



# PEOPLESOFT FINANCE FLUID

## Your Favorites in Fluid

### Quick Guide

Improve your working style with  
PeopleSoft Fluid Upgrade



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## Favorites / Bookmarks

After the Fluid upgrade, your old bookmarks / favorites will migrate to fluid, but there is a caveat. Bookmarks that are replaced with a Fluid page will not be accessible.

The screenshot displays the 'Employee Self Service' interface. On the left, a 'Favorites' dropdown menu is open, showing a list of 'Recently Used' items and 'My Favorites'. The 'My Favorites' list includes: Add to Favorites, Edit Favorites, ACM Dashboard, Basic Add, Inspect Receipts, Print an Asset, Query Manager, Retire/Reinstate Non-Fin Asset, Review Cost, Process Receipts, Load Assets Request, Preview AP/PO Information, Retrieve Info from AP/PO, and Load Transactions into AM. The main content area shows the 'eProcurement' section with a shopping cart icon. On the right, the 'NavBar: My Favorites' section is visible, containing icons for 'Recent Places', 'My Favorites', 'Navigator', 'Approvals', 'Expenses', and 'My Preferences', along with a list of favorite items: Edit Favorites, Basic Add, Inspect Receipts, Print an Asset, Query Manager, Retire/Reinstate Non-Fin Asset, Review Cost, Process Receipts, Load Assets Request, Preview AP/PO Information, Retrieve Info from AP/PO, and Load Transactions into AM. The bottom of the NavBar shows a 'Classic Home' icon.



## Where are your Favorites / Bookmarks?



To find your bookmarks, click on the NavBar icon (the compass) in the top right banner.

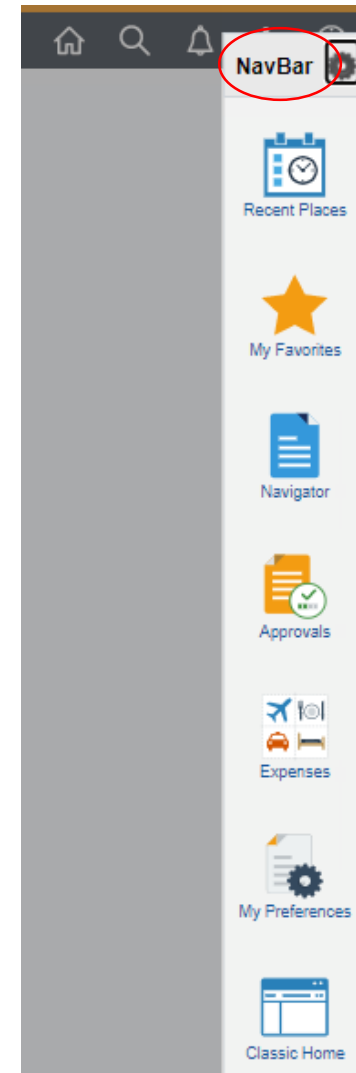




## The Fluid NavBar



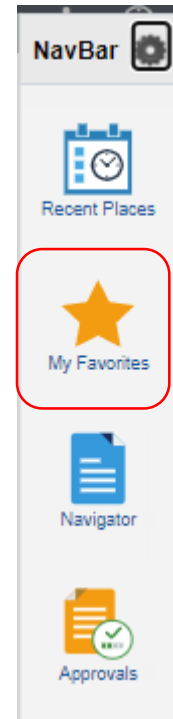
After you click the NavBar icon (the compass), the NavBar expands on the right side of your screen.





## Your Favorites / Bookmarks on the NavBar

Simply click on the My Favorites icon (the star) to display your Favorites / Bookmarks.





## The My Favorites Icon

After you click the My Favorites link, the NavBar expands further to display links to your bookmarks.



NavBar: My Favorites

- Recent Places
- My Favorites**
- Navigator
- Approvals
- Expenses
- Edit Favorites
- Budgets Overview
- ChartField Values
- Create/Update Journal Entries
- Grants WorkCenter
- Ledger
- Query Manager
- SpeedTypes



## Adding a New Favorite

Fluid makes it easy to add pages to your favorites.

Navigate to your page.

- Click the Actions button (the stacked ellipses or “hamburger” icon) on the top right banner.



- Click the link to “Add to Favorites”
- Click the link to “Add” your favorite.
- Click OK to confirm.

The image illustrates the process of adding a new favorite in the Fluid interface. It shows a sequence of steps:

- Click the Actions button (the stacked ellipses or “hamburger” icon) on the top right banner.
- Click the link to “Add to Favorites” in the dropdown menu.
- Click the link to “Add” your favorite in the “Add To Favorites” dialog box.
- Click OK to confirm.

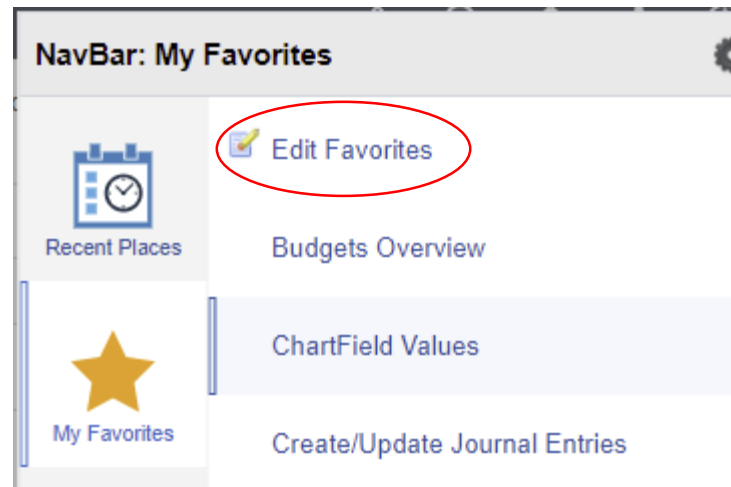




## Editing and Deleting Favorites

Fluid makes it easy to edit and delete from My Favorites.

To delete a favorite or change the display order of your favorites, simply click the Edit Favorites link.





## Deleting a Favorite

Fluid makes it easy to edit your Favorites.

To Delete a Favorite:

- Select the item from the list by clicking the checkbox.
- Click the Delete Selected button.
- Save your changes.

**Edit Favorites** 🏠 🔍 🔔 ⋮ ⌛

Select the Save button after editing or deleting favorites to apply your changes. **Save**

**Favorites** 7 rows

**Delete Selected**

<input type="checkbox"/> *Favorite	Sequence number
<input checked="" type="checkbox"/> Budgets Overview	0
<input type="checkbox"/> ChartField Values	0
<input type="checkbox"/> Create/Update Journal Entries	0
<input type="checkbox"/> Grants WorkCenter	0
<input type="checkbox"/> Ledger	0
<input type="checkbox"/> Query Manager	0
<input type="checkbox"/> SpeedTypes	0



## Editing Your Favorites

Fluid makes it easy to edit your Favorites.

To change the order of a Favorite:

- Update the sequence numbers in the text boxes.
- Save your changes.

### Edit Favorites

Select the Save button after editing or deleting favorites to apply your changes.



**Favorites** 3 rows

<input type="checkbox"/> *Favorite	Sequence number
<input type="checkbox"/> Define Spreadsheet Template	<input type="text" value="2"/>
<input type="checkbox"/> Requisition	<input type="text" value="3"/>
<input type="checkbox"/> User Profiles	<input type="text" value="1"/>