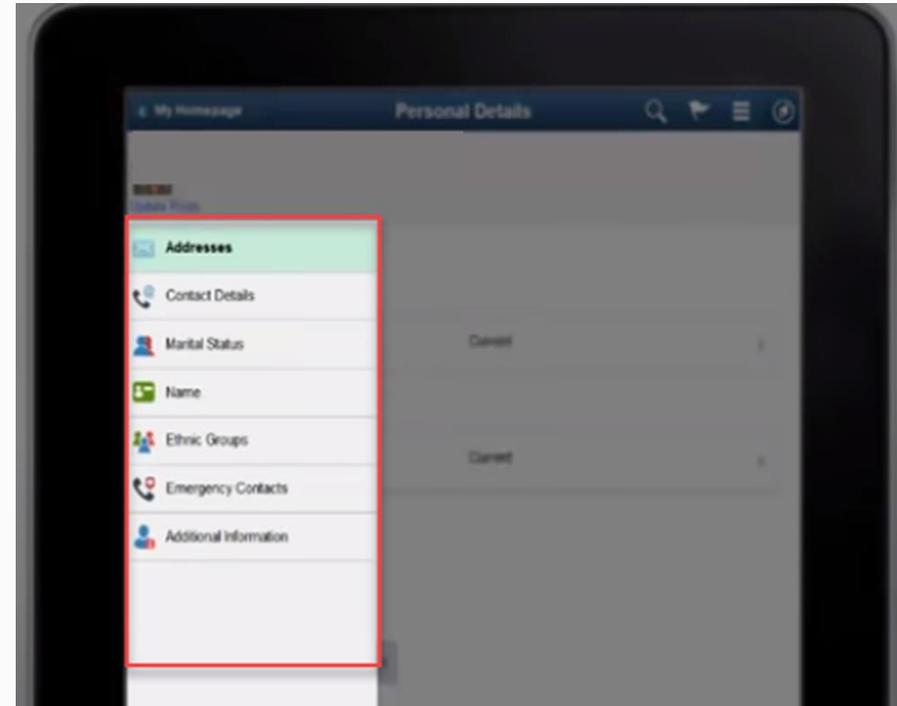
By Clicking the Tab on the Left, the Information that is Visible By Default is Displayed.

Device Functionality: Smart Phone
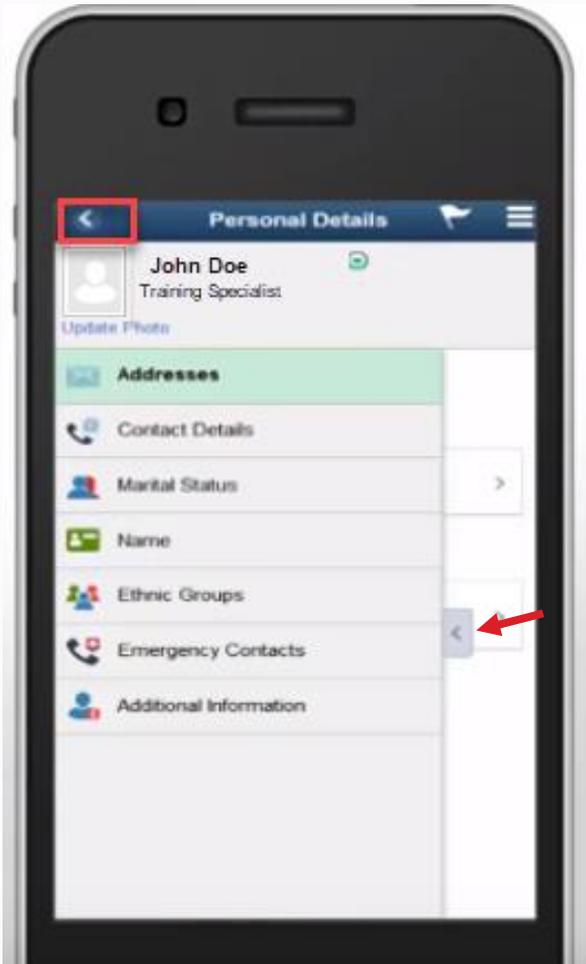
On a Smart phone the Back-button Changes to an Icon

Navigation for UTSA End-Users

Employee Self Service Navigation

Employee Self-Service Landing Page - Tiles
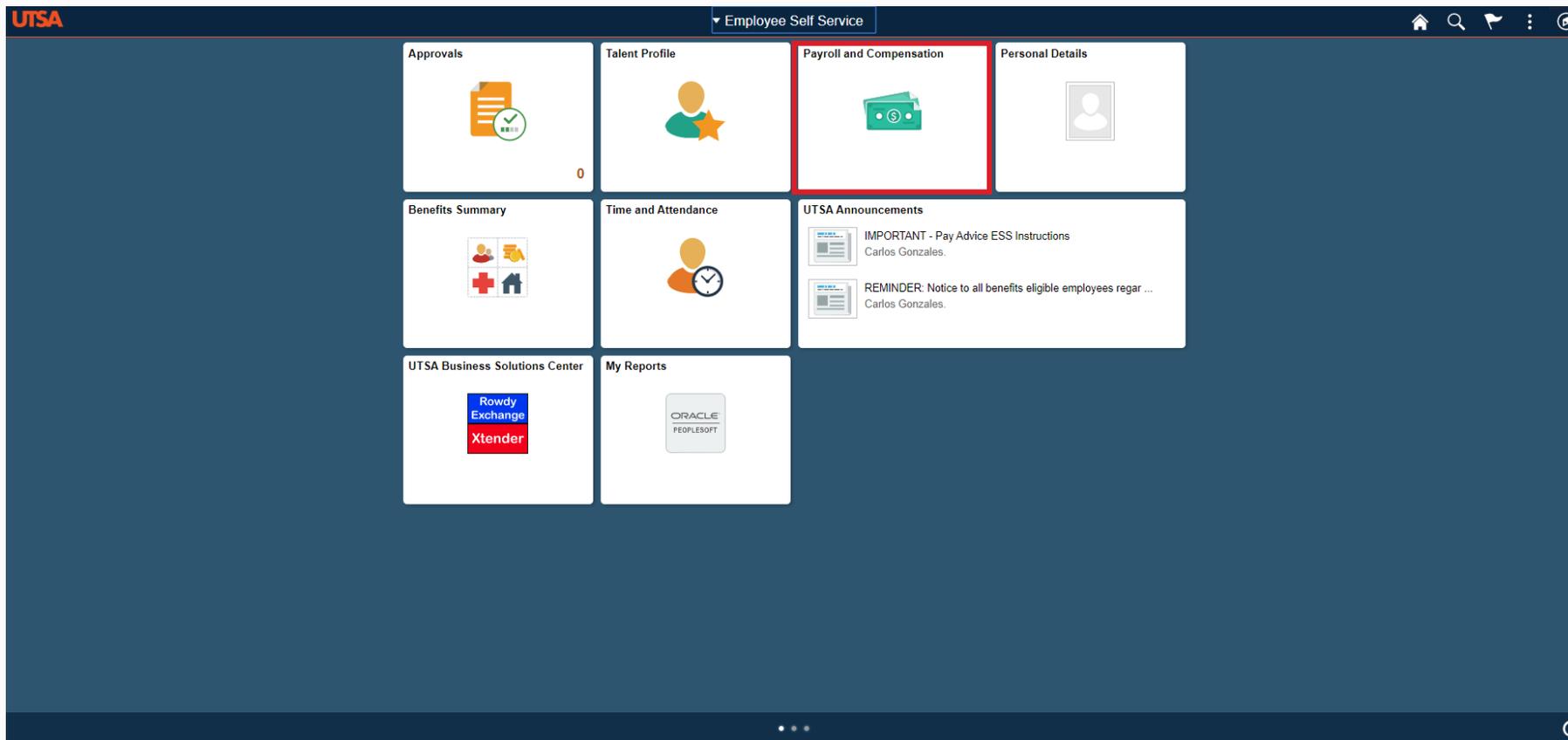
- Tiles act like buttons
- Tap a Tile to go to an Application page
- Also known as Pagelets

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
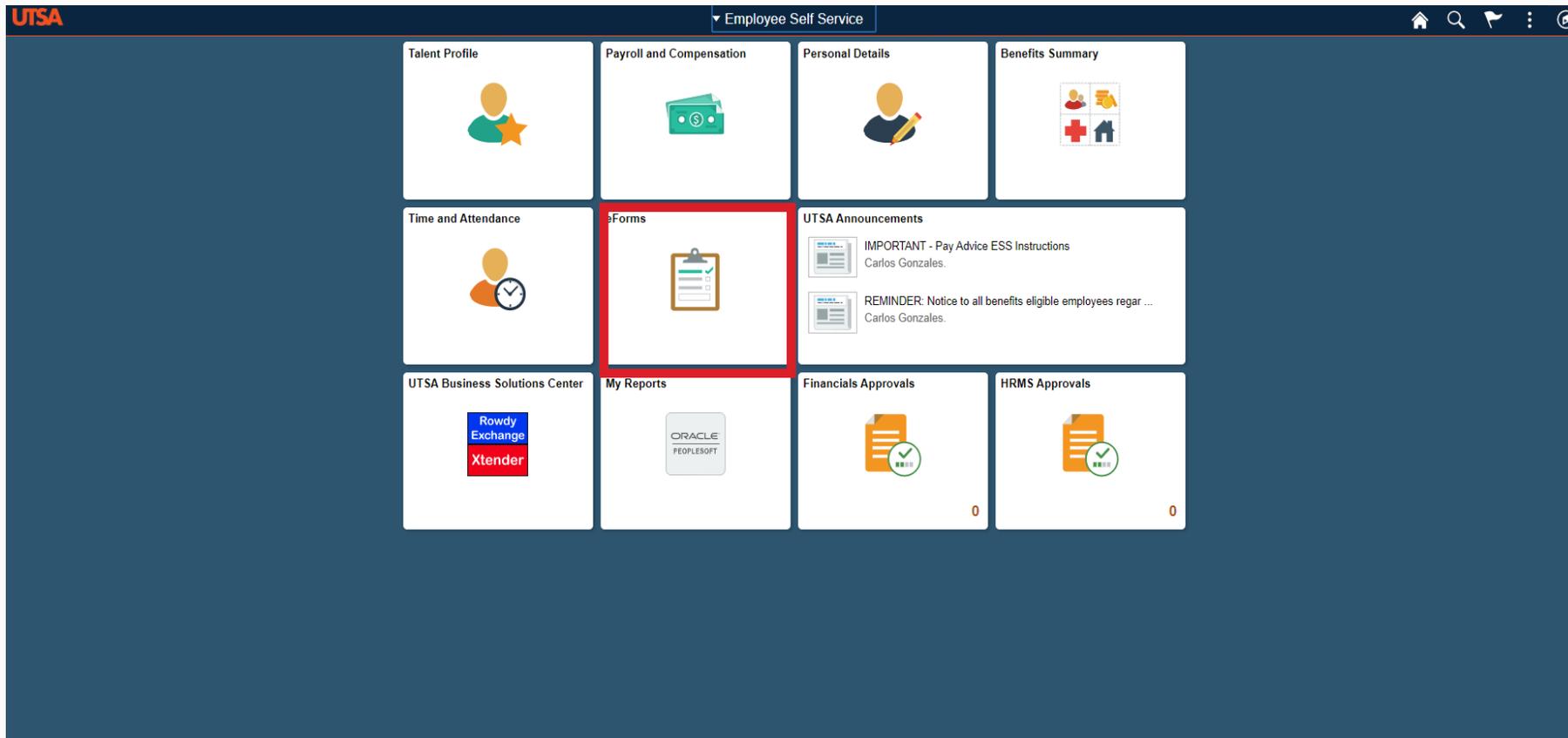
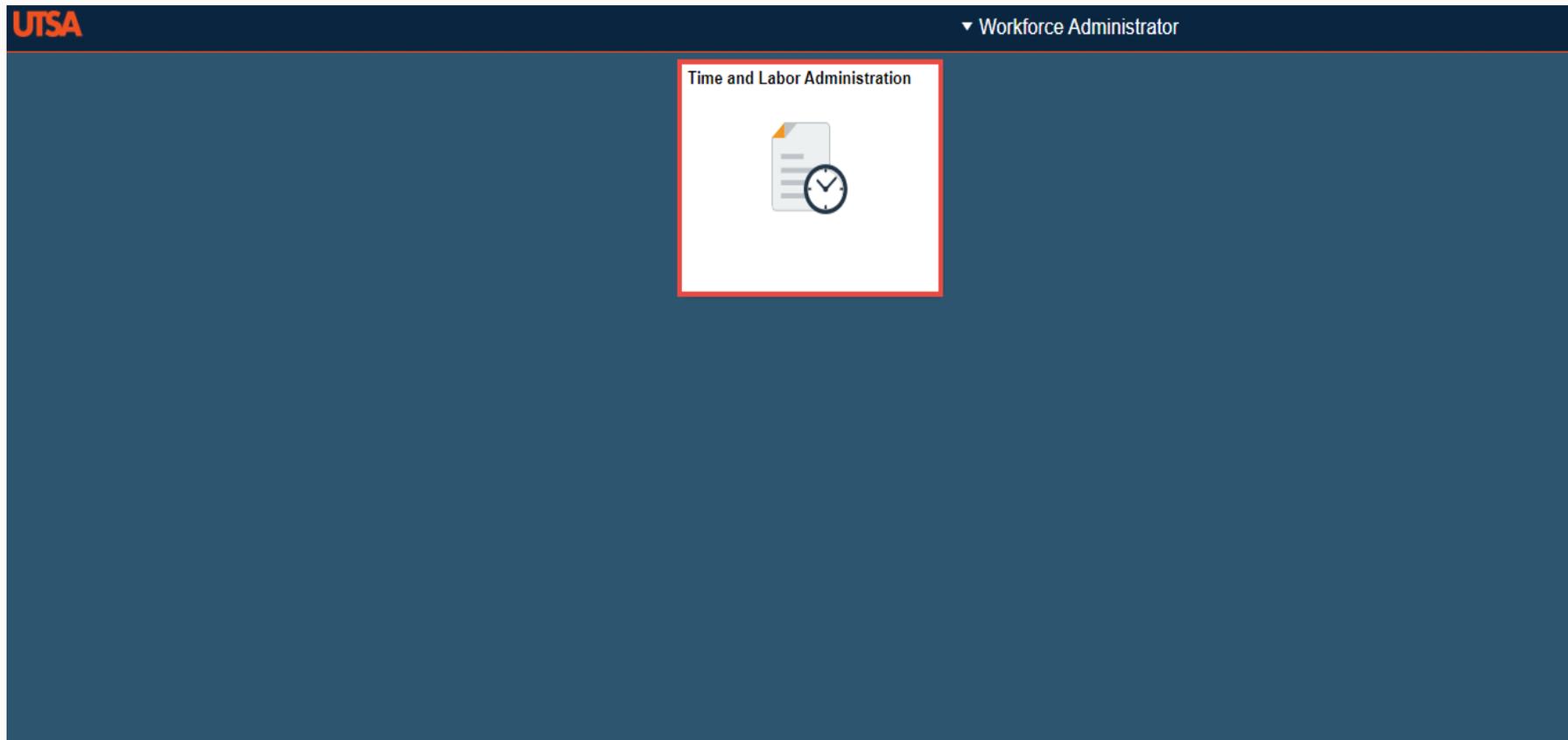# eForms Approver: Navigation Collection

Department Admin Navigation

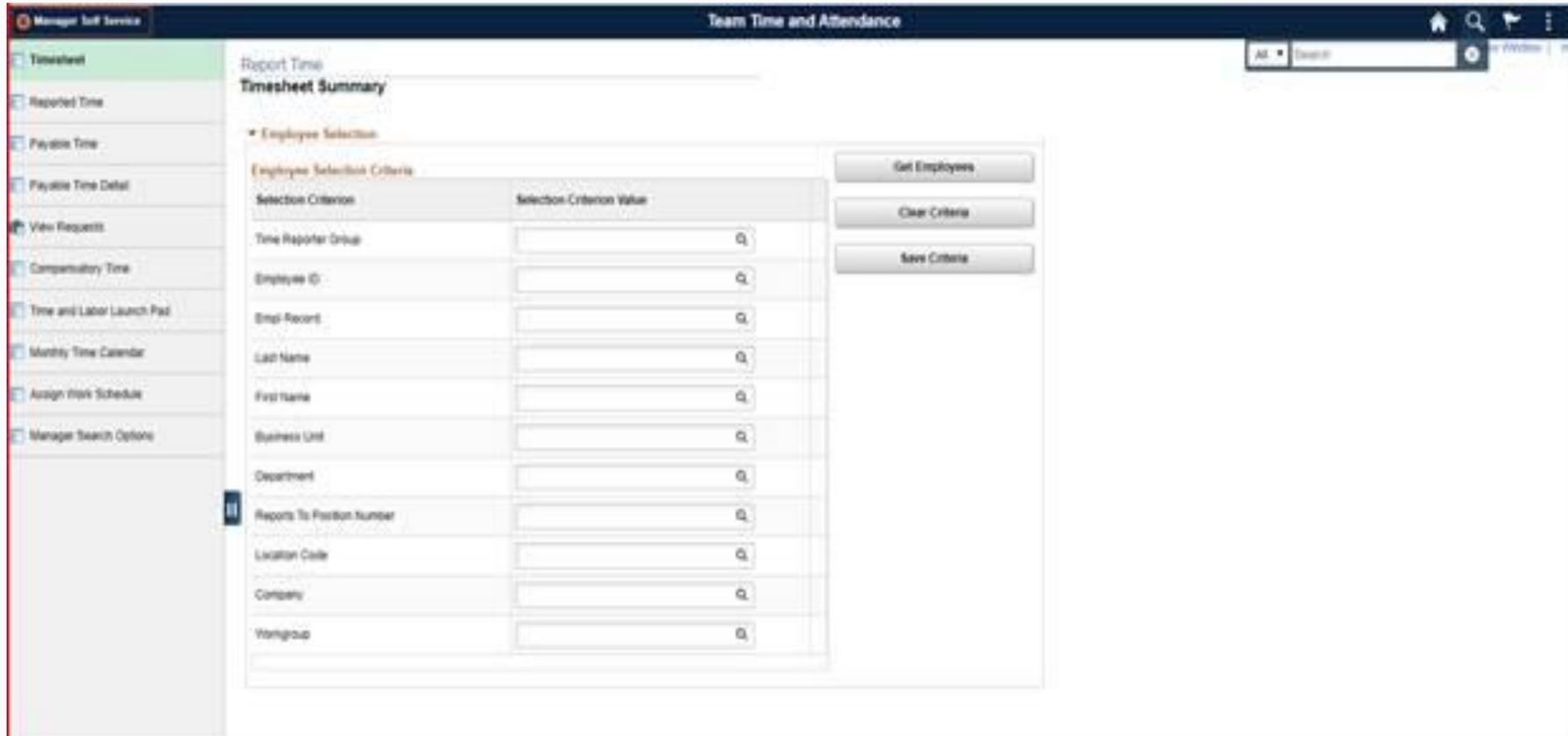# Department Administrator: NavBar Navigation
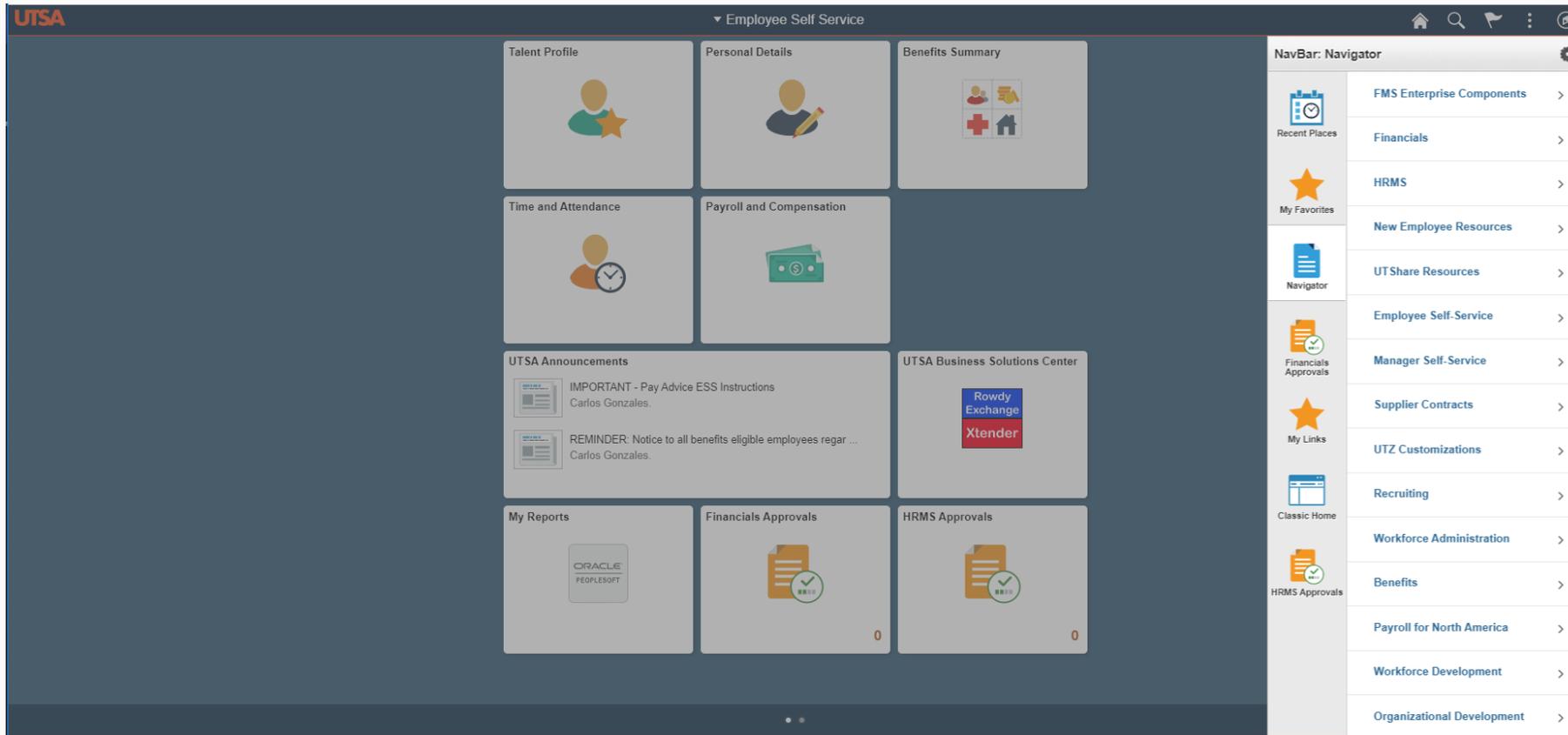
Timekeeper Navigation
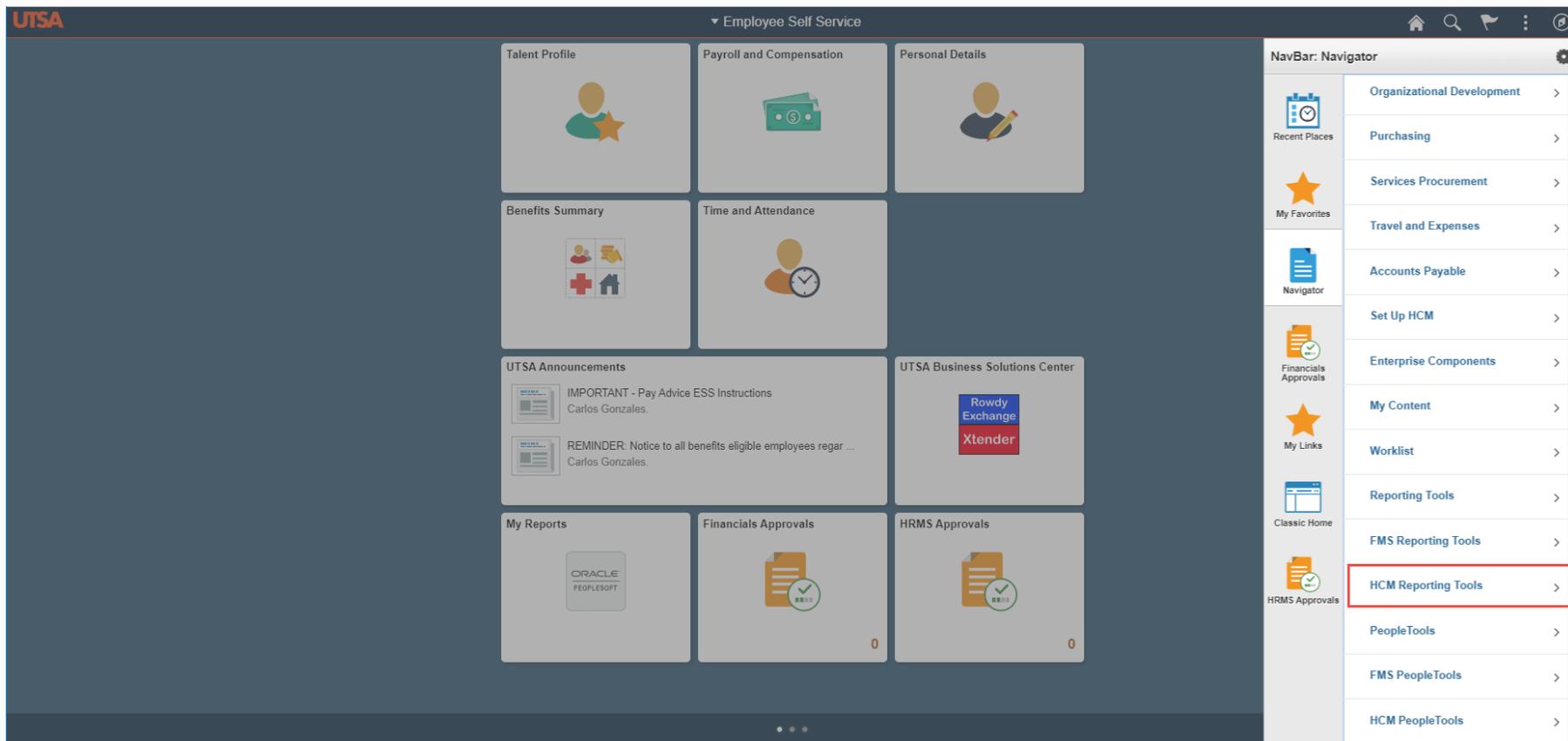
Timekeeper: Workforce Administrator Landing Page
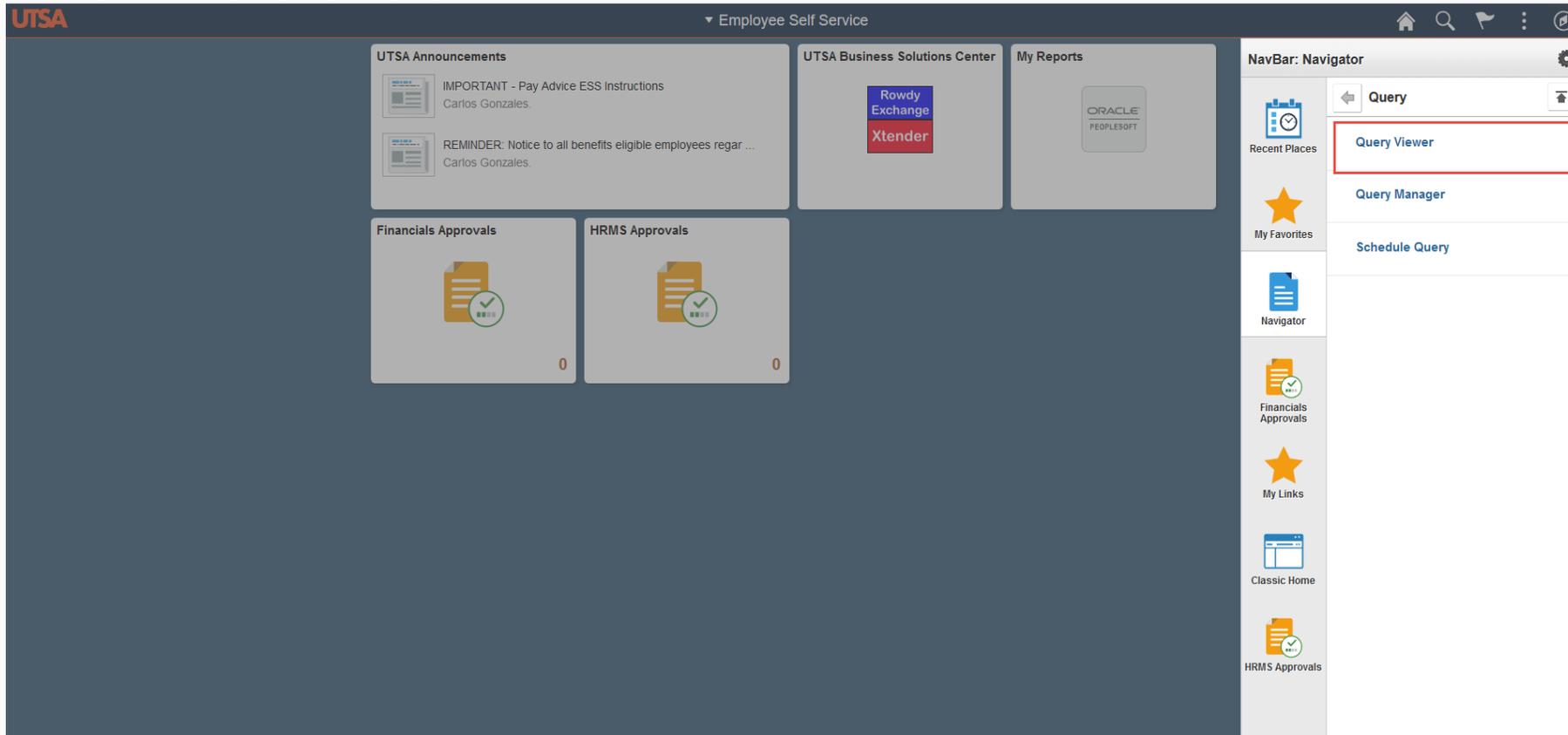
Timekeeper: Navigation Collection

Query Navigation

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