



# PEOPLESOFT FINANCE FLUID QUICK NAVIGATION GUIDE

Improve your working style with  
PeopleSoft Fluid Upgrade













# Navigation with the Banner



# What is on the Banner?

## 1. Useful Icons at the top of every page

My Homepage     	
	<b>Home Button</b> Use the Home button to return to your default homepage, which is the homepage that you arrive at immediately upon signon.
	<b>Search Button</b> Use to perform global searches. Click the Global Search icon to display the Global Search bar, where you select a search category and enter search criteria in the search edit box.
	<b>Notifications Button</b> Use this button to display the Notification window showing any pending actions or alerts. When you tap the Notifications button, the Notification window is displayed below. The system continues to update notifications as they occur in real time while you are working on your tasks.
	<b>Actions Button</b> Use to display the navigation bar (NavBar). The Actions button, also called the "Hamburger" menu icon, displays a list of actions like personalizing your homepage, adding a tile to a homepage, or setting your preferences. It also provides the option to Sign Out of the application.
	<b>NavBar Button (the Compass icon)</b> Use to display the navigation bar (NavBar). Some of the items contained on the NavBar are: <ul style="list-style-type: none"><li>• Recent Places</li><li>• My Favorites</li><li>• Navigator</li><li>• Approvals</li><li>• My Preferences</li><li>• Classic Home</li></ul>



# What is on the Banner?

## 2. Homepage Selector or Page Title

▼ Finance & Accounting	
▼ Finance & Accounting	<b>Homepage Selector</b> Homepages are the starting point for navigation in Fluid. You can have several homepages.  To change to another homepage, click on the drop-down selector and click on the link to the homepage you want to view.  One homepage will be your default that is displayed when you log into Fluid, but you can change the default. You can also create your own custom homepage.  There is no Back button on homepages since you are at the root for that homepage.
Employee Self Service	
Finance & Accounting	
Grants Management	
Customer Contracts	
Procurement Operations	
← Finance & Accounting      General Ledger	
<b>Page Title</b> If you are not on a homepage, the Homepage Selector is not visible. The title of the page you are viewing is displayed in the middle of the banner.  You can return to the homepage by clicking the Back button on the left side of the banner, or you can click the Home icon on the right side of the banner.	



# What is on the Banner?

## 3. Back Button


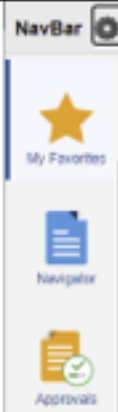
<p>&lt; Finance &amp; Accounting</p>	<p>General Ledger</p> <p>🏠 🔍 🔔 ⋮ ⌘</p>
<p>&lt; Finance Accounting</p>	<p><b>Back Button</b></p> <p>On the main page of a Fluid transaction, a Back button should appear in the left side of the banner.</p> <p>The Back button allows you to return to the place from which you entered the current page.</p> <p>The Back button is not available from homepages.</p>



# Using Your NavBar







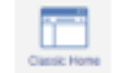
# Navigation with the NavBar

▼ Finance & Accounting <span>🏠 🔍 🔔 ⋮ ⌘</span>	
<b>NavBar</b>	
	To access the NavBar, click the compass icon on the right side of the banner.
	The NavBar is displayed



# What is on the NavBar?

1. Recent Places
2. My Favorites
3. Navigator
4. Tiles
5. Classic Home

The NavBar contains the following elements:	
 Recent Places	<b>Recent Places</b> The Recent Places tile in the NavBar stores a list of recently visited pages. You can easily navigate back to the components from this list.
 My Favorites	<b>My Favorites</b> The My Favorites tile in the NavBar stores a list of pages you have marked as Favorites. You can choose frequently visited pages and add them to the list for easy access.
 Navigator	<b>Navigator</b> The Navigator provides navigation access to all components in Fluid. The primary method for Fluid navigation is via Homepages, and we encourage you to utilize Homepages. The Navigator is provided to support legacy PeopleSoft hierarchical navigation to Classic components.
 Approvals	<b>Tiles</b> NavBar tiles provide access to the most frequently used functionality in Fluid.
 Classic Home	<b>Classic Home</b> Classic Home is provided as a reference. The primary method for Fluid navigation is via Homepages, and we encourage you to utilize Homepages.









## Recent Places

1. Click on the Navigator icon (the compass) on the right side of the banner.
2. Click on the Recent Places tile.
3. The list of recent pages you have visited is displayed.
4. Clicking one of the links will take you to your page.



NavBar: Recent Places 

 Recent Places	<a href="#">Asset Depreciation</a>
 My Favorites	<a href="#">Load Assets Request</a>
 Navigator	<a href="#">Asset Component Hierarchy Move</a>
	<a href="#">History</a>
	<a href="#">Procurement Group Inquiry</a>



## My Favorites

1. Click on the Navigator icon (the compass) on the right side of the banner.
2. Click on the My Favorites tile.
3. A listing of pages you have identified as favorites is displayed.
4. Clicking one of the links will take you to your page.



NavBar: My Favorites

Recent Places

My Favorites

Navigator

Edit Favorites

General Ledger

Testing By Proxy

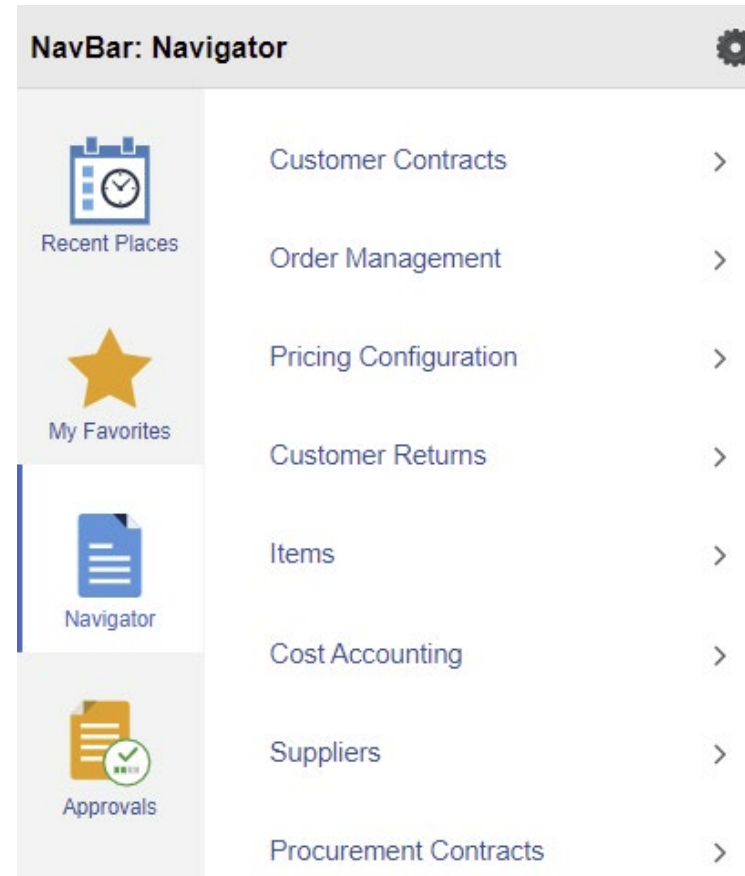
UNTS Utilities

User Profiles

## Navigator



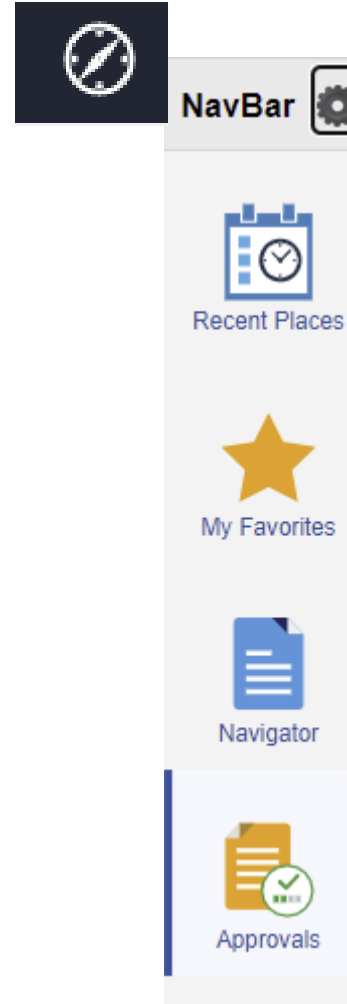
1. Click on the Navigator icon (the compass) on the right side of the banner.
2. Click on the Navigator tile.
3. Navigator displays a hierarchical view of pages, similar to the Classic view.
4. You can use Navigator to locate your page.





## Tiles - Approvals

1. Useful tiles (Approvals for instance) are available to you on the NavBar.
2. Click on the Navigator icon (the compass) on the right side of the banner.
3. Click on the Approvals tile.
4. The Approvals page is displayed.





## Tiles – Classic Home

1. The Classic tile links you to your former PeopleSoft view for reference. While this is an option to help with the upgrade transition, you are encouraged to use the Fluid version.
2. Click on the Navigator icon (the compass) on the right side of the banner.
3. Click on the Classic Home tile.
4. The PeopleSoft Classic view is displayed.

