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)**
   - **Financials Approvals**: Pending Financial approval docs
   - **HRMS Approvals**: Pending HRMS approval docs
   - **Recent Places**: Links to recently visited pages
   - **My Favorites**: Links to New Fluid pages save
   - **Navigator**: Menu style navigation option
   - **My Links**: Previously saved links
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.

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Document Status</th>
<th>Period Begin / Period End</th>
<th>Next Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>UTEP Performance Evaluation</td>
<td>Evaluation in Progress</td>
<td>01/01/2019</td>
<td>12/31/2019</td>
</tr>
</tbody>
</table>
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

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. From the **Navigator** menu options select the **Financials** link.

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

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

1. Click on Accounts Payable.
2. Click on Vouchers.
3. Click on Add/Update.
4. Click on Voucher Search.
Navigating to Page

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

8. 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 4th, 2:00-3:00
  – Dec 5th, 10:00-11:00
  – Dec 10th, 2:00-3:00

• **Hands on Work Sessions: Vowell Hall 103**
  – Dec 3rd, 2:00-3:00
  – Dec 6th, 10:00-11:00
  – Dec 11th, 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
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 **-** 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.