PEOPLESOF T 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.
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.
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.
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.
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.

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