PeopleSoft New Look & Feel
Agenda

- PeopleSoft Overview
- New PeopleSoft Layout & Navigation
- Menu style navigation
- Upgrade scheduled outage
- Key training dates
- Additional resources
- Upcoming changes
- Appendix: (Adding to My Favorites)
PeopleSoft Overview

• How will the upgrade impact UTEP?
  – A new layout on the PeopleSoft main page
  – System navigation has changed
  – Functionality and processing will **not** change
  – Seamless user-experience that allows you to work on smart phones, tablets, and desktops/laptops
PeopleSoft Layout & Navigation
1. **Blue Banner**: Header appearing across all pages. Users have constant access to all Homepages & the Tool Bar.

2. **Homepage**: Starting point for navigation with focus on Tiles.

3. **Tiles**: Allow users a quick way to perform routine tasks. Tiles give users access to targeted pages or a collection of navigations to perform tasks.

4. **Tool Bar**: Used to perform specific actions across all pages.
Navigation Options

1. **Using Homepage: (dropdown)**
   a) Select a Homepage from dropdown
   b) Select a Tile to open page or other links

2. **Using Tool Bar:**
   - **Home**: Used to return to Homepage
   - **Global Search**: Universal search to find content
   - **Notifications**: View actions & alerts in window
   - **Actions List**: Displays other available actions
   - **NavBar**: Additional navigation options

3. **Using NavBar: (dropdown)**
   - **Recent Places**: Links to recently visited pages
   - **My Favorites**: Links to New Fluid pages saved
   - **Navigator**: Menu style navigation option
   - **My Links**: Previously saved links
   - **Financials Approvals**: Pending approval docs
Employee Self Service
Homepage & Tiles
The **Employee Self Service** homepage is the default Fluid Homepage you first see when you log into PeopleSoft.
Payroll and Compensation Tile:
- Shows a navigation collection of various Payroll and Compensation pages.
- Allows you to view paychecks, direct deposit, W4 and W2 information.
Time and Attendance Tile:
- Shows a navigation collection of various time and attendance pages.
- Allows you to View Requests for leave and Absence Balances.
UTEP Careers Tile: Allows you to view and apply for campus job postings.
Benefits Summary Tile:
- Benefits Summary and Dependent/Beneficiary Info links displays your personal information
- Shows a navigation collection of web site links to the various benefit providers.
My Reports Tile:
- Allows you to view and open reports processed regularly like the monthly Account Reconciliation reports.
- Please remember to update the Date Range and select Refresh.
Performance Tile:

- **My Current Documents** - shows evaluations for the upcoming cycle. Process begins in January - stay tuned.
- **My Historical Documents** - shows your prior year employee evaluation documents.
**eForms Tile:**
- Used to view, create or modify electronic separation and position funding change requests.
- Approvers will also use this tile to approve all pending eForm documents.
Financials Approvals Tile:
Used to review and approve pending documents: Expense Reports, Travel Authorizations, and Vouchers.

1. The Approvals Tile identifies how many documents are awaiting approval.
2. The Pending Approvals page separates pending documents by:
   a) All - approver sees all pending documents (RECOMMENDED)
   b) Expense Report - only sees Expense Reports
   c) Travel Authorization - only sees Travel Authorizations
   d) Voucher - only sees Vouchers
3. Select individual document lines to review & approve.
Menu Style Navigation
Using the NavBar

Example: Navigating to the “Voucher Search” page using NavBar

1. From any Homepage, you can select the **NavBar** icon located on the Tool Bar.
2. Select **Navigator** icon form the NavBar dropdown list.
3. Scroll down the **Navigator** menu options and select the **Accounts Payable** link.

**Note:** Working on getting list in alphabetical order
Using Navigator Tile Menu

Example: Navigating to the “Voucher Search” page using NavBar

4. Click on **Vouchers**.
5. Click on **Add/Update**.
6. Click on **Voucher Search**.
Navigating to Page

Example: Navigating to the “Voucher Search” page using NavBar

7. The Voucher Search Page will be displayed.

PeopleSoft Tips:
- For an easier and faster navigation, you can save pages to “My Favorites” on the NavBar. Please review the Appendix at the end of this presentation.
Upgrade Scheduled Outage

- **(Tue) Dec 3\(^{rd}\) 5:00 PM**
  - Disabling access to create:
    - Travel Authorizations, Expense Reports, Non-PO Vouchers
  - Need your assistance in ensuring all existing documents are approved by the department before Friday outage

- **(Fri) Dec 6\(^{th}\) 5:00 PM to (Mon) Dec 9\(^{th}\)**
  - PeopleSoft will be unavailable for the upgrade.

- **(Mon) Dec 9\(^{th}\)**
  - Additional notifications will be sent when system is online
Training Dates

• **Overview Training Sessions: Blumberg Auditorium**
  - Dec 4\(^{th}\), 2:00-3:00
  - Dec 5\(^{th}\), 10:00-11:00
  - Dec 10\(^{th}\), 2:00-3:00

• **Hands on Work Sessions: Vowell Hall 103**
  - Dec 3\(^{rd}\), 2:00-3:00
  - Dec 6\(^{th}\), 10:00-11:00
  - Dec 11\(^{th}\), 10-11:00
**Additional Resources**

- Additional information and resources can be found on the PeopleSoft website.
  - Quick Guides
  - Power Point Presentation
  - Videos (in process)

[www.peoplesoft.utep.edu](http://www.peoplesoft.utep.edu)
Upcoming Changes

• **Staff Evaluations**
  – New look and feel
  – Coming in January 2020

• **eForms (Phase II)**
  – Primarily handling hire process, transfers, changes to job or position
  – More to come, starting of Spring 2020

• **New Account Recon Process**
  – New electronic reconciliation process
  – More to come, starting late Spring/ Early Summer 2020
Thank You!
Appendix: Adding/Deleting pages to My Favorites
Adding to My Favorites

Example: Adding “Voucher Search” page to Favorites in NavBar

1. Make sure you are on the Page you want to add.
2. Click the **Action List** icon from the Tool Bar.
3. Select **Add To Favorites** option from the Tool Bar dropdown menu.
4. Click **OK** (type a new description name or keep the original one).
Deleting from My Favorites

Example: Deleting “Voucher Search” page from Favorites in NavBar

1. Click the **NavBar** icon from the Tool Bar.
2. Click **My Favorites** icon from the NavBar dropdown list.
3. Click **Edit Favorites** link from the menu.
4. Click on the **Delete** button to delete line.
5. A pop up image will appear and then click the **OK** button to confirm.
6. Click **Save** button to update.