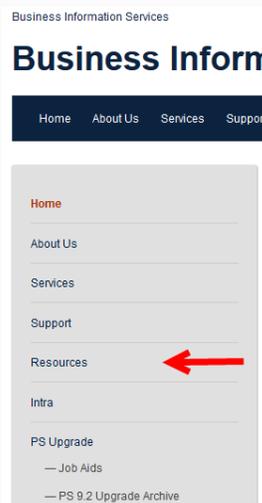


Welcome!

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.

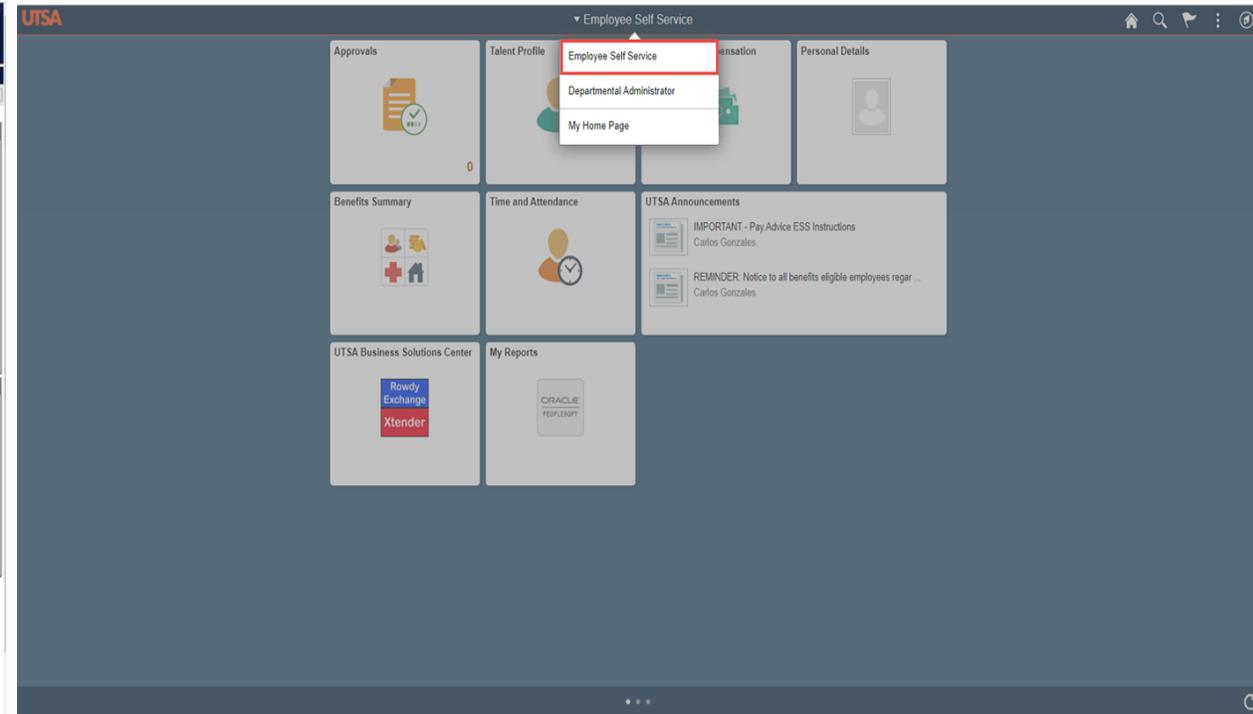
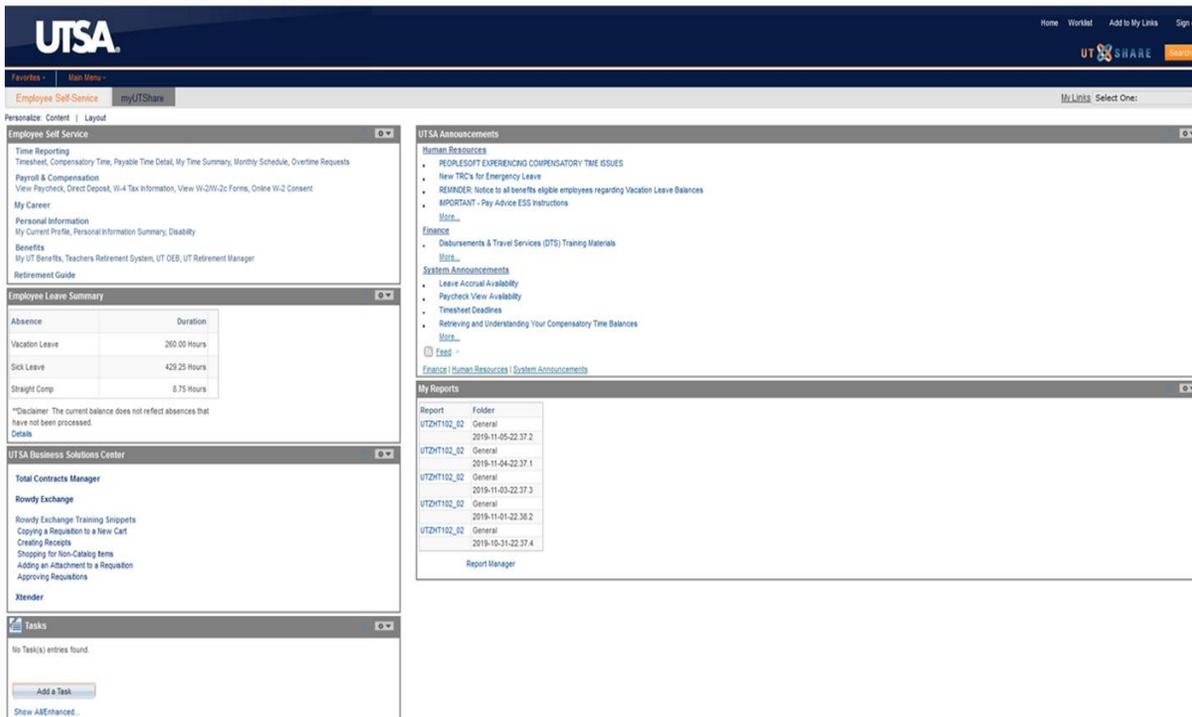
PeopleSoft HCM Fluid User Interface and PeopleSoft Update Manager (PUM) Training

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 Menu 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

Employee Self Service

Time Reporting
Timesheet, Compensatory Time, Payable Time Detail, My Time Summary, Monthly Schedule, Overtime Requests

Payroll & Compensation
View Paycheck, Direct Deposit, W-4 Tax Information, View W-2/W-2c Forms, Online W-2 Consent

My Career
Personal Information
My Current Profile, Personal Information Summary, Disability

Benefits
My UT Benefits, Teachers Retirement System, UT OEB, UT Retirement Manager

Retirement Guide

Employee Leave Summary

Absence	Duration
Vacation Leave	260.00 Hours
Sick Leave	429.25 Hours
Straight Comp	8.75 Hours

Disclaimer The current balance does not reflect absences that have not been processed.
[Details](#)

UTSA Business Solutions Center

Total Contracts Manager

Rowdy Exchange
 Rowdy Exchange Training Snippets
 Copying a Requisition to a New Cart
 Creating Receipts
 Shopping for Non-Catalog Items
 Adding an Attachment to a Requisition
 Approving Requisitions

Xtender

Tasks
 No Task(s) entries found.
[Add a Task](#)
 Show All/Enhanced...

UTSA Announcements

Human Resources

- PEOPLESOFT EXPERIENCING COMPENSATORY TIME ISSUES
- New TRC's for Emergency Leave
- REMINDER: Notice to all benefits eligible employees regarding Vacation Leave Balances
- IMPORTANT - Pay Advice ESS Instructions

[More...](#)

Finance

- Disbursements & Travel Services (DTS) Training Materials

[More...](#)

System Announcements

- Leave Accrual Availability
- Paycheck View Availability
- Timesheet Deadlines
- Retrieving and Understanding Your Compensatory Time Balances

[More...](#)

[Feed](#)

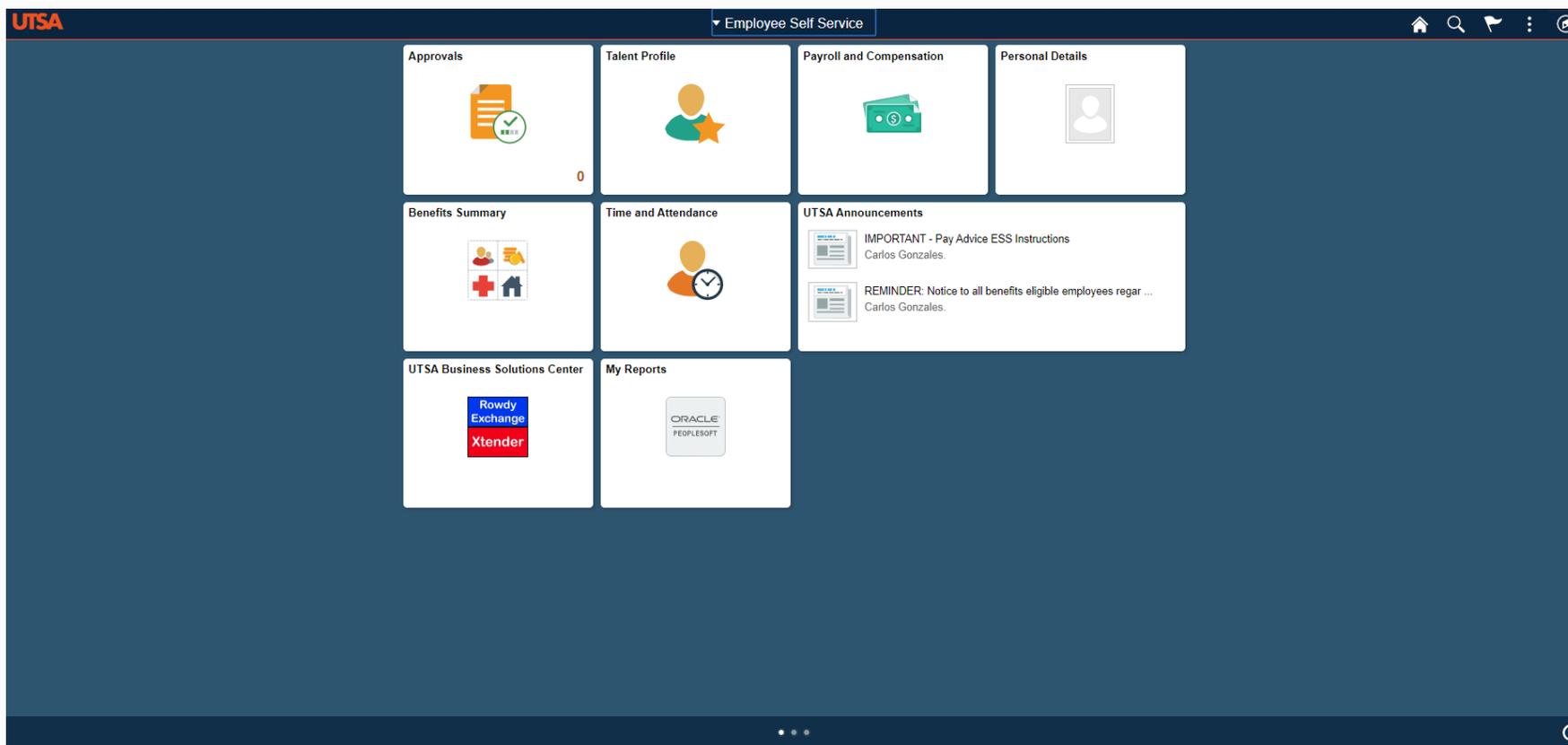
[Finance](#) | [Human Resources](#) | [System Announcements](#)

My Reports

Report	Folder
UTZHT102_02	General
2019-11-05-22.37.2	
UTZHT102_02	General
2019-11-04-22.37.1	
UTZHT102_02	General
2019-11-03-22.37.3	
UTZHT102_02	General
2019-11-01-22.38.2	
UTZHT102_02	General
2019-10-31-22.37.4	

Report Manager

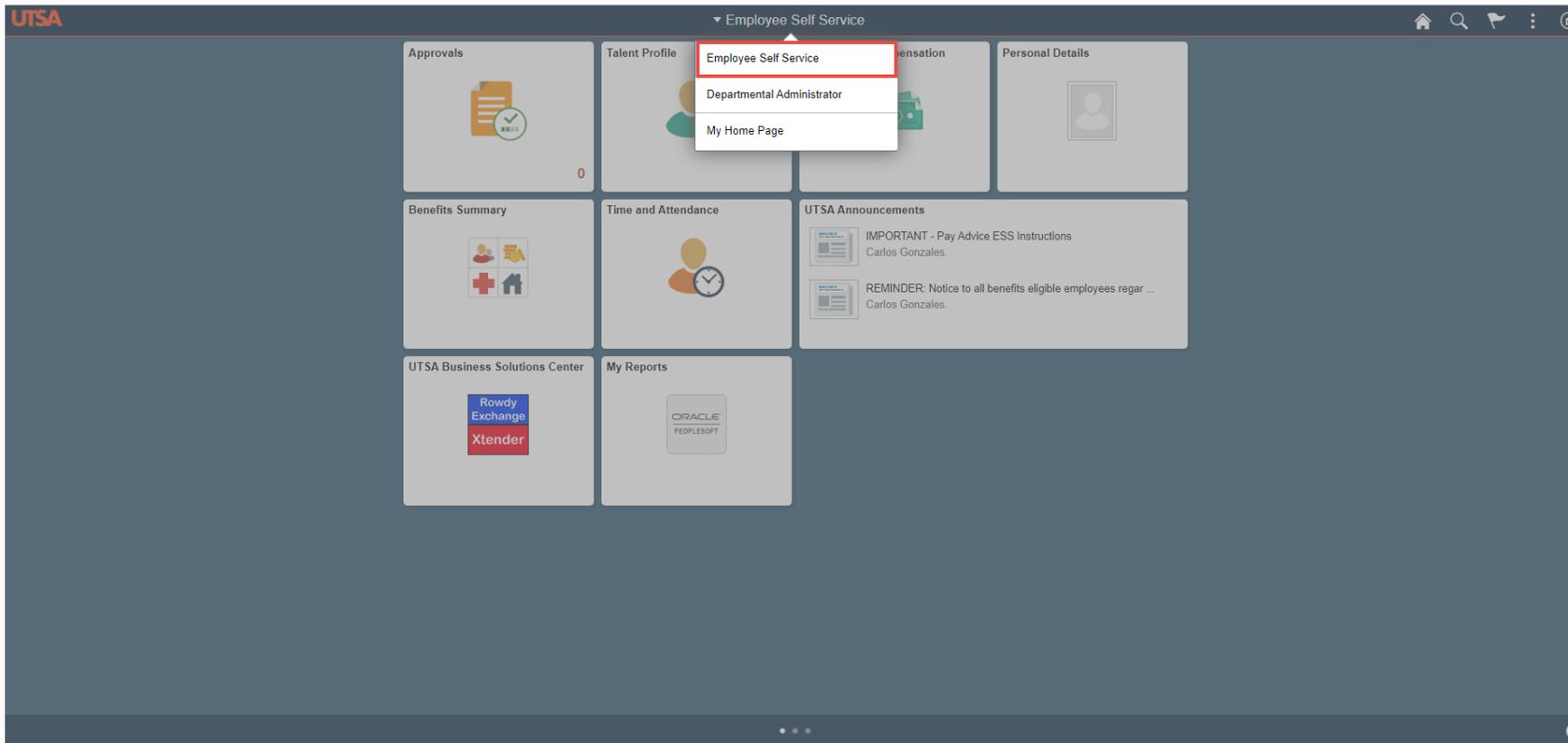
New Fluid Home Page



Landing pages bring together information relevant to a specific role.

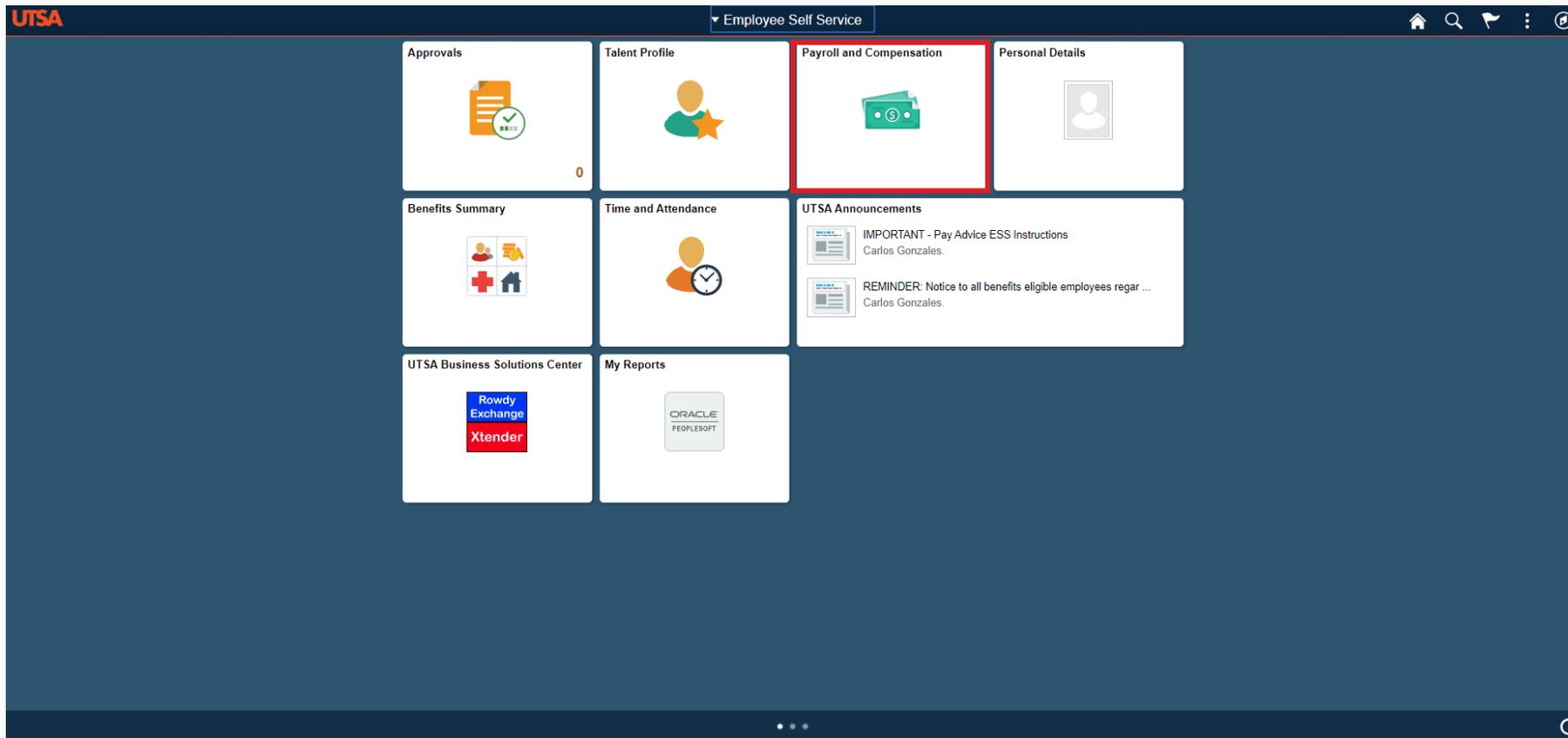
- Access multiple Homepages
- Create Personal Homepages

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

The screenshot displays a web application interface. On the left is a vertical navigation menu with a red border. The menu items are: 'Pay' (highlighted in green), 'Direct Deposit', 'W-4 Tax Information', 'View W-2/W-2c Forms', and 'W-2/W-2c Consent'. Below the menu is a large grey area with a blue pause icon. On the right is a 'Paychecks' section with a dropdown arrow and a table. The table has five columns: 'Check Date', 'Company', 'Pay Begin Date / Pay End Date', 'Net Pay', and 'Paycheck Number'. It contains four rows of data for the University of Texas, San Antonio, with net pay amounts of \$ and paycheck numbers ranging from 3100453513 to 3100472778.

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
09/03/2019	University of Texas, San Anton	08/01/2019 08/31/2019	\$	3100472778
08/01/2019	University of Texas, San Anton	07/01/2019 07/31/2019	\$	3100466239
07/01/2019	University of Texas, San Anton	06/01/2019 06/30/2019	\$	3100459675
06/03/2019	University of Texas, San Anton	05/01/2019 05/31/2019	\$	3100453513

Using Fluid Homepage Controls



Home



Search



Notifications



Actions List

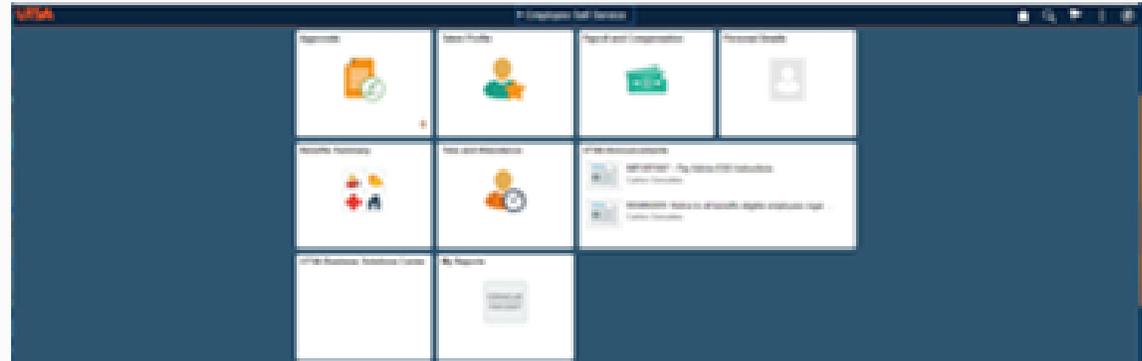


NavBar

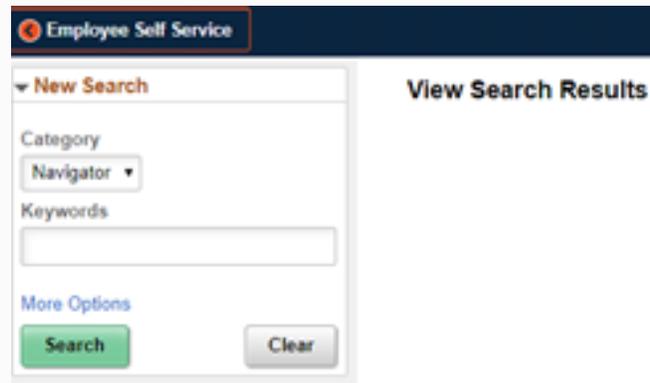
Using Fluid Homepage Controls (continued)



Home



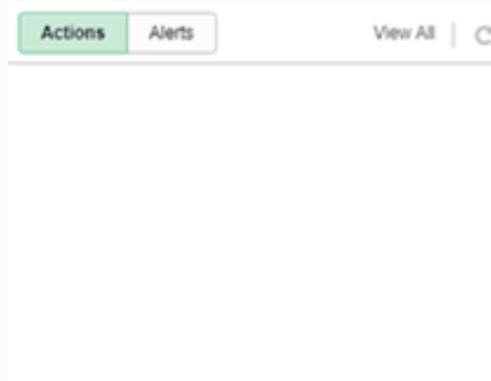
Search



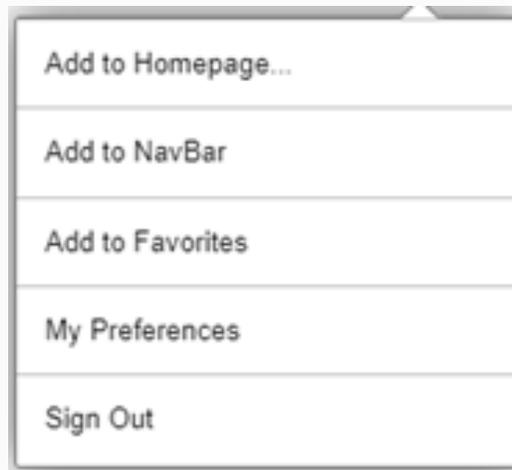
Using Fluid Homepage Controls (continued)



Notifications



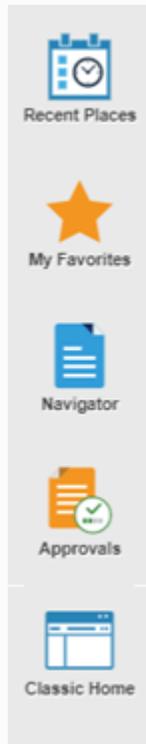
Action List



Using Fluid Homepage Controls (continued)



NavBar



Recent Places

My Favorites

Navigator

Approvals

Classic Home

Actions List: Personalization - Favorites

The screenshot displays the 'Employee Self Service' interface for 'Payroll and Compensation'. On the left, a navigation menu includes 'Pay', 'Direct Deposit', 'W-4 Tax Information', 'View W-2/W-2c Forms', and 'W-2/W-2c Consent'. The main content area is titled 'Paychecks' and contains a table with the following data:

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number	
09/03/2019	University of Texas, San Anton	08/01/2019 08/31/2019	\$2565.49	3100471588	>
08/01/2019	University of Texas, San Anton	07/01/2019 07/31/2019	\$2563.07	3100465148	>
07/01/2019	University of Texas, San Anton	06/01/2019 06/30/2019	\$2548.35	3100458590	>
06/03/2019	University of Texas, San Anton	05/01/2019 05/31/2019	\$2548.36	3100452161	>

A context menu is open on the right side of the table, listing the following actions: 'Add to Homepage...', 'Add to NavBar', 'Add to Favorites' (highlighted with a red border), 'Help', and 'Sign Out'.

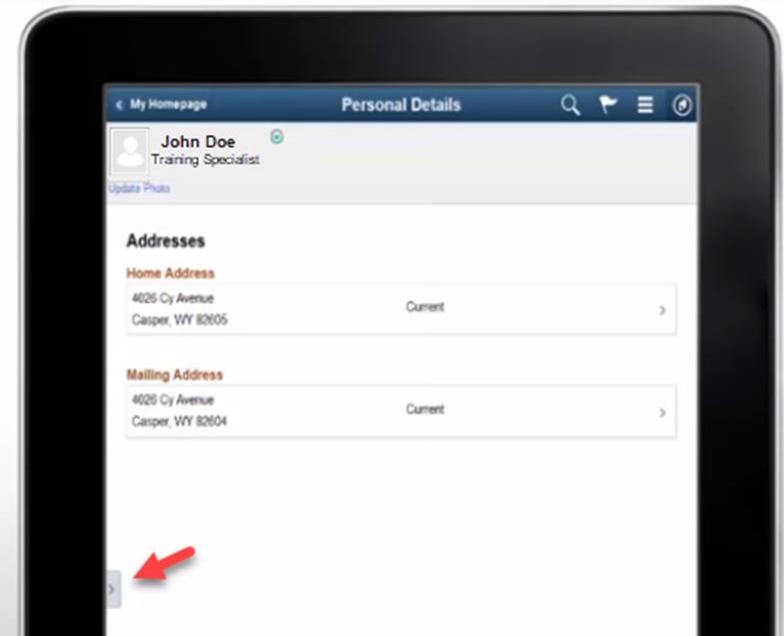
Device Functionality: Desktops

The screenshot displays the 'Employee Self Service' interface for 'John Doe', a Training Specialist. The page is titled 'Personal Details' and features a navigation menu on the left with options: Addresses, Contact Details, Marital Status, Name, Ethnic Groups, Emergency Contacts, Additional Information, Disability, Veteran Status, and Form I-9. The main content area is divided into two sections: 'Addresses' and 'Mailing'. The 'Addresses' section shows a 'Home Address' of '901 Illinois Avenue North, Dallas, TX 75039' with a 'Current' status and a right-pointing arrow. The 'Mailing' section indicates 'No data exists' and includes an 'Add Mailing Address' button.

PeopleSoft Fluid Enables Mobility on Any Device

Device Functionality: Tablets

Tablet (Portrait)

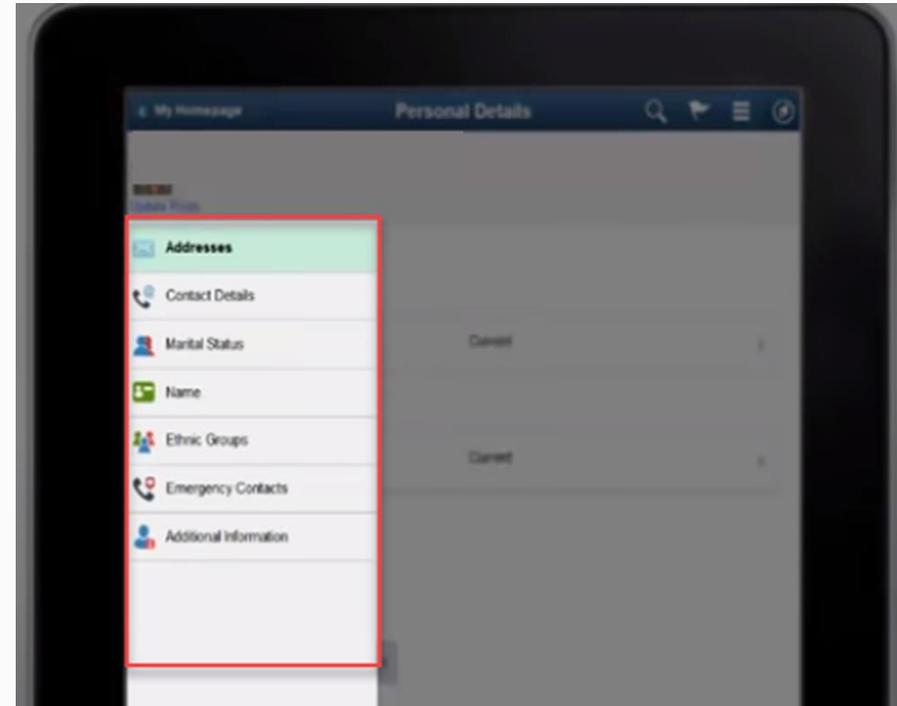


Notice How the Left Panel Slides Away.

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

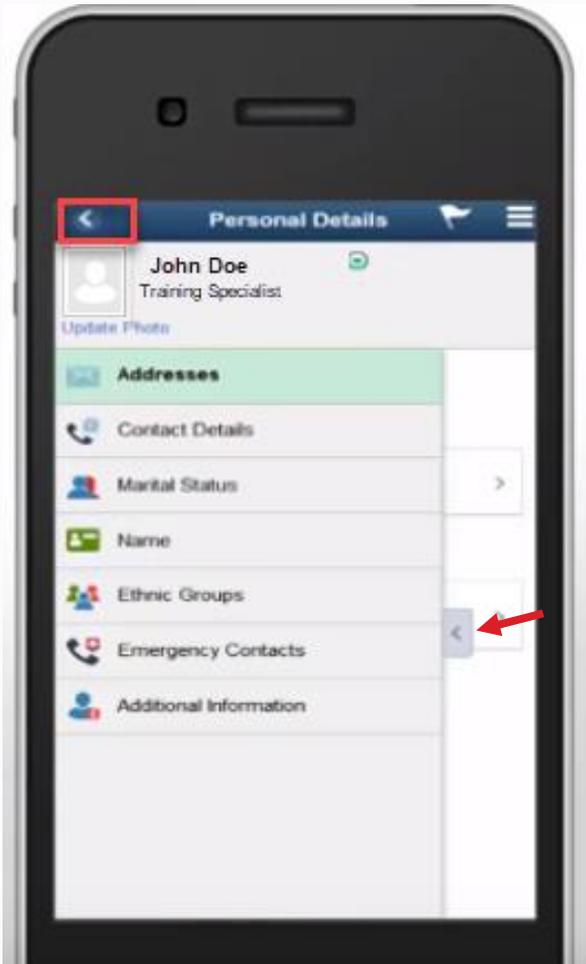
Left Panel Slides Away

Tablet (Portrait)- Left Panel



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

Device Functionality: Smart Phone



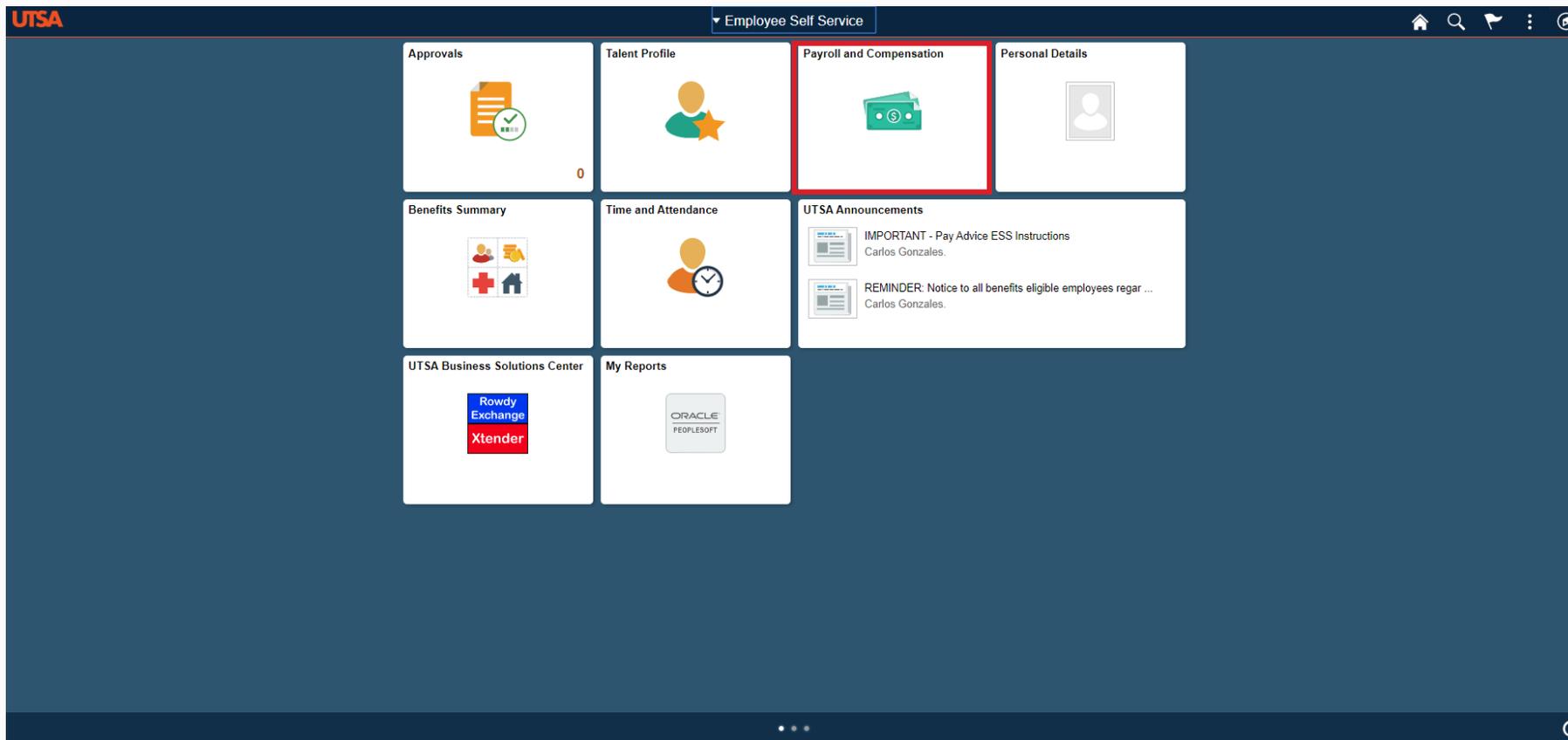
On a Smart phone the Back-button
Changes to an Icon

Changes
TO AN ICON.

Navigation for UTSA End-Users

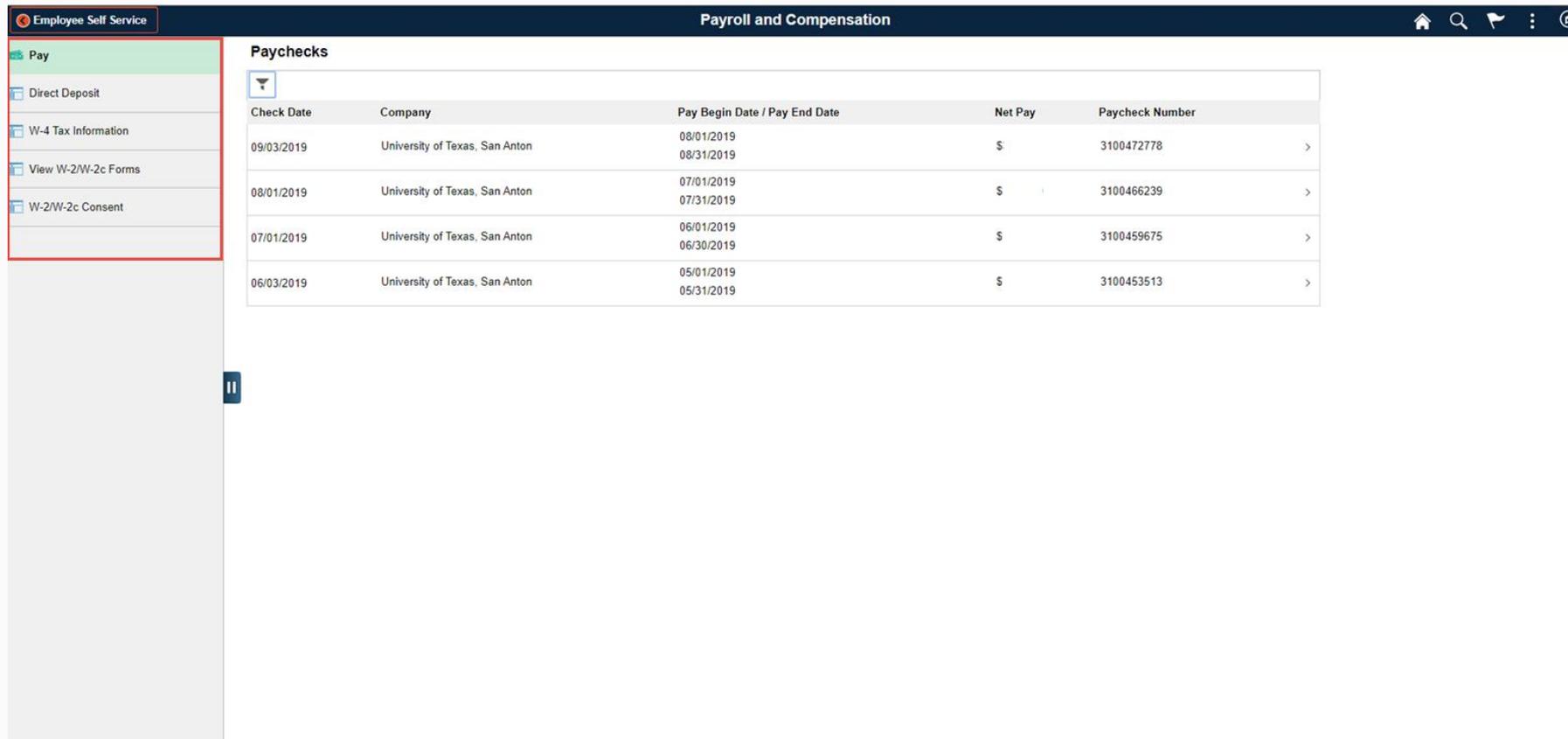
Employee Self Service Navigation

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



Employee Self Service Payroll and Compensation

Pay

- Direct Deposit
- W-4 Tax Information
- View W-2/W-2c Forms
- W-2/W-2c Consent

Paychecks

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
09/03/2019	University of Texas, San Anton	08/01/2019 08/31/2019	\$	3100472778 >
08/01/2019	University of Texas, San Anton	07/01/2019 07/31/2019	\$	3100466239 >
07/01/2019	University of Texas, San Anton	06/01/2019 06/30/2019	\$	3100459675 >
06/03/2019	University of Texas, San Anton	05/01/2019 05/31/2019	\$	3100453513 >

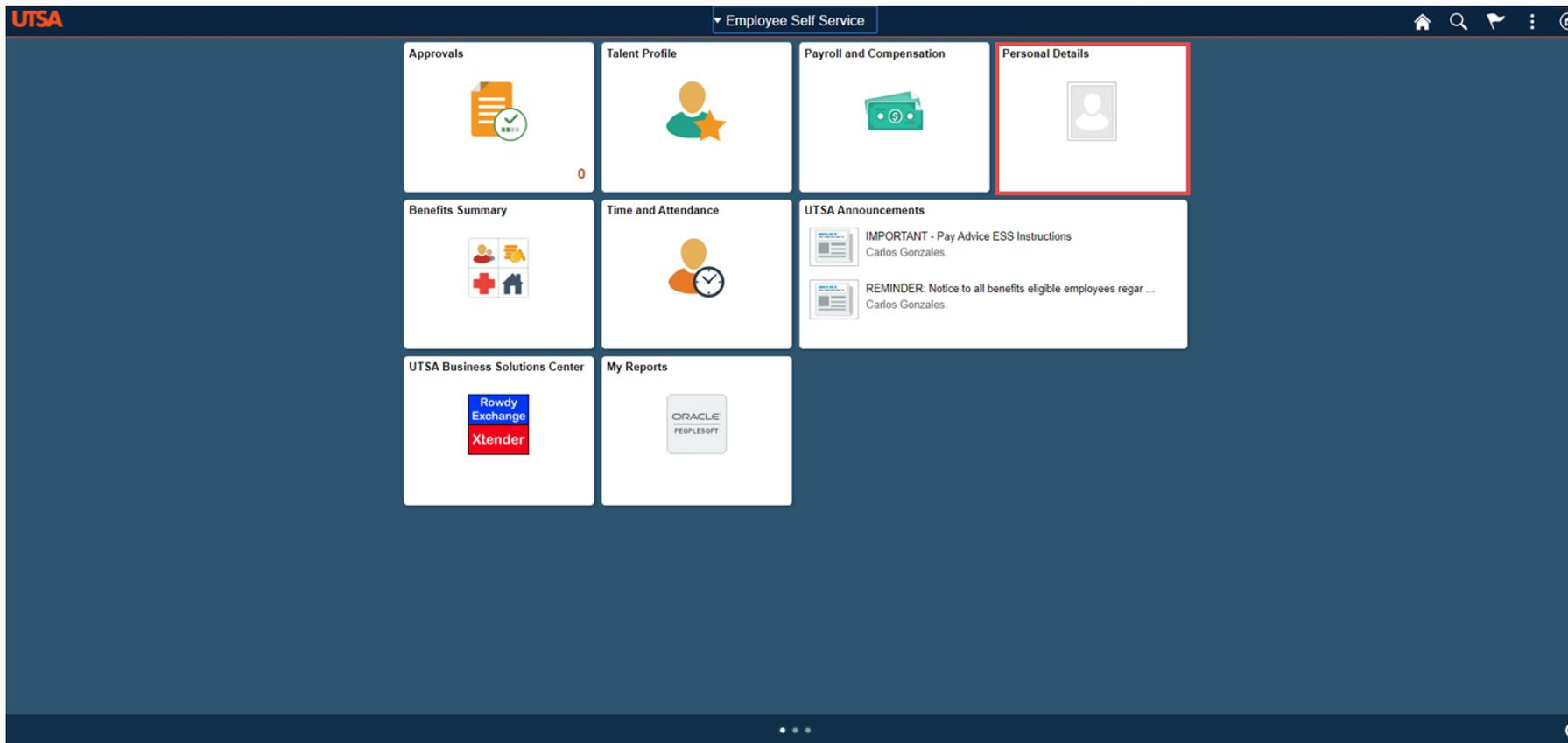
Pay: Page

The screenshot displays the 'Employee Self Service' interface for 'Payroll and Compensation'. On the left, a navigation menu includes 'Pay', 'Direct Deposit', 'W-4 Tax Information', 'View W-2/W-2c Forms', and 'W-2/W-2c Consent'. The main area, titled 'Paychecks', contains a table with the following data:

Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number
09/03/2019	University of Texas, San Anton	08/01/2019 08/31/2019	\$	3100472778
08/01/2019	University of Texas, San Anton	07/01/2019 07/31/2019	\$	3100466239
07/01/2019	University of Texas, San Anton	06/01/2019	\$	3100459675
06/03/2019	University of Texas, San Anton			3100453513

A 'Filter' dialog box is overlaid on the table, allowing users to filter paychecks by date range. The dialog includes 'From' and 'To' date pickers, with 'From' set to 06/03/2019 and 'To' set to 09/03/2019. The dialog also features 'Cancel' and 'Done' buttons.

Employee Self-Service: Landing Page



Personal Details: Navigation Collection

The screenshot displays the 'Employee Self Service' interface for 'John Doe, Training Specialist'. The page title is 'Personal Details'. On the left, a navigation menu is highlighted with a red box, listing: Addresses, Contact Details, Marital Status, Name, Ethnic Groups, Emergency Contacts, Additional Information, Disability, Veteran Status, and Form I-9. The main content area shows the 'Addresses' section with a 'Home Address' entry: '901 Illinois Avenue North, Dallas, TX 75039', marked as 'Current'. Below this is the 'Mailing' section, which states 'No data exists' and includes an 'Add Mailing Address' button.

Change Address

The screenshot displays the 'Employee Self Service' interface for 'Patricia Sauer, PSSC HCM BUSINESS ANALYST I'. The 'Personal Details' page is open, showing a sidebar with navigation options like 'Addresses', 'Contact Details', 'Marital Status', 'Name', 'Ethnic Groups', 'Emergency Contacts', 'Additional Information', and 'Disability'. The main content area shows 'Addresses' with a 'Home Address' listed as '2250 FM 1518, SAN ANTONIO, TX 78238'. A modal window titled 'Address' is open, allowing for address changes. The modal includes a 'Cancel' button and a 'Save' button. It features an 'Employee Instruction' section stating: 'To save United States addresses at least one of the following fields must get populated: Address 1, Address 2, Address 3'. Below this, there are input fields for 'Change As Of' (11/06/2019), 'Address Type' (Home), 'Country' (United States), 'Address 1' (2250 FM 1518), 'Address 2', 'Address 3', 'City' (SAN ANTONIO), 'State' (Texas), 'Postal' (78132-4827), and 'County' (Comal).

Employee Self Service Personal Details

Patricia Sauer
PSSC HCM BUSINESS ANALYST I

Addresses

Home Address
2250 FM 1518
SAN ANTONIO, TX 78238

Mailing
No data exists.
Add Mailing Address

Cancel Address Save

Employee Instruction
To save United States addresses at least one of the following fields must get populated: Address 1, Address 2, Address 3

Change As Of 11/06/2019

Address Type Home

Country United States

Address 1 2250 FM 1518

Address 2

Address 3

City SAN ANTONIO

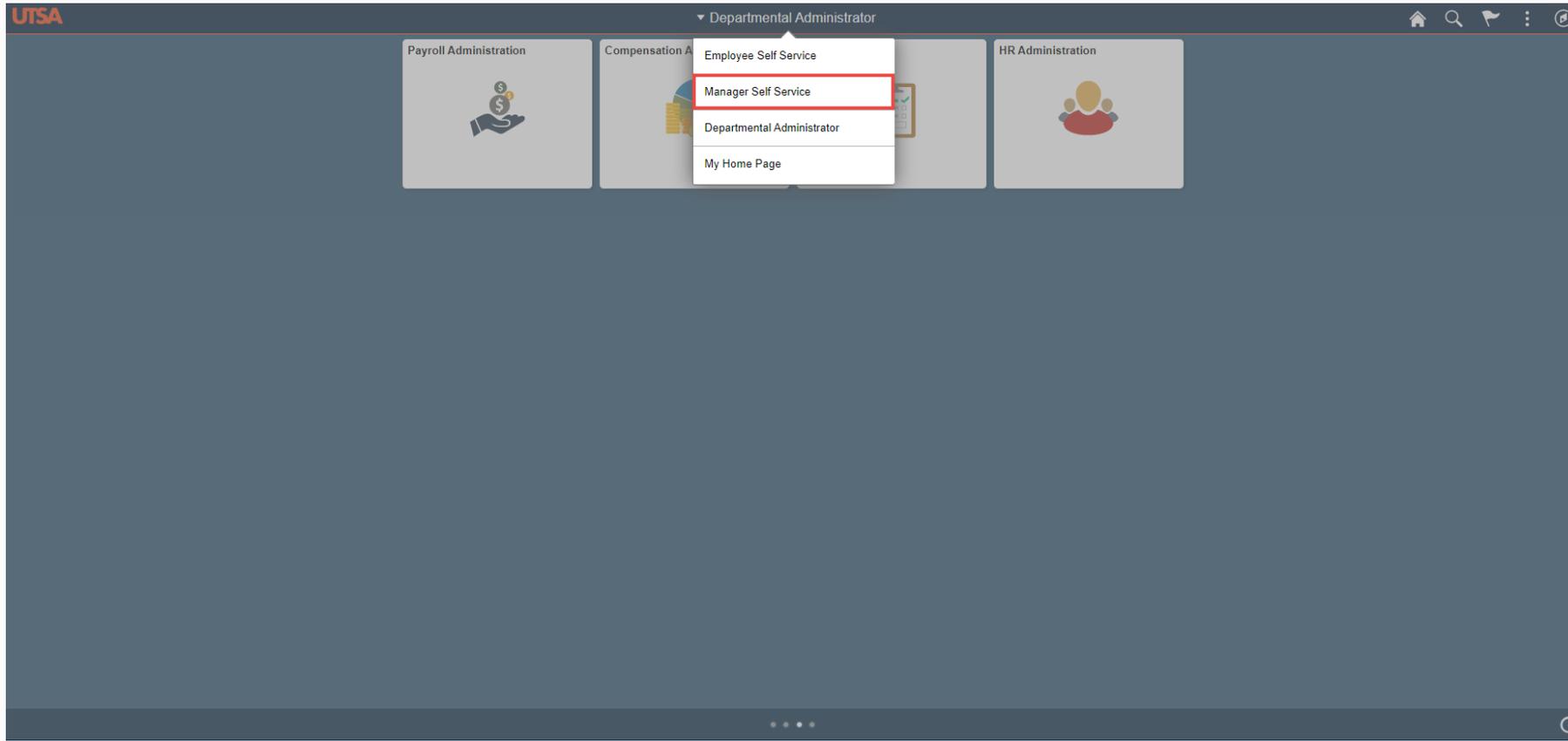
State Texas

Postal 78132-4827

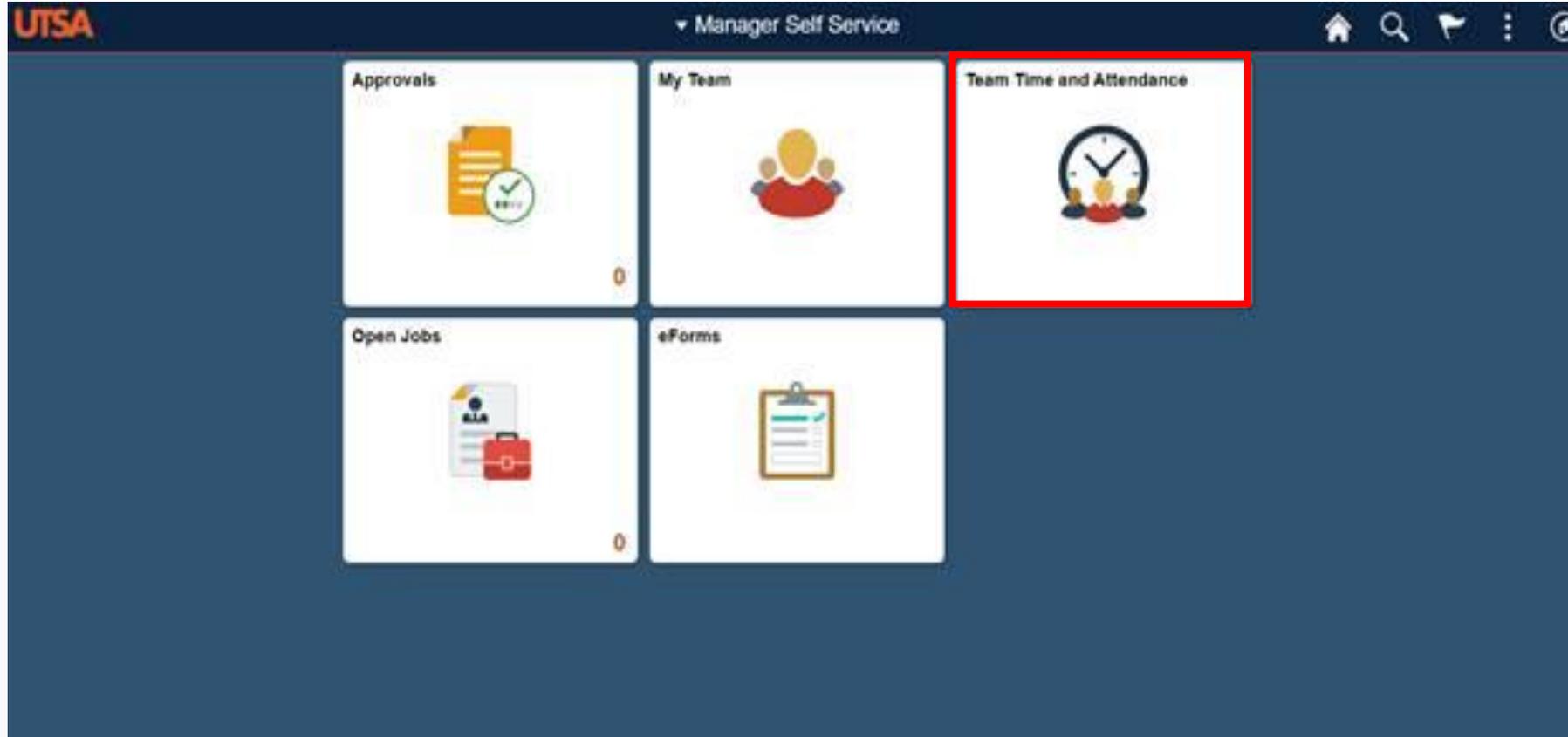
County Comal

Manager Self Service Navigation

Manager Self-Service Landing Page



Manager Self-Service: Landing Page



Manager Self Service: Navigation Collection

Manager Self Service
eForms Portal Pagelet

- [View Existing Requests](#)
- [Create New Request](#)
- [My Pending Approvals](#)
- [Budget Overview](#)
- [Reports](#)

My Requests Personalize | Find | View All | [Print] | [Refresh] First ◀ Prev 1 of 1 Next ▶ Last

Request ID	eForms Action	Status	Name
1	URL		

My Pending Approvals Personalize | Find | View All | [Print] | [Refresh] First ◀ Prev 1 of 1 Next ▶ Last

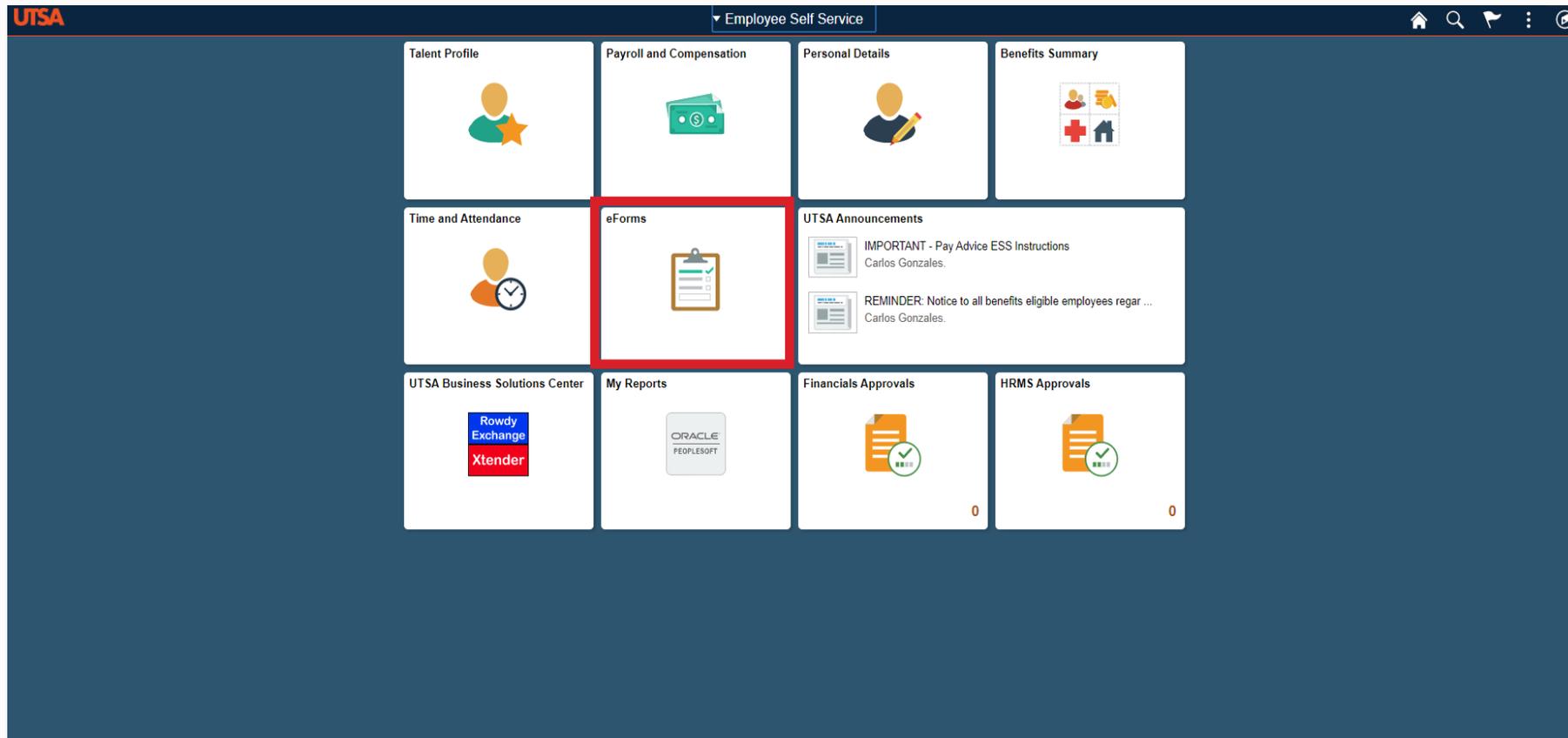
Request ID	eForms Action	Status	Name
1 00095979	Funding Change	Pending Approvals	

Admin Find | View 100 | [Print] | [Refresh] [H] 1-5 of 35828 [D]

Request ID	eForms Action	Status	Name
1 00001272	End Appointment	Completed	Williams,Raiven S.
2 00001291	Termination	Cancelled	Salinas,Reynaldo
3 00001292	End Appointment	Cancelled	Salinas,Reynaldo
4 00001293	End Appointment	Cancelled	Salinas,Reynaldo
5 00001359	Appointment	Completed	Morales,Jafet Aaron

eForms Navigation

eForms Requestor: Employee Self Service Landing Page



eForms Requester: Navigation Collection

The screenshot shows the 'Employee Self Service' navigation menu on the left, with 'View Existing Requests' highlighted. The main content area is titled 'eForms Portal Pagelet' and contains a 'My Requests' section. This section includes a table with one row containing the text '1 URL'. Navigation controls for the table are visible above the table, including 'Personalize', 'Find', 'View All', and pagination options 'First', 'Prev 1 of 1', 'Next', and 'Last'.

Employee Self Service **eForms Portal Pagelet**

[View Existing Requests](#)
[Create New Request](#)
[Budget Overview](#)
[Reports](#)

My Requests [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Calendar](#) | [First](#) | [Prev 1 of 1](#) | [Next](#) | [Last](#)

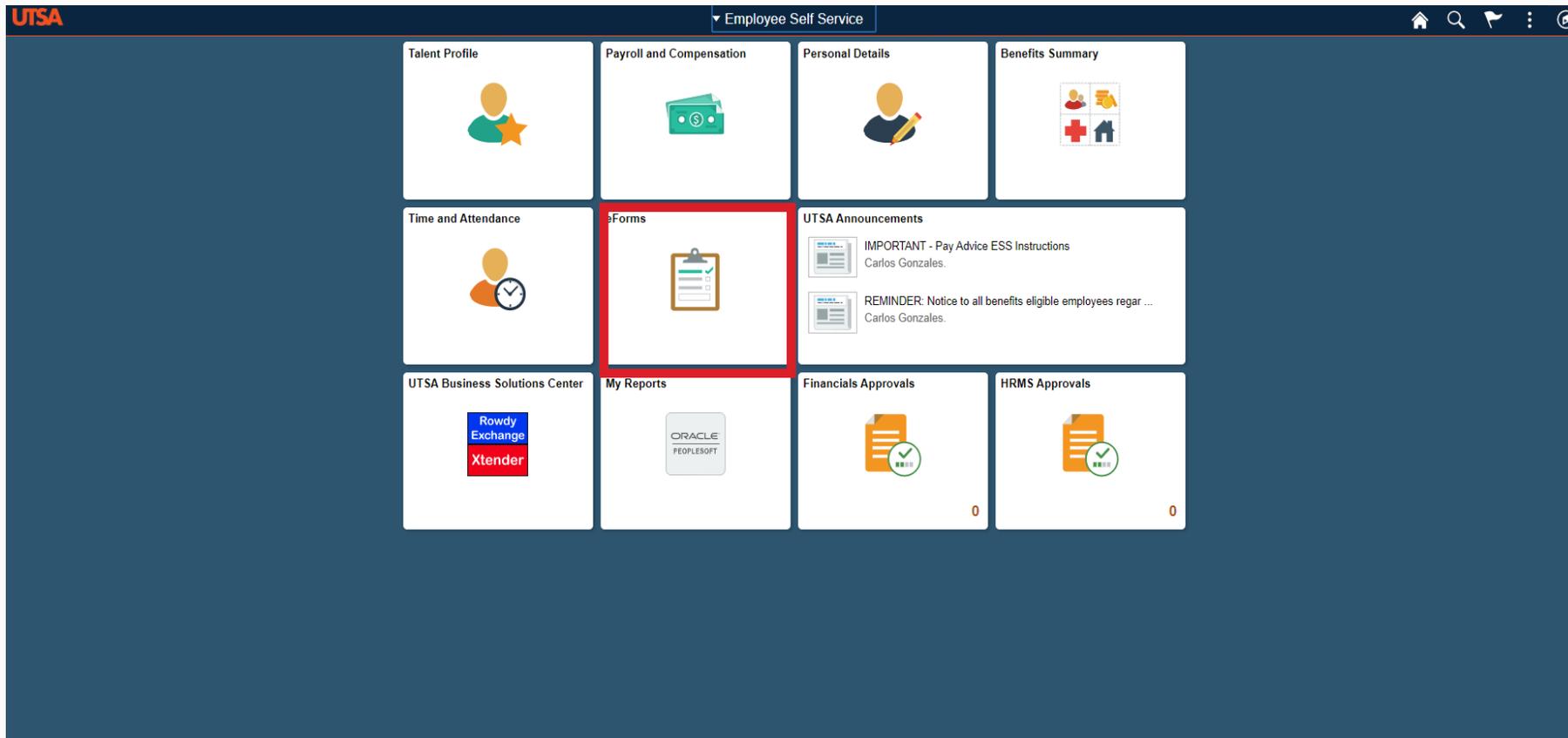
Request ID	eForms Action	Status	Name
1	URL		

eForms Requester: Navigation Collection

The screenshot displays the 'Initiate New eForms Request' page. At the top, there is a dark blue navigation bar with 'eForms Home' on the left, 'Initiate New eForms Request' in the center, and navigation icons (home, search, flag, menu, refresh) on the right. Below the navigation bar, the page title 'Initiate New eForms Request' is repeated. The main content area is divided into several sections:

- Action:** A section with a dropdown menu for 'Actions', a 'Status' field, and a large text area for 'Justification'. To the right of this section are links for 'Request ID', 'Request Date', 'Processing Messages', and 'Request History'.
- Contact Information:** A section with a dropdown arrow and the title 'Contact Information'. It contains two sub-sections:
 - Entered By:** A list of fields with values: Name (Olga Hernandez), Phone (210/458-5876), Email ID (Olga.Hernandez@utsa.edu), and Dept ID (BPC001 BUSINESS INFORMATION SERVICES).
 - Secondary Contact:** Two input fields for 'Name' and 'Phone'.
- Buttons:** A 'Notify' button with a mail icon and an 'Add' button with a plus icon are located at the bottom of the form area.

eForms Approver: Employee Self Service Landing Page



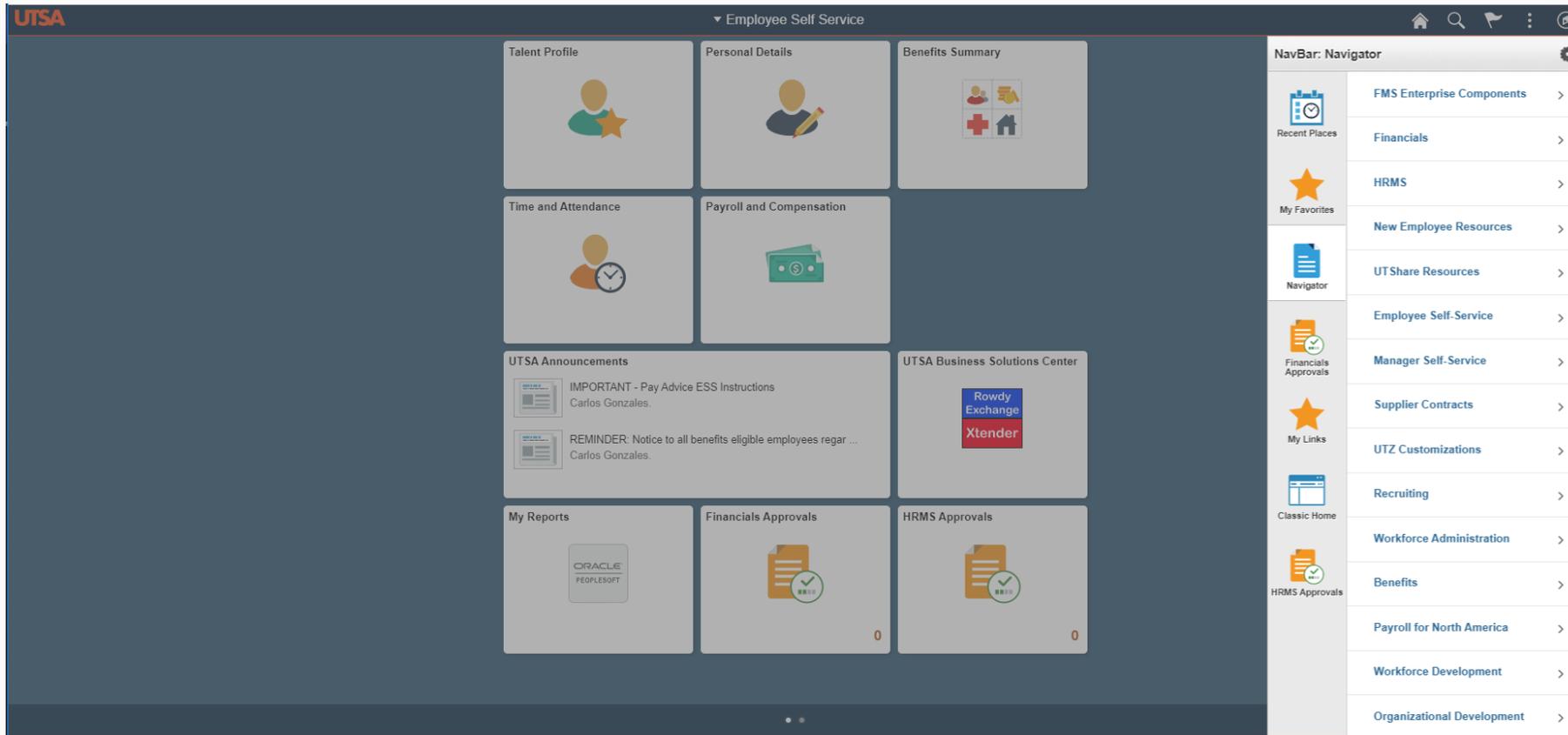
eForms Approver: Navigation Collection

The screenshot shows the 'Employee Self Service' navigation bar with 'eForms Portal Pagelet' on the right. A sidebar on the left contains 'My Pending Approvals' and 'Budget Overview'. The main content area features a 'My Pending Approvals' section with a table of request details.

Request ID	eForms Action	Status	Name
1	URL		

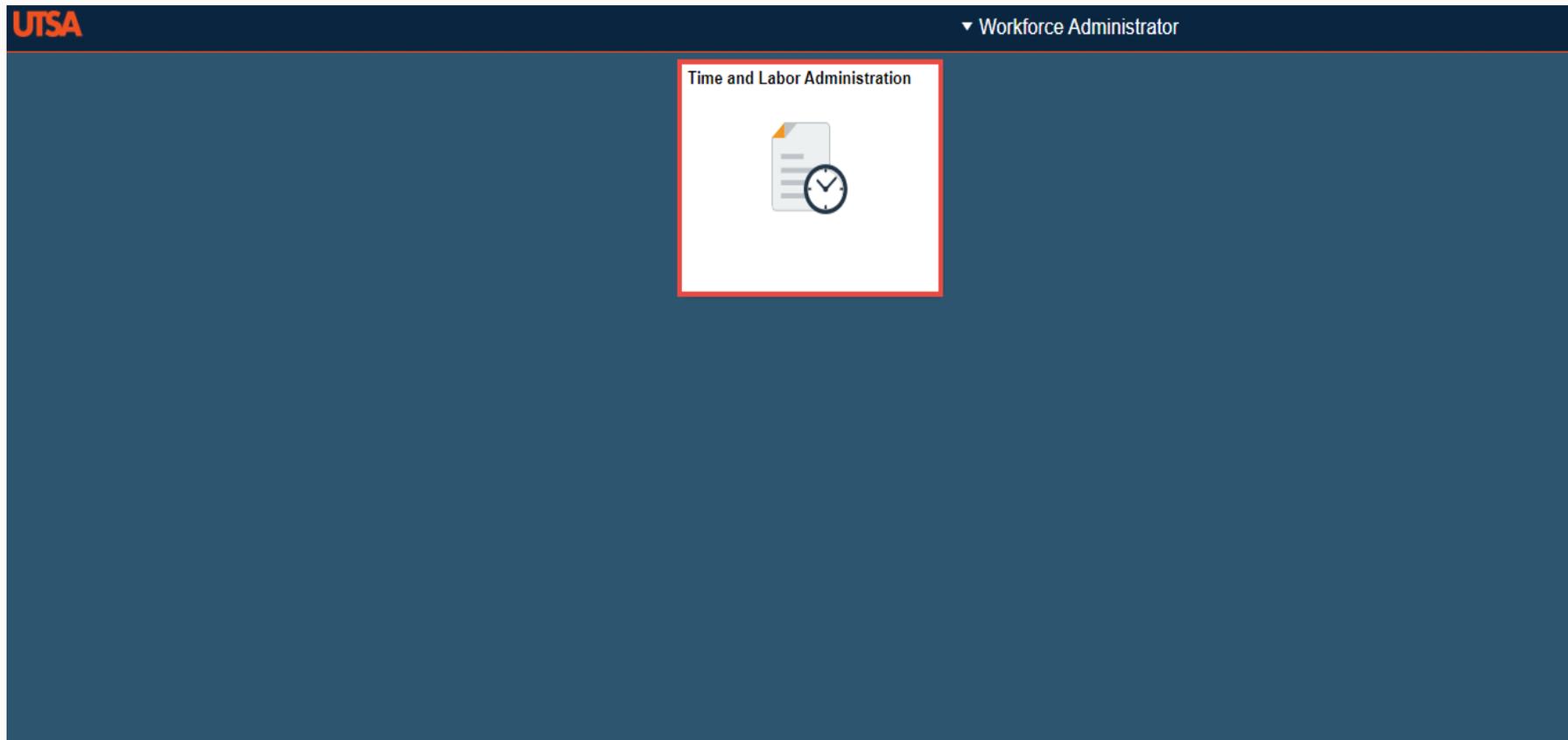
Department Admin Navigation

Department Administrator: NavBar Navigation

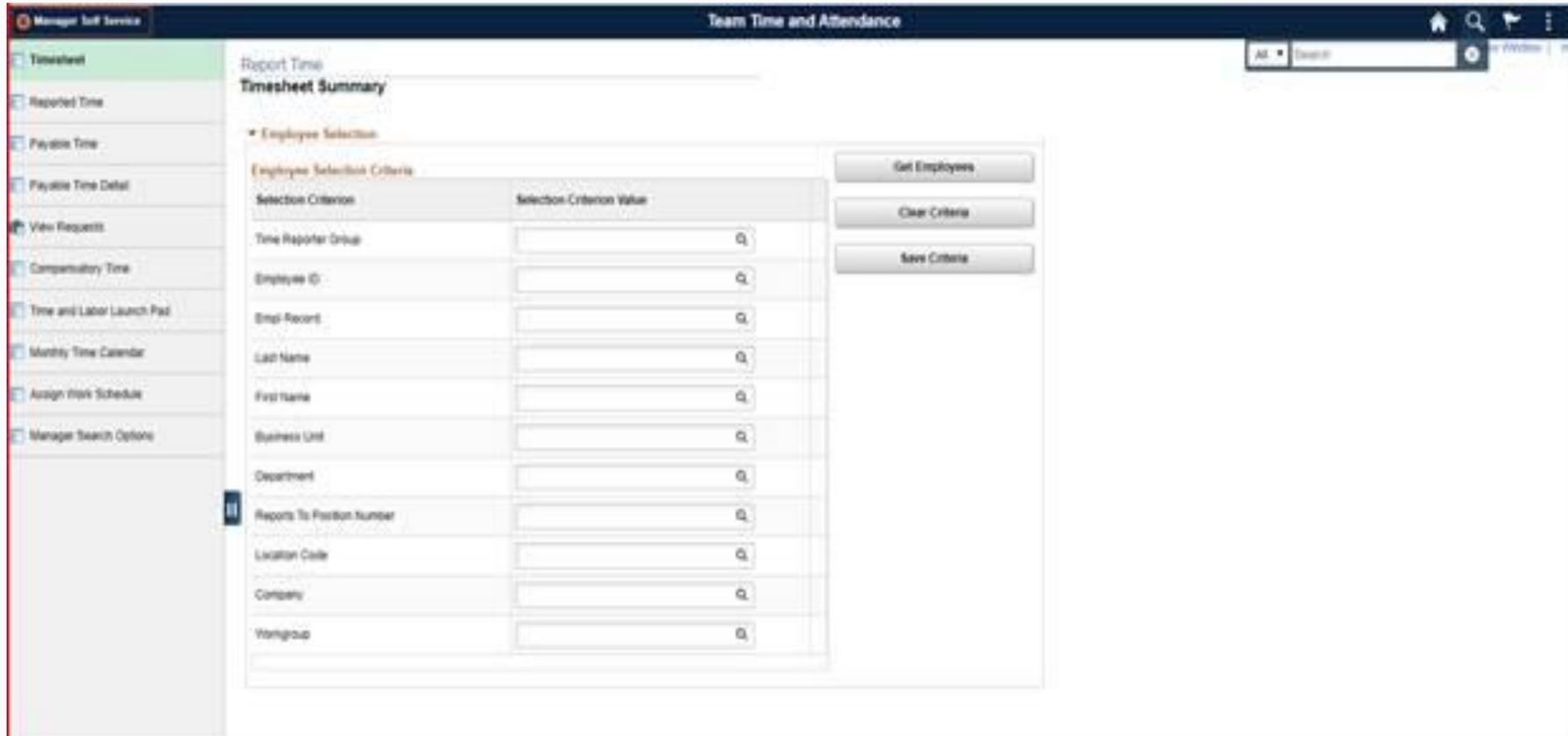


Timekeeper Navigation

Timekeeper: Workforce Administrator Landing Page

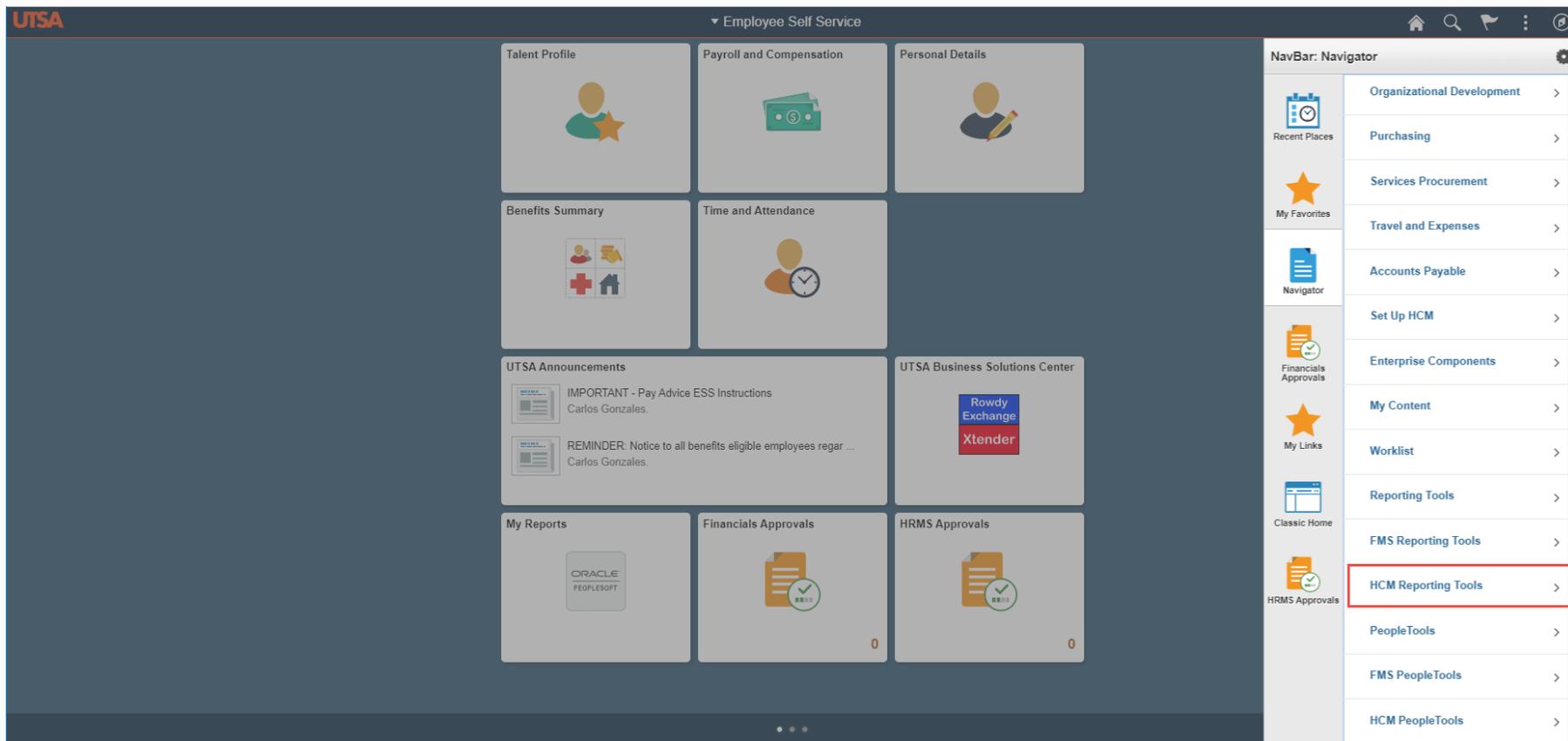


Timekeeper: Navigation Collection

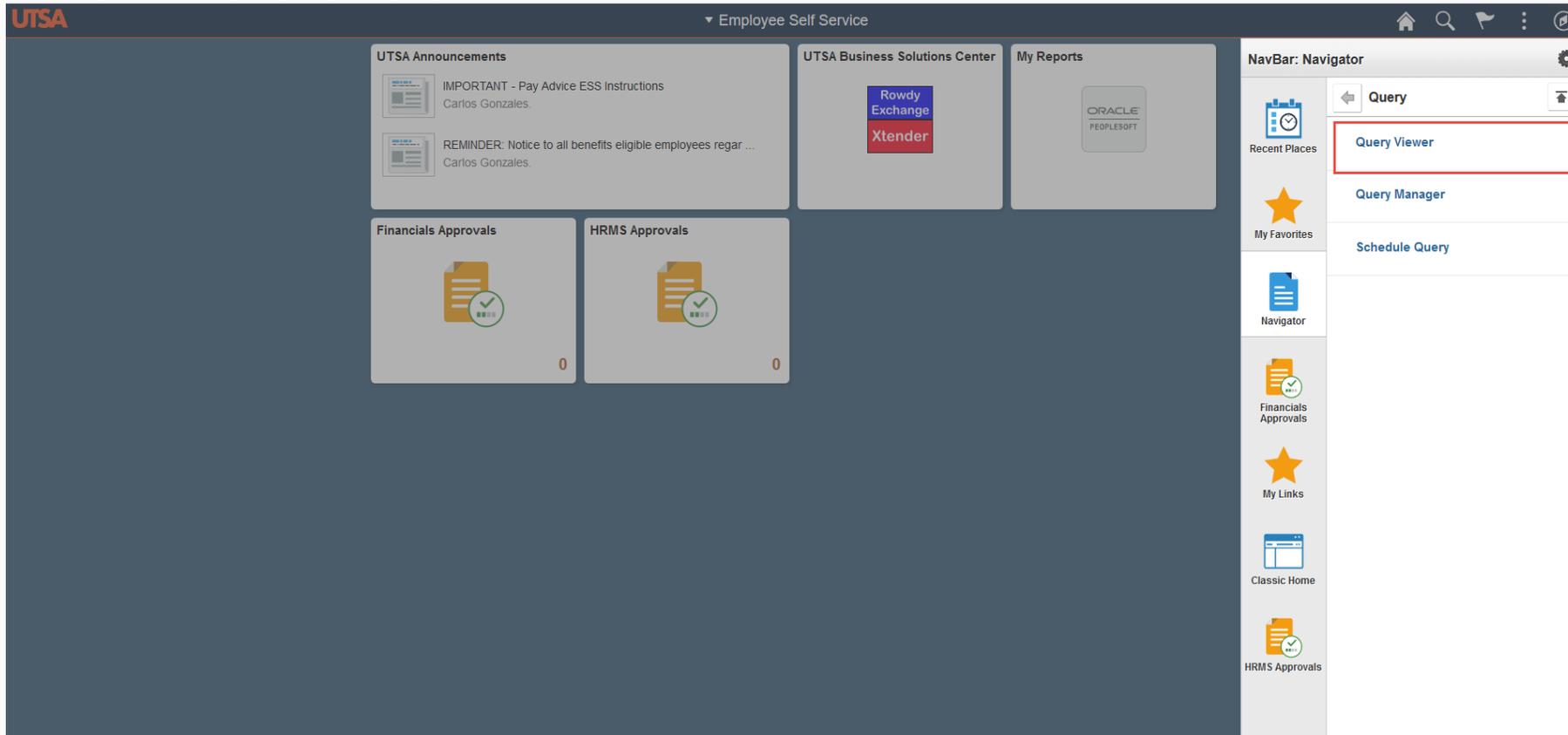


Query Navigation

Navigation to HCM Reporting



Navigation to HCM Reporting



Navigation to HCM Reporting

Employee Self Service
Query Viewer

[Home](#) [Search](#) [Flag](#) [More](#) [Refresh](#)

[New Window](#) | [Help](#) | [Personalize Page](#)

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

My Favorite Queries Personalize | Find | |

First Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
UTS_CA_FILLED_AND_VACANT_POS	FILLED AND VACANT POS REPR2	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTS_HP_PAY_CHECK_EMPL_DATA	Pay Check Earnings	Public	DAVID L	HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTS_HR_TL_TIMEKEEPERS	UTS_HR_TL_TIMEKEEPERS	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTS_HW_JOB_UPDATEBY	provides update by and date	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTS_PAYLINE_DATA_DUMP2	data dump pay line	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTS_TL_REPORTED_PAYABLE_TIME	REPORTED_AND_PAYABLE_TIME	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTS_TL_TRC_LOOKUP		Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTZ_HA_VAC_SICK_LEAVE_BALANCE		Public	ABM	HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTZ_TL_COMP_BAL_DTLS_BY_EE	UTZ_TL_COMP_BAL_DTLS_BY_EE	Public		HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTZ_TL_ENROLL_EMPLDATA		Public	AUTO ENROLLMENT	HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTZ_TL_ENROLL_INACTIVE_JOB	UTZ_TL_ENROLL_INACTIVE_JOB	Public	AUTO ENROLLMENT	HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>
UTZ_TL_JOB_NO_TLENROLL	UTZ_TL_JOB_NO_TLENROLL	Public	AUTO ENROLLMENT	HTML	Excel	XML	Schedule	Lookup References	<input type="button" value="[-]"/>

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>

