



**UTSA**<sup>®</sup>

The University of Texas at San Antonio<sup>™</sup>

**PeopleSoft FMS FLUID Training**

**Business Information Services**

**November / December 2019**

# Presenters

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# Agenda

- 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)

Classic	Fluid
Home Page Tabs	Landing Pages
Navigational Links	Tiles
Menu Breadcrumbs Navigation	Nav Bar
Classic Header	Fluid Header
Pixel Perfect Page Design	Responsive Page Design
N/A	Notifications Framework
N/A	Fluid Personalization
Pagelets	To be converted into Tiles
Global Search is on Menu Bar	Global Search is on Fluid Header

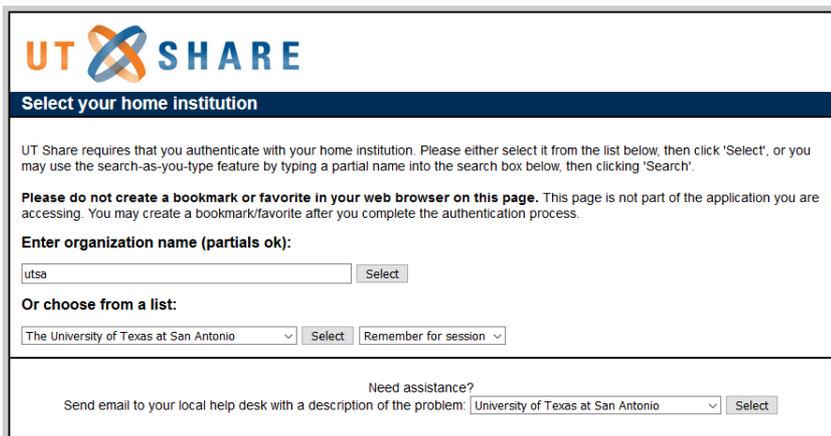
# Benefits of Fluid

- 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



The screenshot shows the UT SHARE login interface. At the top is the logo with the text "UT SHARE". Below it is a dark blue header with the text "Select your home institution". The main content area contains instructions: "UT Share requires that you authenticate with your home institution. Please either select it from the list below, then click 'Select', or you may use the search-as-you-type feature by typing a partial name into the search box below, then clicking 'Search'." A warning follows: "Please do not create a bookmark or favorite in your web browser on this page. This page is not part of the application you are accessing. You may create a bookmark/favorite after you complete the authentication process." There are two input sections: "Enter organization name (partials ok):" with a text box containing "utsa" and a "Select" button; and "Or choose from a list:" with a dropdown menu showing "The University of Texas at San Antonio", a "Select" button, and a "Remember for session" checkbox. At the bottom, there is a "Need assistance?" section with a dropdown menu showing "University of Texas at San Antonio" and a "Select" button.



The University of Texas at San Antonio™

myUTSA ID

Password

- › [Forgot your password?](#)
- › [Need Help?](#)
- › [Acceptable Use Policy](#)

For security reasons, please exit your Web browser and/or log out completely when you are done accessing services that require authentication, especially if you are using a public computer or kiosk.

This is a logon server for multiple web services, please do not bookmark this page.

This computer application is the property of The University of Texas at San Antonio. Improper or unauthorized use of this application may lead to criminal prosecution or other disciplinary action. Use of this application, authorized or unauthorized, constitutes consent to monitoring of the system and the user's acknowledgement of accountability and responsibility.

# Classic PeopleSoft

The screenshot displays the classic PeopleSoft interface for UTSA Business Affairs. The top navigation bar includes the UTSA logo, user links (Home, Worklist, Add to My Links, Sign out), and a search bar labeled 'UT SHARE'. Below this is a secondary navigation bar with 'Employee Self-Service' and 'myUTShare' tabs, and a 'My Links' dropdown menu.

The main content area is divided into several sections:

- Employee Self Service:** Contains links for Time Reporting, Payroll & Compensation, My Career, Personal Information, Benefits, and Retirement Guide.
- Employee Leave Summary:** A table showing absence types and durations.
 

Absence	Duration
Vacation Leave	165.00 Hours
Sick Leave	168.50 Hours
Straight Comp	0.00 Hours
- UTSA Business Solutions Center:** Includes Total Contracts Manager, Rowdy Exchange, and Xtender.
- Tasks:** A section for managing tasks, currently showing 'Approval Workflow'.
- UTSA Announcements:** A feed of news items under categories like Human Resources, Finance, and System Announcements.
- My Reports:** A table listing reports such as 'UTZ\_QAL\_CF' with their folders and dates.
- eForms:** A section for managing requests and approvals, including 'My Requests' and 'My Pending Approvals'.

# Fluid PeopleSoft Home / Landing Page

The screenshot displays the Fluid PeopleSoft Employee Self Service Home / Landing Page. The interface features a dark blue header with the UTSA logo on the left, a dropdown menu for "Employee Self Service" in the center, and navigation icons (home, search, flag, menu, refresh) on the right. The main content area is a grid of white tiles on a dark blue background. The tiles are organized as follows:

- UTSA Announcements:** Contains two announcements from Carlos Gonzales. The first is "IMPORTANT - Pay Advice ESS Instructions" and the second is "REMINDER: Notice to all benefits eligible employees regar ...".
- Financials Approvals:** Shows a document icon with a green checkmark and a red "1" in the bottom right corner.
- HRMS Approvals:** Shows a document icon with a green checkmark and a red "0" in the bottom right corner.
- My Reports:** Features the Oracle PeopleSoft logo.
- Expenses:** Displays the message "You are not authorized for this page."
- Payroll and Compensation:** Shows a green icon of a stack of money with a dollar sign.
- Personal Details:** Features a gray placeholder icon for a person's profile.
- Talent Profile:** Shows a green person icon with a yellow star.
- Time and Attendance:** Shows a person icon with a clock.
- Benefits Summary:** Shows icons for a person, a house, a plus sign, and a gear.
- UTSA Business Solutions Center:** Features logos for "Rowdy Exchange" (blue) and "Xtender" (red).
- eForms:** Shows a clipboard icon with a checklist.

# Navigation

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

# Navigation

Center Navigation

Home Button

The screenshot displays the UTSA Employee Self Service portal interface. The top navigation bar includes the UTSA logo on the left and a menu with a home icon, search, and user profile icons on the right. The main content area is a grid of tiles. Annotations include: a yellow box labeled 'Center Navigation' pointing to the 'Employee Self Service' dropdown menu; a yellow box labeled 'Home Button' pointing to the home icon in the top right; a yellow box labeled 'Compass/NavBar' pointing to the top right navigation area; and a yellow box labeled 'Tile' pointing to the 'Time and Attendance' tile in the grid.

Employee Self Service

UTSA Announcements

- IMPORTANT - Pay Advice ESS Instructions  
Carlos Gonzales.
- REMINDER: Notice to all benefits eligible employees regar ...  
Carlos Gonzales.

Financials Approvals 1

HRMS Approvals 0

My Reports

Expenses  
You are not authorized for this page.

Payroll and Compensation

Personal Details

Talent Profile

Time and Attendance

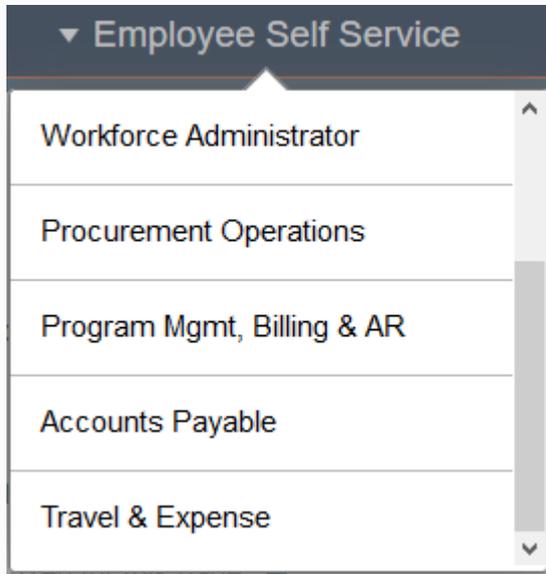
Benefits Summary

UTSA Business Solutions Center

- Rowdy Exchange
- Xtender

eForms

# Center Navigation



- Allows a person to navigate to a group of related tiles

# Tiles

▼ Accounts Payable

<b>Financials Approvals</b>  1	<b>Voucher Entry</b> 	<b>Matching Workbench</b> 
<b>Pay Cycle Manager</b> 	<b>Voucher Build</b> 	<b>Supplier Inquiry</b> 
<b>Review Purchase Order</b> 	<b>Tiles allow a person to navigate to a page</b>	

# Page

 **Accounts Payable**

**Voucher**

[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

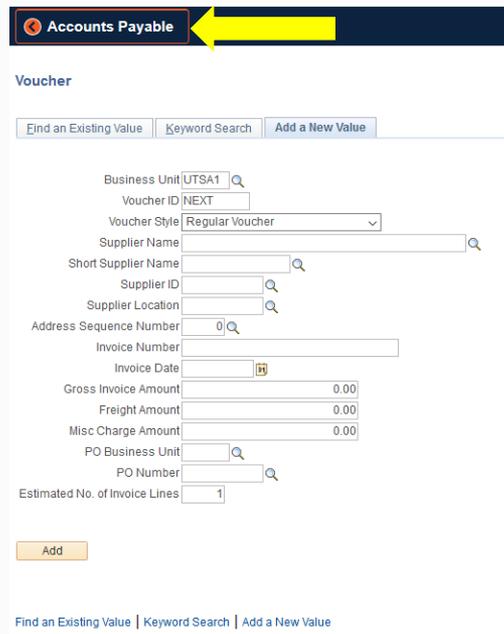
Business Unit	<input type="text" value="UTSA1"/>	
Voucher ID	<input type="text" value="NEXT"/>	
Voucher Style	<input type="text" value="Regular Voucher"/>	
Supplier Name	<input type="text"/>	
Short Supplier Name	<input type="text"/>	
Supplier ID	<input type="text"/>	
Supplier Location	<input type="text"/>	
Address Sequence Number	<input type="text" value="0"/>	
Invoice Number	<input type="text"/>	
Invoice Date	<input type="text"/>	
Gross Invoice Amount	<input type="text"/>	0.00
Freight Amount	<input type="text"/>	0.00
Misc Charge Amount	<input type="text"/>	0.00
PO Business Unit	<input type="text"/>	
PO Number	<input type="text"/>	
Estimated No. of Invoice Lines	<input type="text" value="1"/>	

[Add](#)

[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

# Back Button

- PeopleSoft Fluid allows a person to go back a page to the module landing page

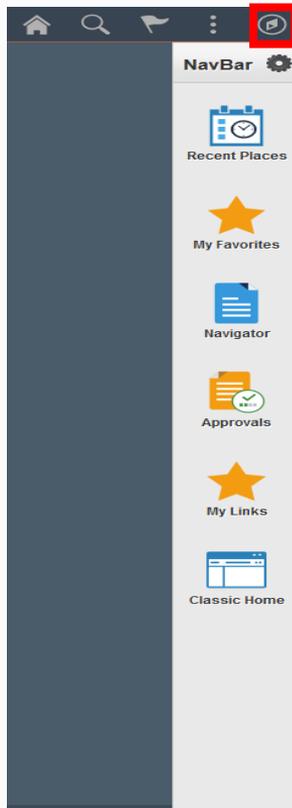


The screenshot shows the 'Accounts Payable' module landing page in PeopleSoft Fluid. A yellow arrow points to the 'Accounts Payable' breadcrumb at the top left. Below the breadcrumb is the 'Voucher' form. The form includes a navigation bar with 'Find an Existing Value', 'Keyword Search', and 'Add a New Value' buttons. The form fields are:

Business Unit	UTSA1	Q
Voucher ID	NEXT	
Voucher Style	Regular Voucher	v
Supplier Name		Q
Short Supplier Name		Q
Supplier ID		Q
Supplier Location		Q
Address Sequence Number	0	Q
Invoice Number		
Invoice Date		BY
Gross Invoice Amount		0.00
Freight Amount		0.00
Misc Charge Amount		0.00
PO Business Unit		Q
PO Number		Q
Estimated No. of Invoice Lines	1	

At the bottom of the form is an 'Add' button. Below the form is a navigation bar with 'Find an Existing Value', 'Keyword Search', and 'Add a New Value' buttons.

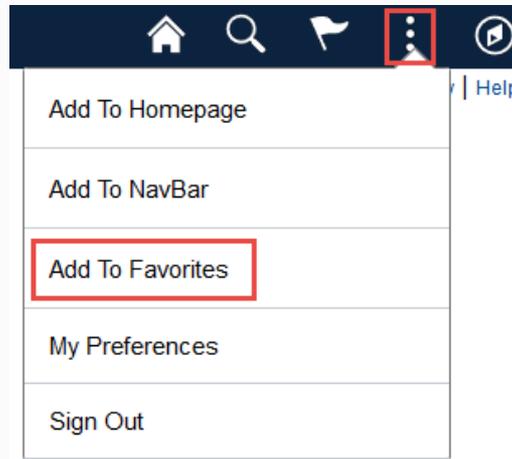
# Compass / NavBar



- 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

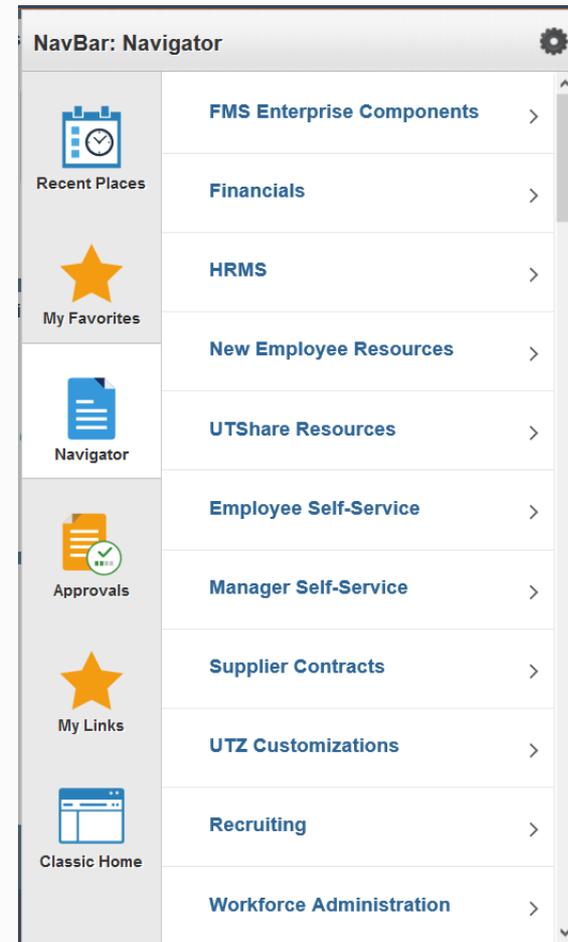
# Adding Favorites

- Navigate to the page using the Tiles or NavBar
- Click on the three vertical dots and select “Add To Favorites”



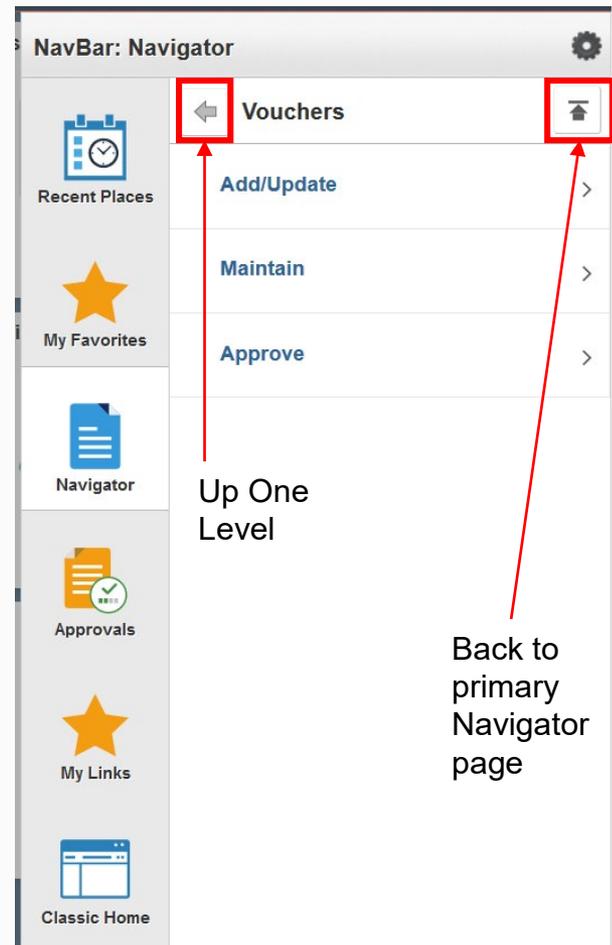
# Navigator

- 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

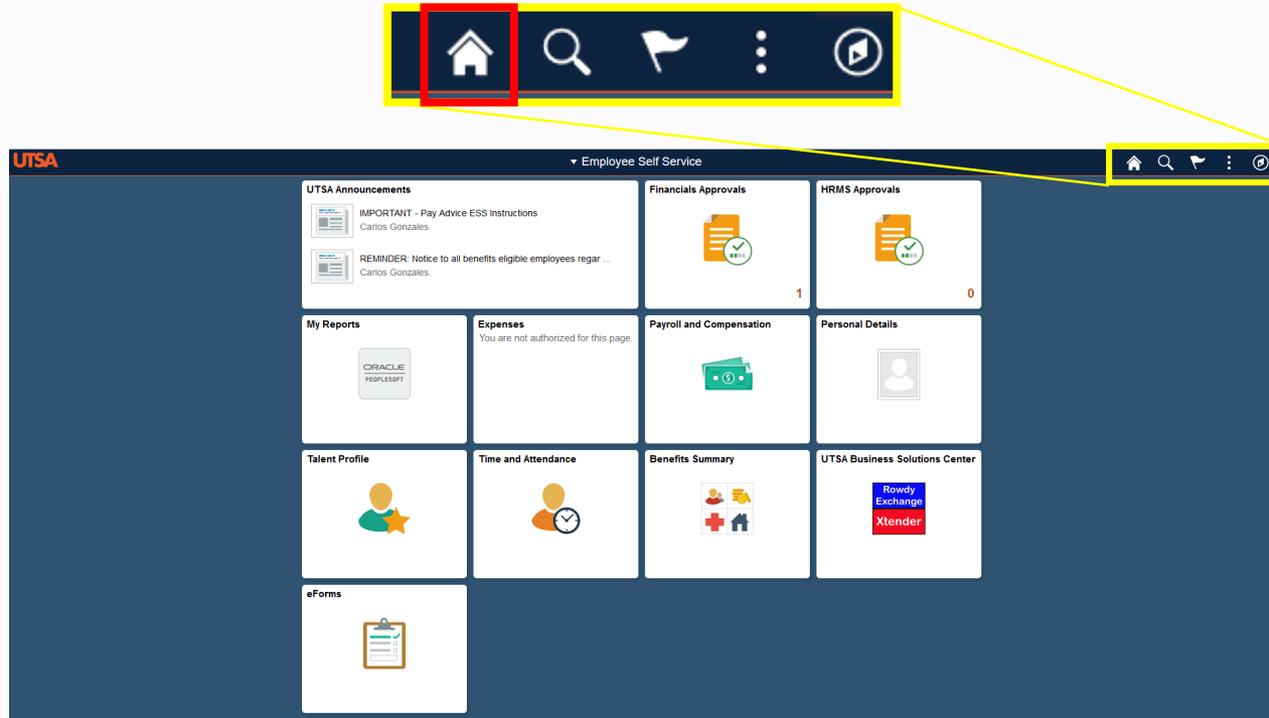


# Navigator

- 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



# Home Button



- 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

A screenshot of the Employee Self Service search results page. The top left has a blue header with a back arrow and the text "Employee Self Service". The top right has a dark blue header with the text "Search Results". On the left side, there is a sidebar with a "New Search" button and a "Folder" dropdown menu containing "Accounts Payable (1)" and "Set Up Financials/Supply Chain (1)". The main content area is titled "View Search Results" and shows "2 results for keyword: 'regular entry'". The results are listed as follows:

- Regular Entry**  
Enter standard invoices and invoices associated with a purchase order.  
Application: PS PA - Local Node
- Session Defaults**  
Define session defaults for the quick invoice and regular voucher entry.  
Application: PS PA - Local Node

# 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

# Travel & Expense

▼ Travel & Expense

Financials Approvals



1

Classic Approval



Create Travel Authorization



Create Cash Advance



Create Expense Report



Travel and Expense Center



# 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

▼ Accounts Payable

<b>Financials Approvals</b>  1	<b>Voucher Entry</b> 	<b>Matching Workbench</b> 
<b>Pay Cycle Manager</b> 	<b>Voucher Build</b> 	<b>Supplier Inquiry</b> 
<b>Review Purchase Order</b> 		

# 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

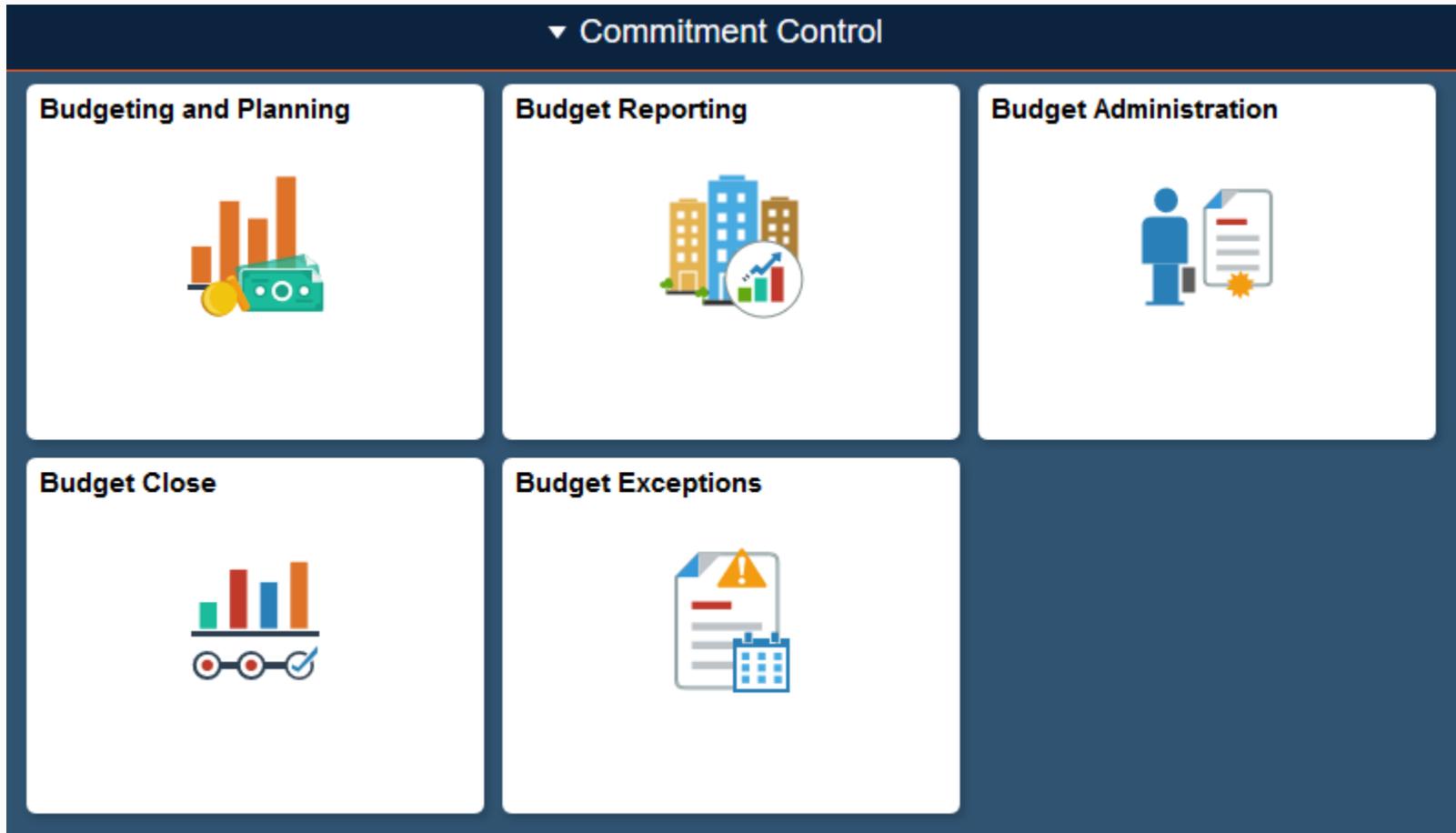
*UTSA will continue to use Rowdy Exchange  
to create requisitions*



# 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 Mgmt & Cap. 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

▼ 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 –PROJ\_RESOURCE
- 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



# 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

▼ Treasury

## Journal Inquiry



## GL Reporting



## Treasury Operations



## PeopleSoft GL Reports

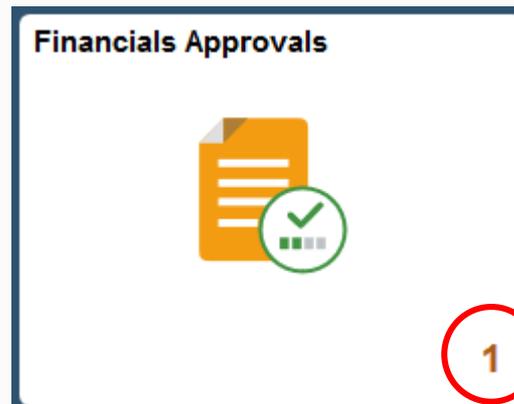


## Custom GL Reports



# 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

Employee Self Service Pending Approvals

View By Type

- All 1
- Expense Report 1

All		1 row	
Expense Report	29.99 USD	Dennis Layman - 0000234570 / PURCHASE OFFICE SUPPLIES ⚠ Medium Priority	Routed 10/24/2019 >

Document type  
can be selected  
from the left side  
of the screen

Click to select document to review

# Approvals

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

**Pending Approvals** Expense Report

Dennis Layman  
29.99 USD

Header is pending your approval  
In Process

**Summary**

Name	Dennis Layman	Report ID	0000234570	Submitted for Approval
Total Due Employee	29.99 USD	Reference		
Report Description	PURCHASE OFFICE SUPPLIES	Submission Date	10/24/19	
Business Purpose	NT-Other (Specify)	Updated on	10/24/19 - 11:58 AM	
Location		Exceptions and Risks		
		Expense Details		

▼ Lines 1 row

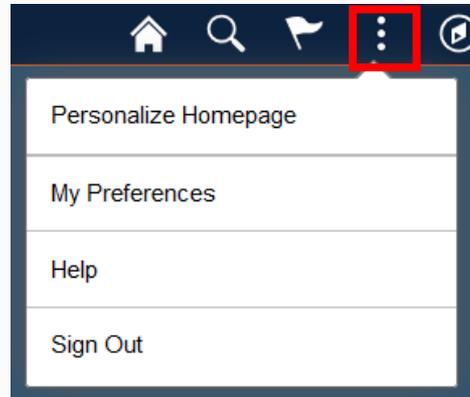
Risk/Exception	Date/Expense Type	Reimbursement Amount
	10/24/19 NT-Business Meeting Expense	29.99 USD

Approver Comments

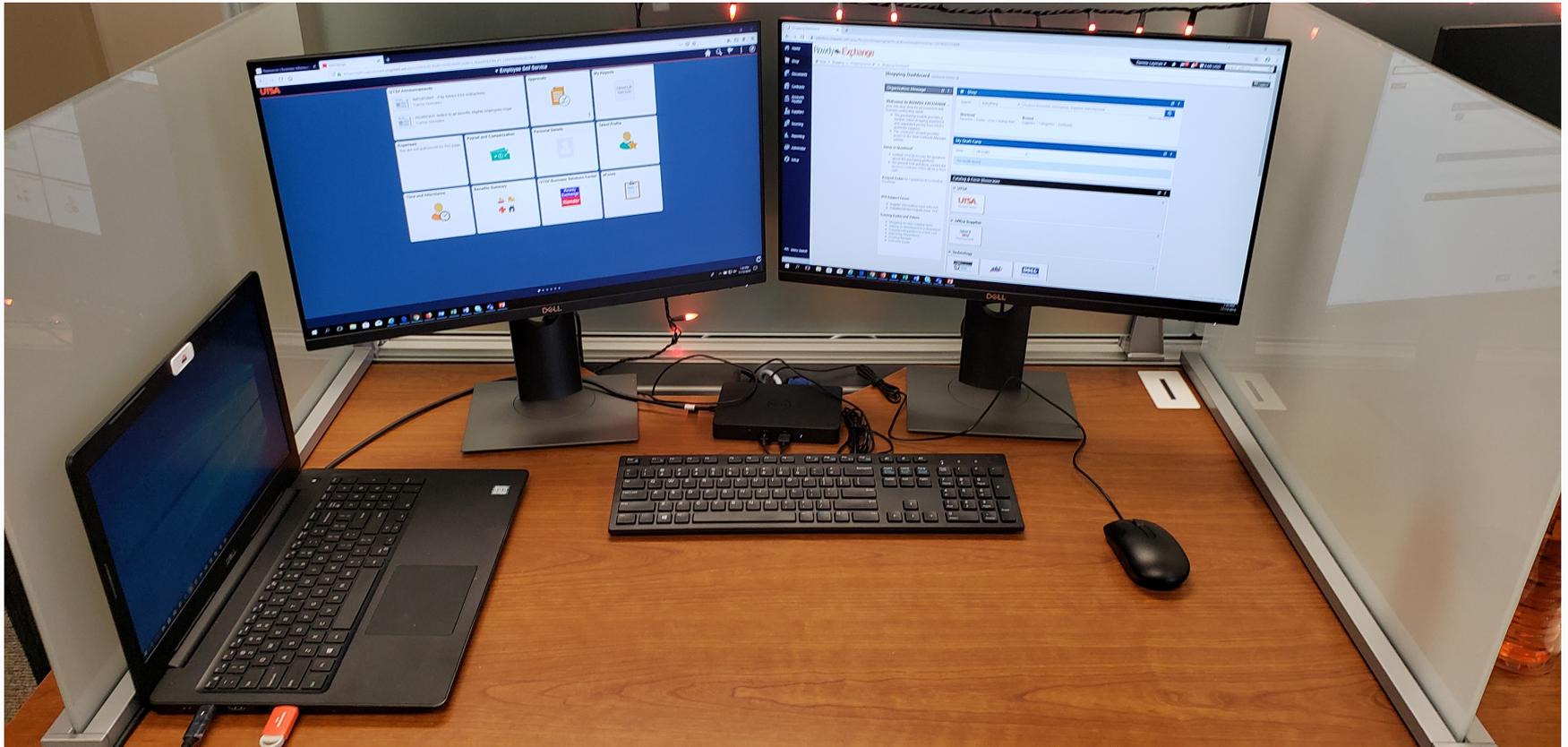
Approval Chain

# 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/](https://utsa.edu/bis/psupgrade/)

The screenshot shows the UTSA Business Information Services website. The header features the UTSA 50th anniversary logo (1969-2019) and the text "UTSA The University of Texas at San Antonio". Navigation links include "About", "Admissions", "Academics", "Research", "Campus Life", "Giving", "Athletics", "Alumni", and "News". A secondary navigation bar includes "myUTSA", "UTSA Today", "Visit", "Directory", and "Search".

The main content area is titled "Business Information Services" and includes a breadcrumb trail: "Business Information Services > PS Upgrade". A dark blue navigation bar contains links for "Home", "About Us", "Services", "Support", "Resources", "Intra", and "PS Upgrade".

The "PS Upgrade" link is highlighted in the left sidebar. The main content area features a heading: "Coming Soon: PeopleSoft 9.2 User Interface Updates Launches December 9". Below this is a sub-heading: "Prep Yourself for the Upcoming PeopleSoft 9.2 User Interface Updates".

The text reads: "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 of 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."

A quote follows: "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?

