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. **Homepage**: Starting point for navigation in PeopleSoft. Multiple home pages are available and house a specific group of tiles organized by business function.

2. **Search in Menu**: Universal search to find PeopleSoft content.

3. **Notifications Panel**: Displays current notifications for items that require action and provides alerts for actions taken.

4. **Recently Visited**: Recently viewed pages.

5. **Favorites**: Pages that have been marked as favorites.
PeopleSoft Tile Layout

6. **NavBar**: Under the NavBar you will now see a **Menu** tile, previously known as the Navigator tile, this navigation option allows access to navigation collections for pages in PeopleSoft.
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 PeopleSoft Homepage.
   - **Notifications:** View actions & alerts in window.
   - **Actions:** Displays other available actions. [e.g. Sign out]
   - **NavBar:** Provides navigation options. [e.g. Menu]

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
   - **Menu:** 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 Historical Documents** - shows your prior year employee evaluation documents.

**My Current 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 Navigation Bar (NavBar) icon located on the Tool Bar.
2. Select Menu icon from the NavBar dropdown list.
3. From the Menu options select the Financials link.
Using Navigator Tile Menu

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

4. Click on Accounts Payable.
5. Click on Vouchers.
6. Click on Add/Update.
7. 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.
Additional Resources

- Additional information and resources can be found on the PeopleSoft website.
  - Quick Guides
  - Power Point Presentation

www.peoplesoft.utep.edu
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. Select the **Action List** icon from the Tool Bar.
3. Select **Add To Favorites** option from the Tool Bar dropdown menu.
4. A description name will show as a default, but it can be changed, select the **Add** hyperlink.
5. Select **OK** on the confirmation pop-up, the page will be saved as a new favorite.
Deleting from My Favorites

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

1. Select the **Navbar** icon from the Tool Bar.
2. Select **My Favorites**.
3. Select **Edit Favorites** link from the menu.
4. Select the checkbox to delete the line.
5. A pop-up image will appear, click the **OK** button to confirm.
6. Select **Save** button to update.