





Getting to Know Fluid

NDUS – CORE Technology Services

HCM System

December 31, 2018

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First Time Logging In

IMPORTANT: Prior to logging in for the first time, *all* browsers that you use need to have their cache and cookies cleared. Click [here](#) for instructions on how to do this.

NOTE – when clearing your cache/cookies, ensure that *all* boxes are checked in the options.

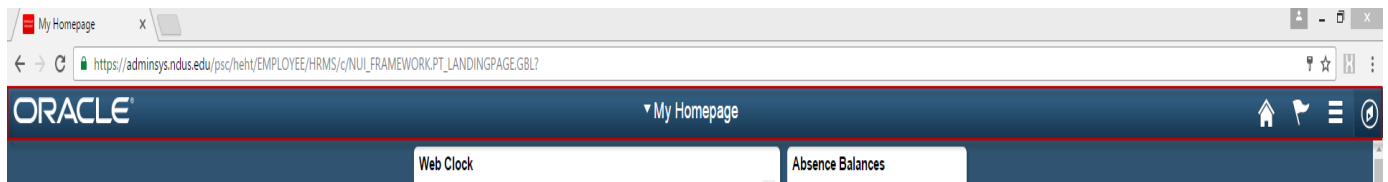
Getting to know Fluid

Designed as a significant improvement over the PeopleSoft “classic” user interface, the PeopleSoft Fluid User Interface utilizes newer web-based technologies that will recognize the device that’s being used and auto-adjust the page layout and formatting—from large screen devices, such as laptops and desktops, to the reduced viewing space of tablets and smartphones.

NOTE – As of go-live (12/19/2016), we currently are *not* using any Fluid pages; everything is still “classic”. We will begin using Fluid pages when HR is upgraded to version 9.2.

Banner

The **red** highlighted area is referred to as the “banner”. This is essentially your menu bar.



Within the banner, there are **6** menu options. See the below table for a quick description on each menu item.

Additional information on the Actions List and NavBar are provided after the table below.

▼ Employee Self Service

Homepage drop-down selection. When there are multiple homepages to which users have access, they switch to other fluid homepages using this drop-down list.



Home button. Use to return to the default homepage, which is the fluid homepage the user arrives at immediately upon sign-on.



Search button. Use to perform Global Search.



Notifications button. Displays the notification window showing any pending actions or alerts.



Actions List button. Use to display the actions menu based on the page you're viewing. Allows user to add/customize home pages and the navigation bar.

** Indicates that the menu option will differ depending on the page the user is currently viewing.*

*Personalize Homepage (when viewing a Homepage): Allows the user to add, remove or move tiles within their Homepage(s).

*Add to Homepage (when viewing a regular page): Adds a tile to the desired homepage, enabling the user to access the fluid page directly from the homepage.

*Add to NavBar (when viewing a regular page): Adds a shortcut to the left-hand side of the NavBar, enabling access to that fluid page directly from the NavBar.

*Add to Favorites (when viewing a regular page): Adds a link to the My Favorites node of the NavBar, as well as the Favorites list available in the classic PIA portal.

My Preferences: Modify settings that control a variety of options in the interface based on your preferences.

Help: Takes the user to the website that contains the UPK videos.

Sign Out: Signs the user out of their instance of PeopleSoft.



Navigation bar button. Use to display the navigation bar (NavBar). access additional navigational options.


Actions List

Personalize Homepage


While viewing a Homepage, the *Personalize Homepage* menu option will display. Click this to customize the tiles on your Homepage.

NOTE – You will first need to add pages/tiles to your “My Homepage” in order for it to be viewable. See the [Add To Homepage](#) section below for instructions.

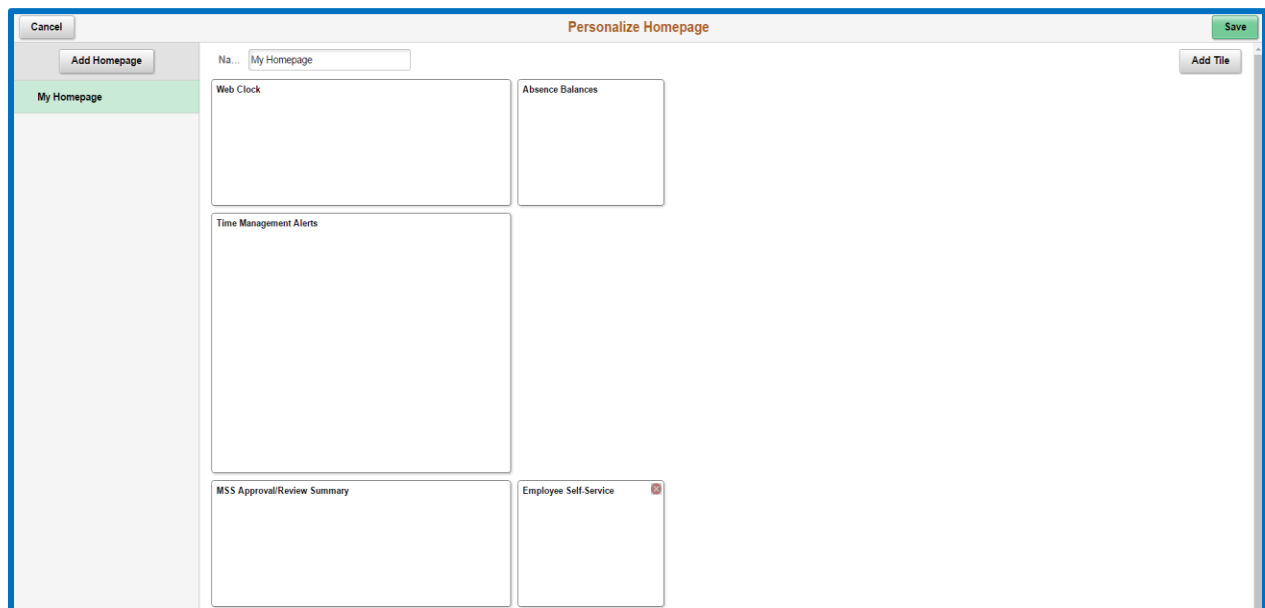
The left pane will display all of the homepages that are available to you. Since we are not currently using any other fluid pages, you will only see *Employee Self Service*, and possibly *My Homepage* (if/when you add pages to it). As more functionality becomes available, additional homepages will be accessible.

Drag and drop the homepages to rearrange them—the top one will be your default landing page (and also where you’ll be taken when clicking the  button).

The right pane displays the tiles/pages that are on the selected homepage. Drag and drop the tiles to rearrange them.

Click  to remove the homepage or tile.

The **Add Tile** button is not going to have many options in it because we are not using Fluid pages at go-live. More options will be available as functionality becomes available.

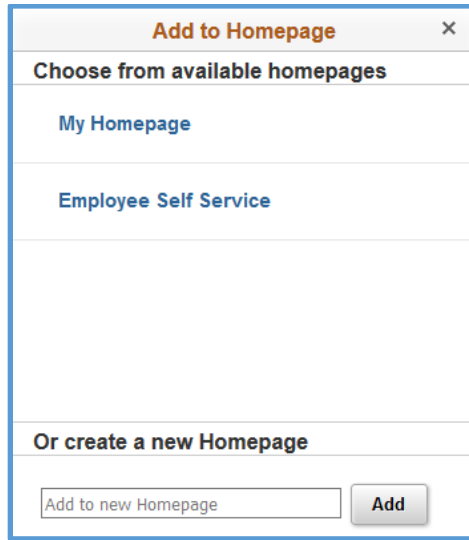


Add To Homepage

Add to Homepage will appear on all pages other than homepages. Click this option and then select which homepage you would like to add the page you’re on to—this will create a tile on that homepage.

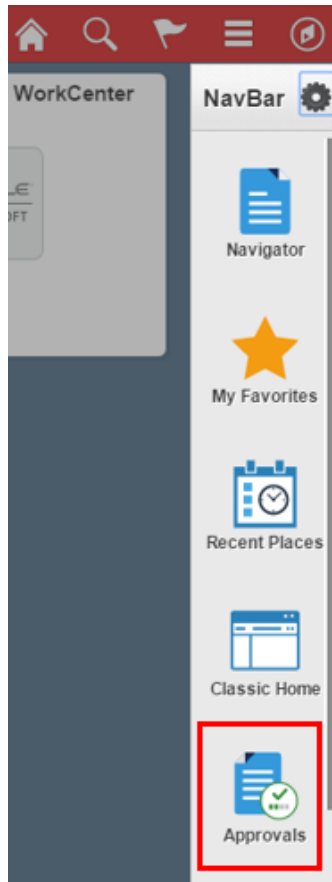
You can also create and name your own homepage—this may be useful if you want to create homepages for different areas that you have access to rather than putting everything on one homepage

(i.e. Job Data, Review Paycheck, Review Actuals Distribution, etc.). To do this, enter a title in the *Or create a new Homepage* section and click **Add**.



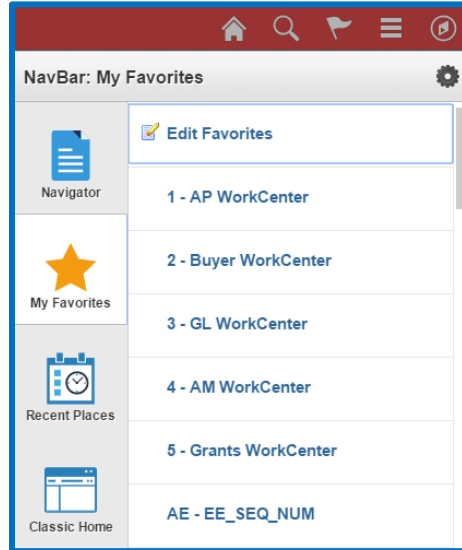
Add To NavBar

Add To NavBar will appear on all pages other than homepages. Click this option to add the page you're on as a tile to the NavBar.




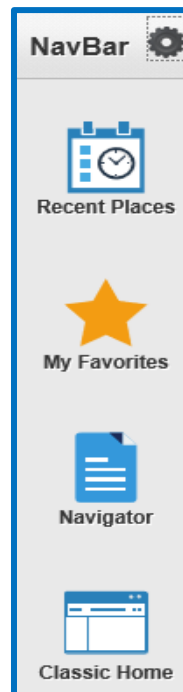
Add To Favorites


Add To Favorites will appear on all pages other than homepages. Click this option to add the page you're on as an item in the *My Favorites* menu in the NavBar. You will be prompted to change the description for the title of the page, if you chose to do so.



NavBar

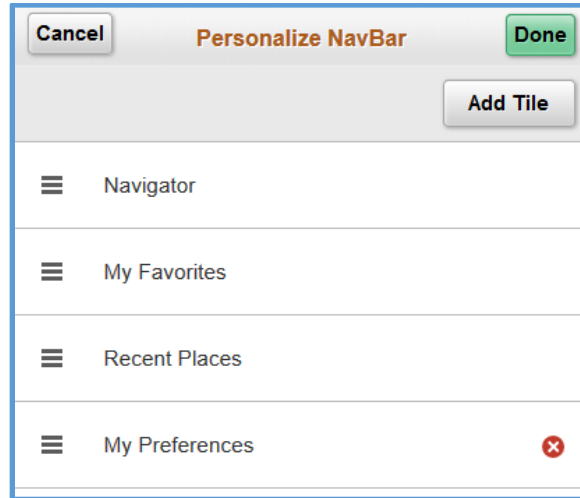
The *NavBar* is Fluid's new menu—similar to the “bread crumbs” from our previous version, but with much more capabilities and versatility. After clicking the NavBar icon, a list of shortcuts is displayed. Click the Personalize NavBar icon  to edit these shortcuts.



Drag and drop the titles to rearrange their display order, or click  to remove it.

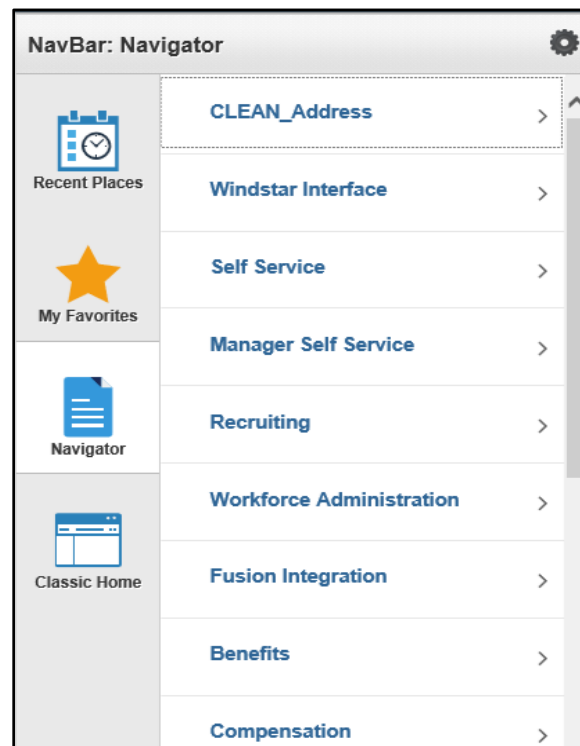
Click **Add Tile** to add delivered Fluid pages. Note that since we are not currently using any Fluid pages, the options are limited. More options will become available as we start using Fluid pages.

Click **Done** to save any changes.



Navigator

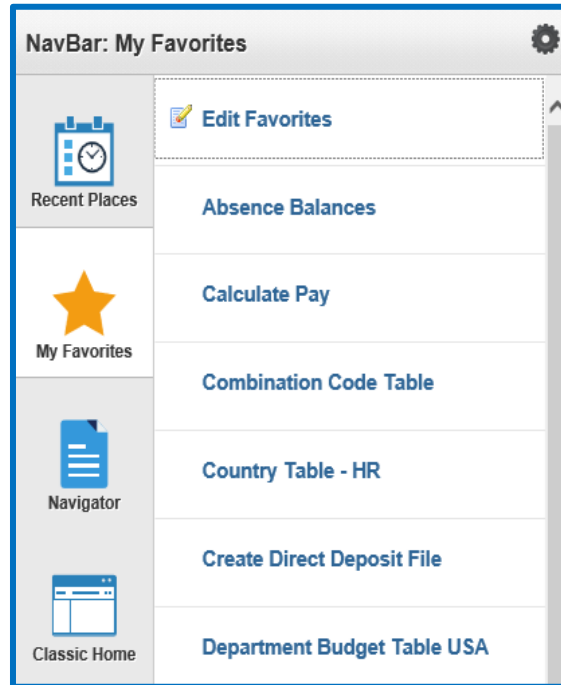
Navigator is the new Fluid "Main Menu." The menu structure is the same order as it was in the classic view. At this time, we are not able to alphabetize this list like we could in the prior version. Future enhancements will allow this capability.



My Favorites

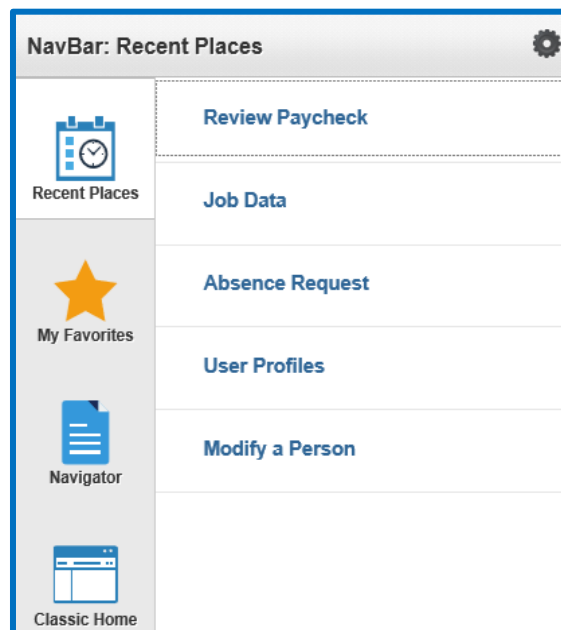
My Favorites is where your favorite shortcuts will appear. All of your favorites from the prior version will be located here.

Click *Edit Favorites* to rename the title, or to change the order sequencing.



Recent Places

Recent Places is similar to the "Recently Used" section at the top of the prior version's Favorites menu. This lists the last 5 pages that you visited.



Classic Home

Classic Home will take you back to the prior version's Home landing page that you were brought to after first logging in. The "bread crumb" menu is no longer available with this version of PeopleTools, so using the *Classic Home* does not provide end users much of a benefit, unless you have personalized this page with different pagelets/dashboards (Contents).

