OKLAHOMA
Office of Management
& Enterprise Services

PEOPLESOFT FINANCIALS 9.2.51

PeopleTools 8.61

User Guide: Navigating the new Fluid User Interface

Last updated: May 2025

Contents

Overview

This guide is intended to:

- Define terminology related to the new user interface screens.
- Address new look and feel of the PeopleSoft Financials upgrade, version 9.2.51.
- Go over some of the new features.
- Provide steps on how to navigate and customize user experience.

New PeopleSoft Financials link: PeopleSoft Financials

New terminology

With new performance improvements comes new terminology. The definitions below are provided to aid the user in understanding the **Fluid** enhancements made to the system. While the definitions are termed here, the functionality of each will be discussed in other sections of this guide.

What is Fluid?

PeopleSoft Fluid User Interface (Fluid UI) is a modern, responsive user interface that provides the flexibility to work seamlessly from desktops, tablets and phones. Fluid navigation uses homepages and tiles as the starting point for navigation to both the new Fluid UI and the Classic Home view.

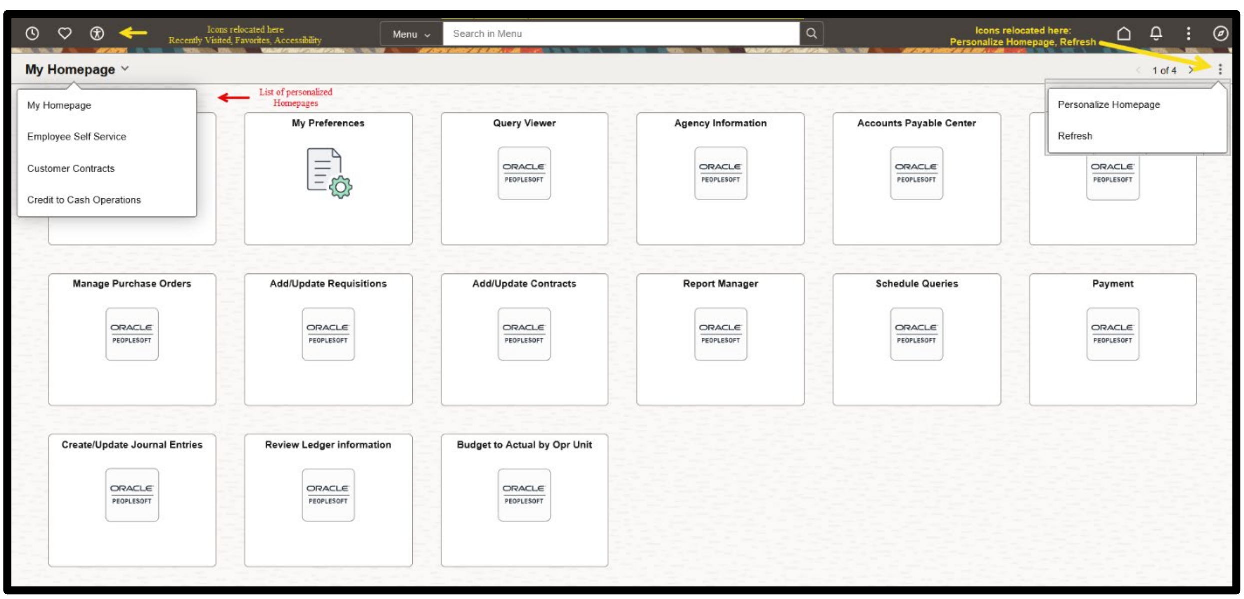
The new Fluid UI does not change how the user currently performs functions in the system. This mainly changes the look and feel of the screens and how you navigate the homepage and the Fluid styling of the interface.

Fluid navigation focuses on:

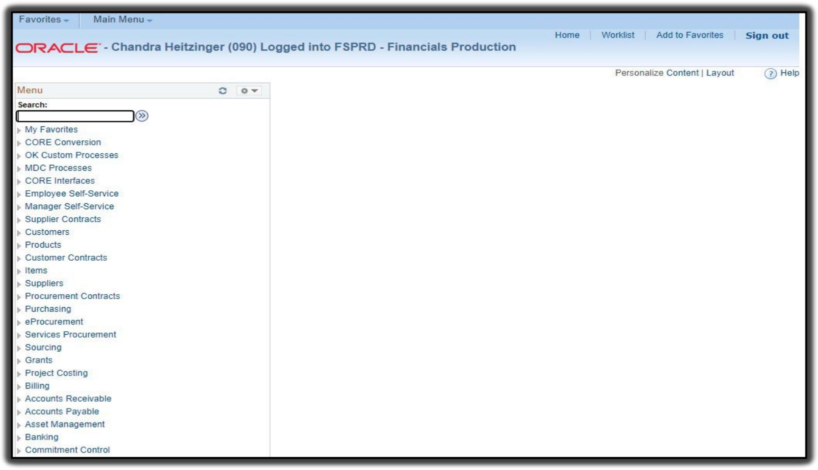
- Providing users with multiple paths to access functionality.
- Allowing users to choose the path that is most effective for them.
- Using related actions to make navigation work across all paths.

Homepage

Homepages are the starting point for navigation in Fluid when the user logs into PeopleSoft. A user can have several homepages but only one default homepage. The user can customize each homepage to accommodate their personal interaction with the system. PUM 51 moved the Personalize Homepage and Refresh icons from the banner to the Homepage section just below the original location.



Homepage showing new Fluid UI with custom navigation tiles and icon location updates.



Homepage in PeopleSoft 9.2 PUM5, prior to upgrade. (Classic Navigation)

Component

A component is a collection of related pages and controls that together represent a complete business transaction or function.

Tiles

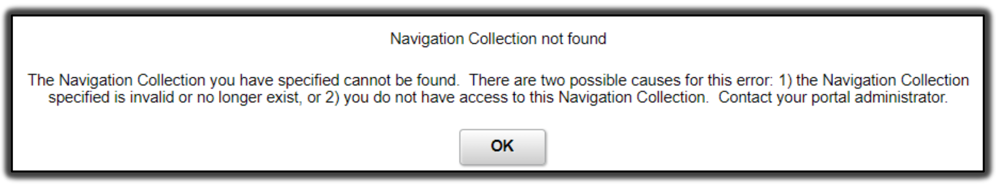
On the homepage there are several square icons titled with various component names. In the Fluid UI, these are referred to as tiles. They can more easily be defined as shortcuts to component pages or tasks. They are interactive and customizable.

Navigation tiles
These tiles (shortcuts) will take the user to a specific task. For example, creating a Regular Deposit.

Collection tiles
These tiles (shortcuts) will take the user to a grouping of tasks related to a specific component.

Important notes regarding collection tiles

Just because the user can see these tiles upon login does not mean they have security access to functions within these tiles. The user will receive this error message if they do not have access:



- These tiles can be deleted by following the steps under Remove navigation tile from homepage.

- The **left panel navigation**, available through the **collection tiles**, only provides access to standard delivered pages. None of our customized pages, functions, processes, or reports will be accessible via this navigation at this time.

  Therefore, we strongly urge users to utilize one of the following options to navigate the system:
  - **NavBar > Menu**.
  - Create custom **navigation tiles** that take the user directly to the functions they are not able to access through the collection tiles.
  - **Classic Menu**.

Navigating the Fluid homepage

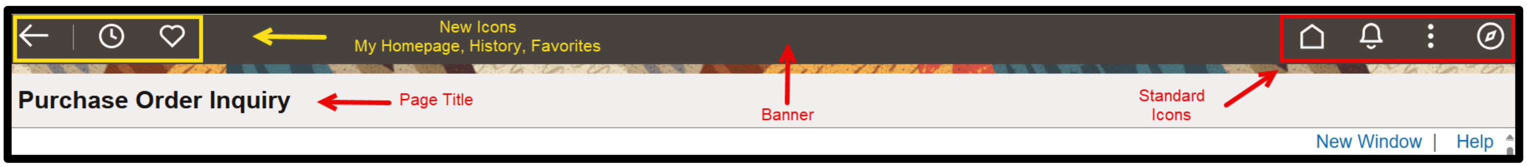
Breadcrumbs

At this time, the breadcrumb functionality **will not** be available after the upgrade. However, there are several new features and customizable options within the new Fluid UI.

View of breadcrumbs in PeopleSoft 9.2 PUM5.

Banner

The ribbon at the top of the screen is referred to as the banner, which contains the main elements a user will utilize to navigate the system.

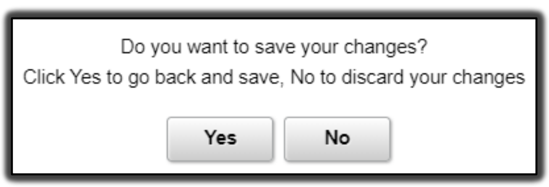


PUM51 Banner and Page Title

Back button

On every page in the Fluid UI, a **back button** should appear on the left side of the banner. The button allows users to return to the previous page. If the transaction is editable and edits have been made without saving, the **save** alert will display when the back button is selected.

Note: Do not use the back button on your browser, as you may not get a **save** alert and may cause issues with your data. Additionally, if you never receive the option to save your changes as you are exiting an edited screen, you may need to adjust your “save warning” settings under My Preferences > General Settings > System & Application Messages.



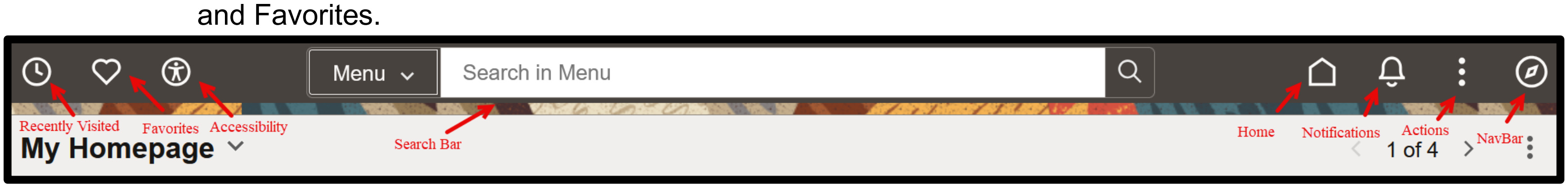
Save alert.

Page title

Refers to the current page the user is on.

Icons (banner actions)

There are four icons located in the right corner of the banner: Home, Notifications, Actions and NavBar. The left corner of the banner also has three icons: ← (My Homepage), Recently Visited and Favorites.



Banner icons

Home

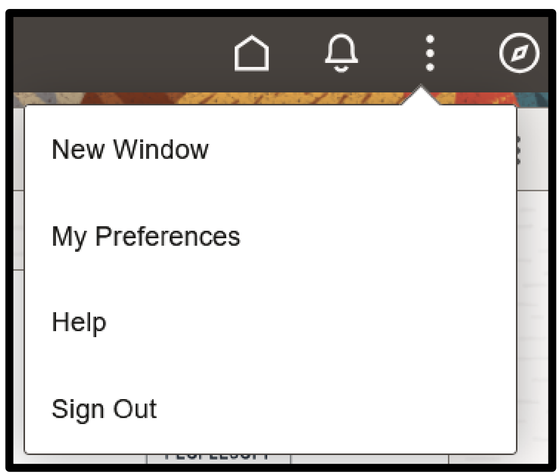
Takes the user back to the Fluid homepage, no matter where they are in the system.

Notifications
The **Notifications** icon will display a badge in the banner to notify the user of any new **actions** or **alerts**. These notifications include links that allow users to navigate directly to an item that needs attention. Currently, **Notifications** are configured for Requisitions and Voucher Approval Workflow.

Note: Notifications will be implemented shortly after go-live.

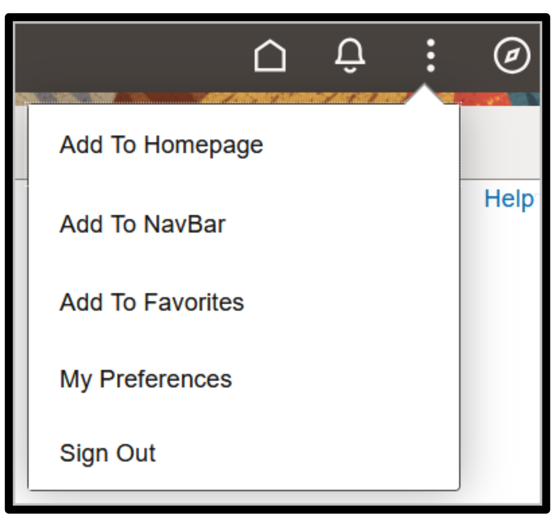
Actions List
These **actions** are different from the actions within the **Notifications** menu. This icon allows users to perform certain actions while on the **homepage** and different actions when on a page within the system.

- From the **homepage**, the user can perform the following actions:



Actions List from homepage.

- From any other page, the user can perform the following actions:



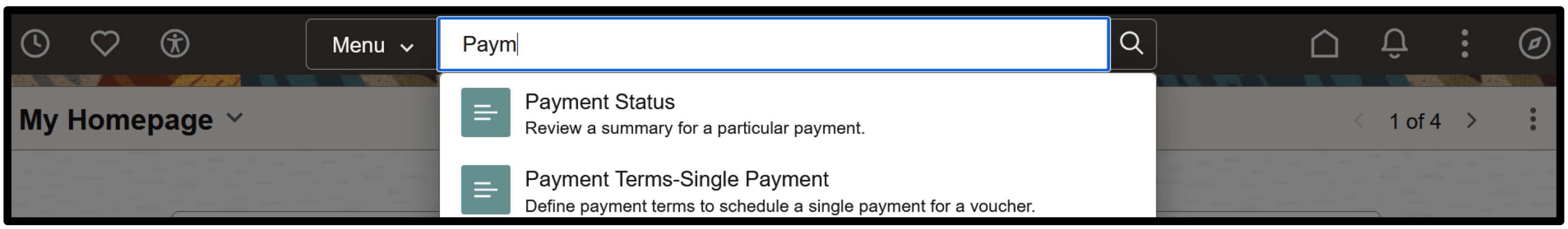
Actions List from a component page.

NavBar

The **NavBar** is the alternative to the Main Menu in PeopleSoft 9.2 PUM5.

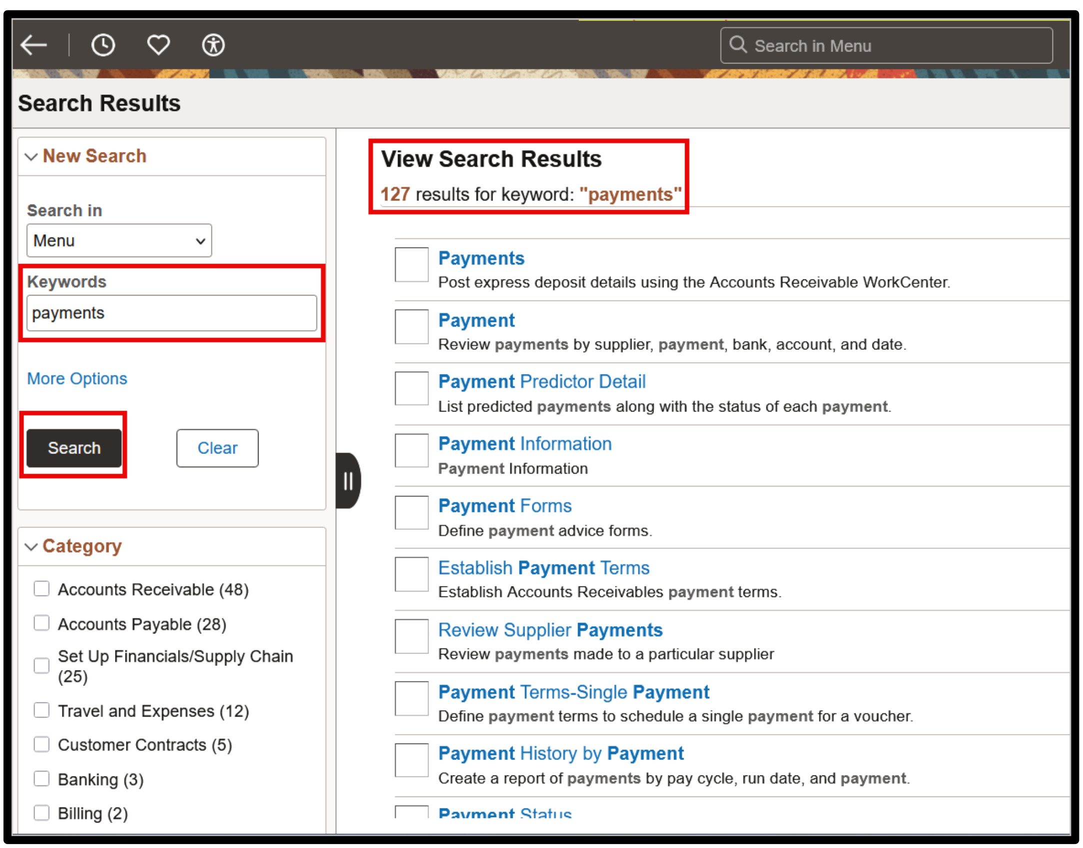
Global Search
PUM51 updates extend the search bar option, located at the top, into a Global Search – Long Description and improves search option availability on each page (recent searches and saved search options).

On the Homepage, users can use Global Search to search the entire system for keywords related to a function or task. The arrow next to the search box opens a dropdown menu, where users can select a specific Category/Module to search in or choose 'ALL' to search the entire system. When you click in the keyword input field, search suggestions are displayed immediately. As you type, the suggestions are updated to reflect the search term or terms you have entered. If you select an item from the results list, such as "Payment Status" in the example below, you will navigate to that specific screen. If you hit enter or select the spyglass icon, you will be navigated to the **View Search Results** screen.



Global Search

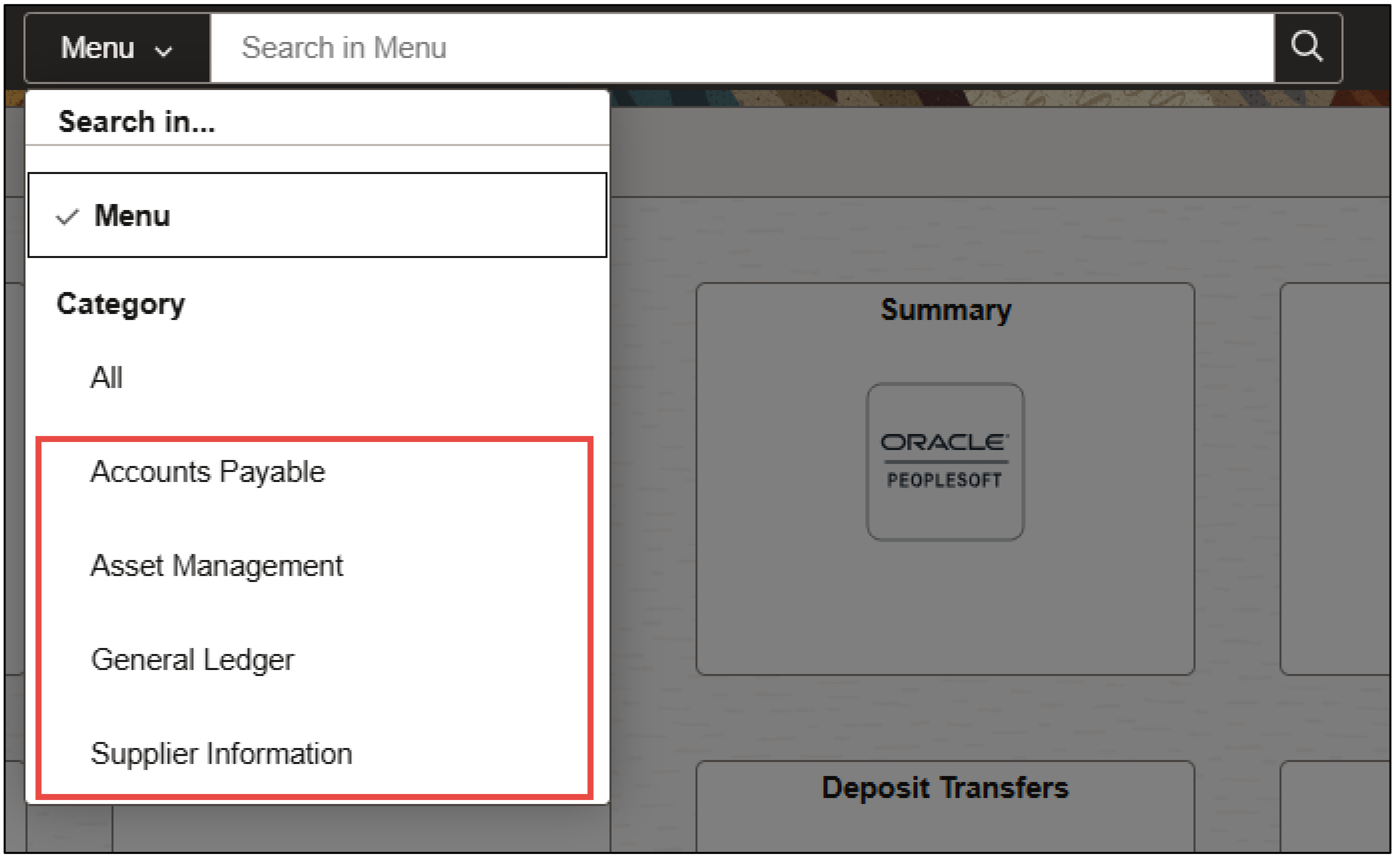
The system displays the search results in a two-panel window. If the user needs to modify the search, expand the arrow next to **New Search** and the search window will display without the user navigating back to the prior page.



Search Results page

Open Search

PUM 51 expands the Global Search menu, by introducing the Open Search feature. The Global Search bar provides a drop-down list for selecting a specific search category against which to run a search. Each category allows the user to execute a deeper, more free-form search to access the data. The example below shows a search in the “Accounts Payable” module for a specific supplier.

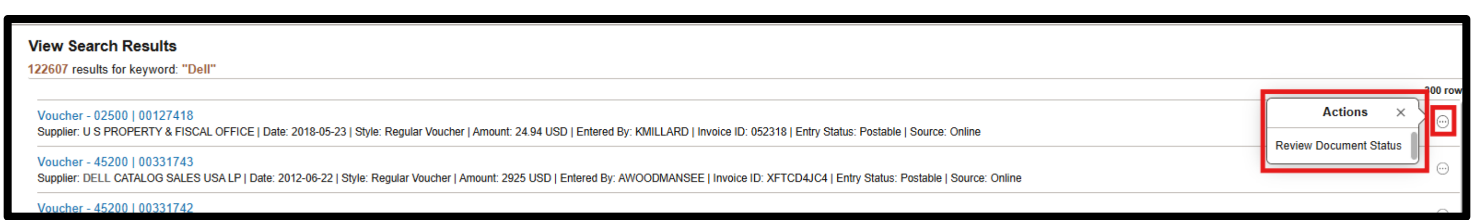


Category Open Search

Once your Open Search criteria is selected, click the magnifying glass to execute the search.

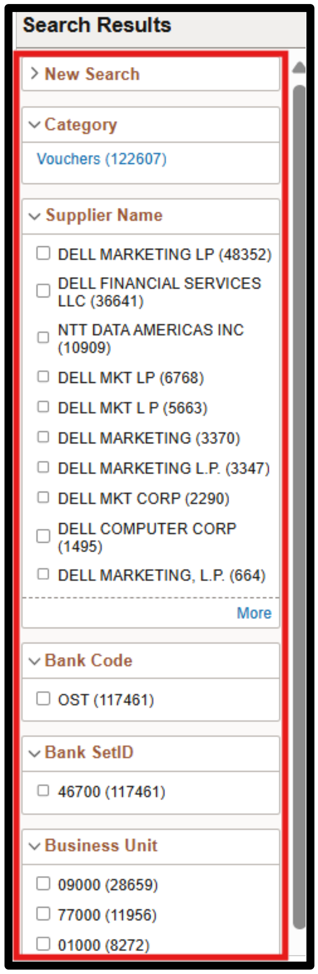
Accounts Payable Open Search

The Search Result will return any items that are related within that specified category. The hyperlinks will allow users to drill down into voucher details, as well as take action on the item.



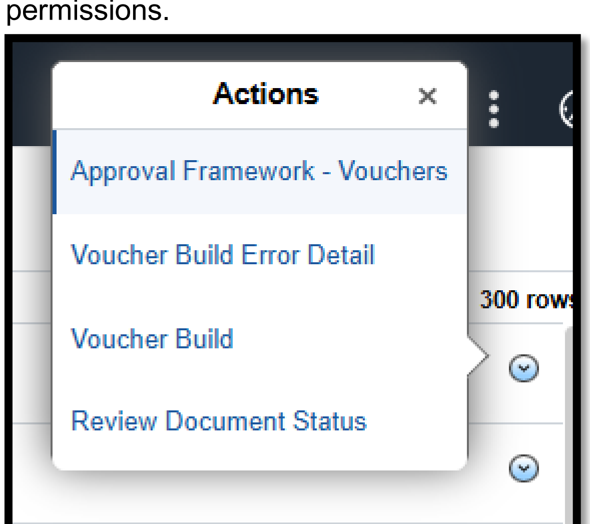
Search Results

To access a particular search result, click the hyperlink on that line. Users can also narrow down the search results by using the filters section on the left side of the page. For example, they can select a specific Supplier Name or Business Unit. Please note that the search results will only display items based on the user's security permissions



Search Result Criteria

Actions can be performed by selecting the Action button within the Search results. The actions that are shown will depend on the user's security permissions.



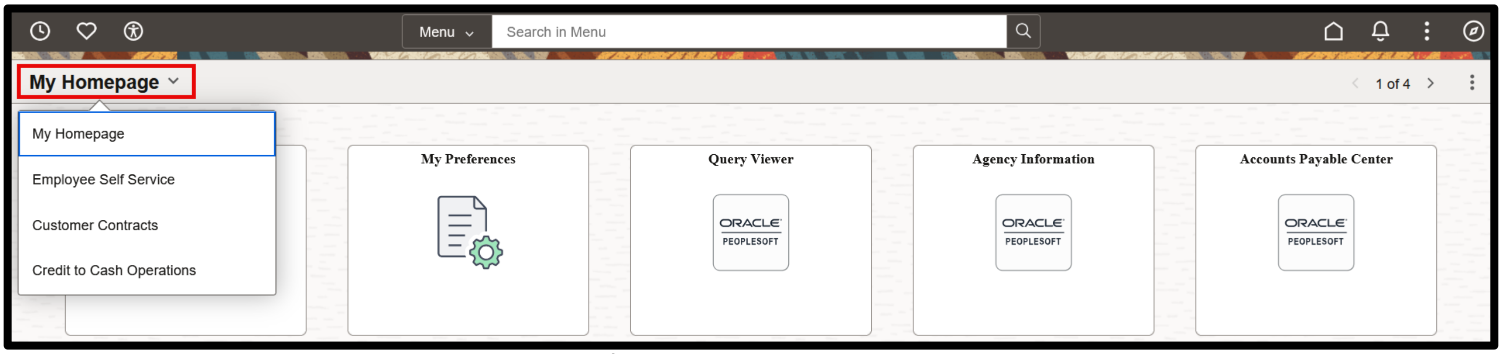
Actions button

Personalizing the homepage

Personalization options allow users to configure navigation based on their personal preferences and usage of the system. Users can personalize their user interface in multiple ways.

Create a homepage

When the user logs in, the default homepage is titled **My Homepage**. A user can create additional homepages to help them organize their tasks on separate pages. They would navigate between the different homepages by selecting **My Homepage** and then the desired page from the drop-down menu.



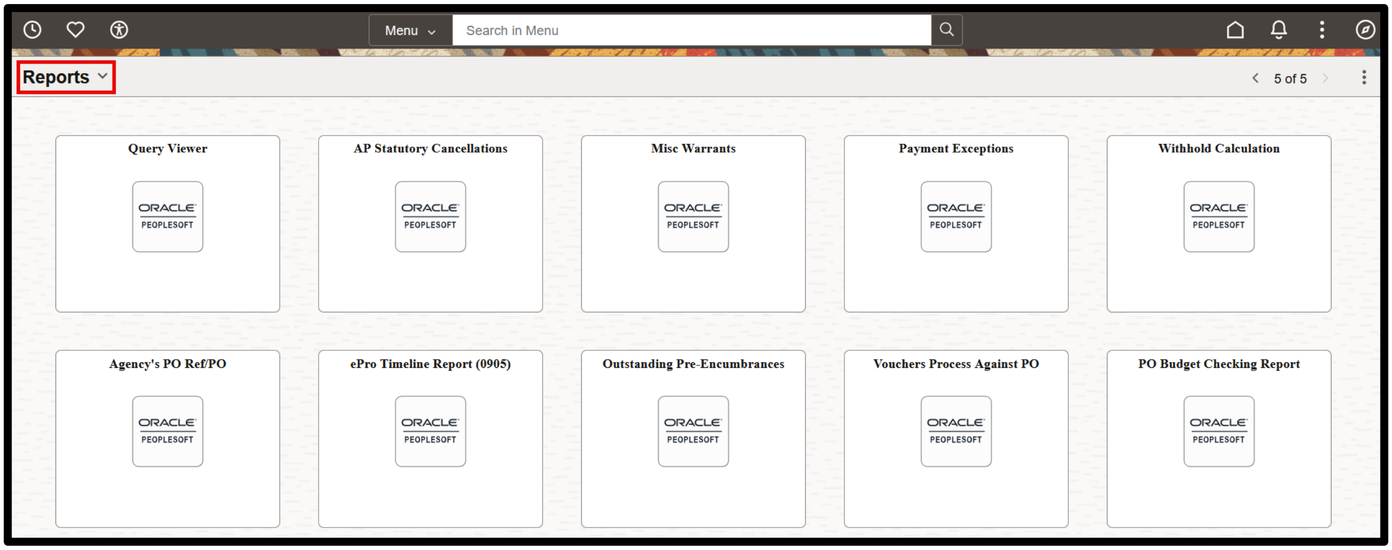
List of homepages created by user

For example, if a user performs most of their tasks in the Accounts Payable component and is responsible for running a variety of reports from different components, the user could have two homepages: 1) Accounts Payable and 2) Reports. They could then create tiles (shortcuts) for each task on the respective homepage for easier navigation through the system.

- Navigate to the current homepage by selecting the **Home** icon.
- Select the **Homepage Actions** icon.
- Select **Personalize Homepage** from the menu.
- Select the **Add Homepage** button from the upper left corner of the screen.
- In the **Create a New Homepage** field, enter the desired name of the new homepage. In this example, we are creating a **Reports** homepage.
- Select the **Add** button.
- Select the **Save** button in the upper right corner of the screen.
- The user will now see a new blank homepage titled **Reports.**

Add (new) Homepage setup screen.

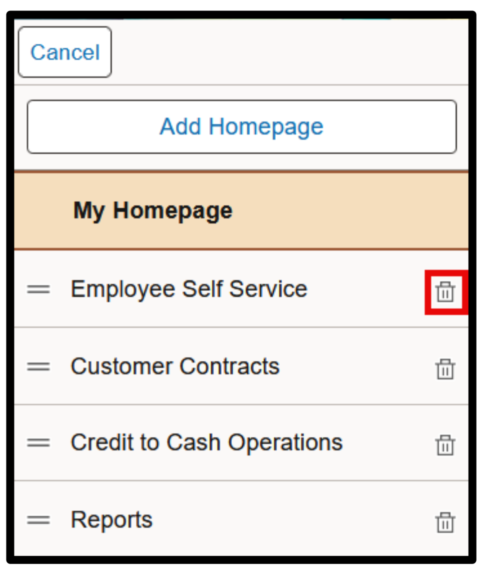
To add new tiles to the Reports homepage, users can follow the steps under Add navigation tile to homepage. In this example, we have navigated to several different reports in the system and added them to the new **Reports** homepage.



Example of a new Reports homepage, with eight new tiles (shortcuts) added.

Remove a homepage

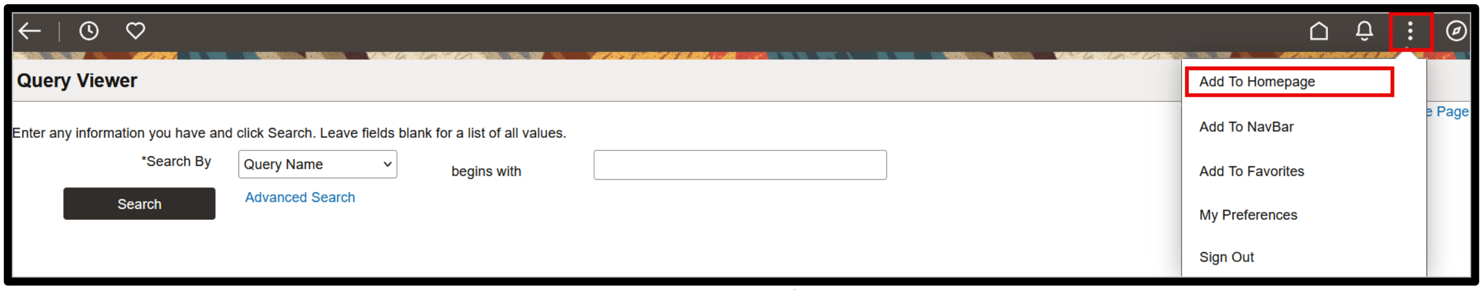
- Navigate to the current homepage by selecting the **Home** icon.
- Select the **Homepage Actions** icon.
- Select **Personalize Homepage** from the menu.
- Select **My Homepage** in the left menu. A **Trash bin** icon should appear next to the rest of the homepages.
- Select the Trash bin icon next to the homepage you want to delete.
- Select the **Save** button.
- User should no longer see the homepage in the list.



Menu to remove a homepage.

Add navigation tile to a homepage

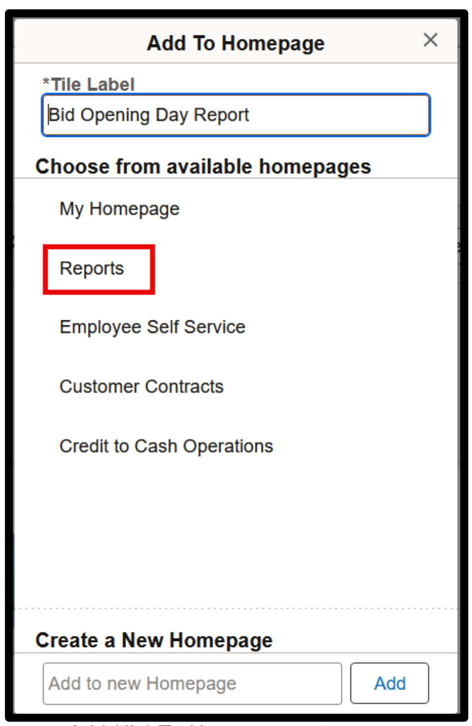
- In this example, we add the Query Viewer navigation tile.
- Navigate to: NavBar > Menu > Reporting Tools > Query > Query Viewer.
- Select the **Actions** icon.
- Select **Add To Homepage**.



Add a tile to a homepage from a page.

- In the **Tile Label** field, enter the name to be displayed under the tile.
- Under **Choose from available homepages**, select the homepage on which the tile should appear.

Note: If the tile has already been added to the Homepage you will see a notice that says the title of the Homepage (already added).



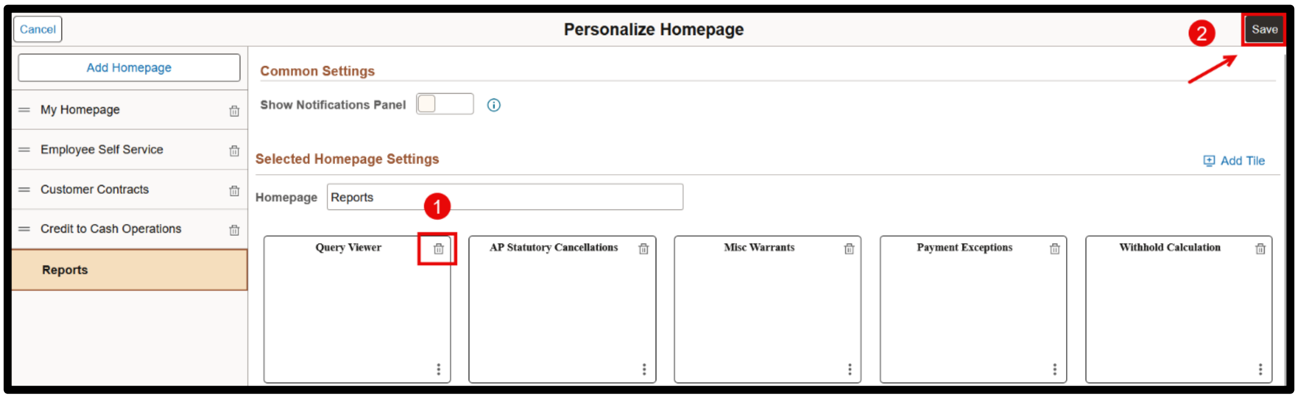
Add (tile) To Homepage setup screen.

- A confirmation message will display. Select **OK**.
- Select the **Home** icon to return to the homepage.
- A navigation tile for **Query Viewer** should now be displayed on the **Reports** homepage.

Remove navigation tile from a homepage

To remove a navigation or collection tile from a homepage, perform the steps below. In this example, we remove the Query Viewer navigation tile.

- Navigate to the homepage by selecting the **Home** icon.
- Select the **Homepage Actions** icon from the upper right corner of the screen.
- Select **Personalize Homepage**.
- Find the tile to be removed and select the **trash icon** in the upper right corner of the tile.
- Select the **Save** button in the upper right corner of the screen to save changes to the homepage.

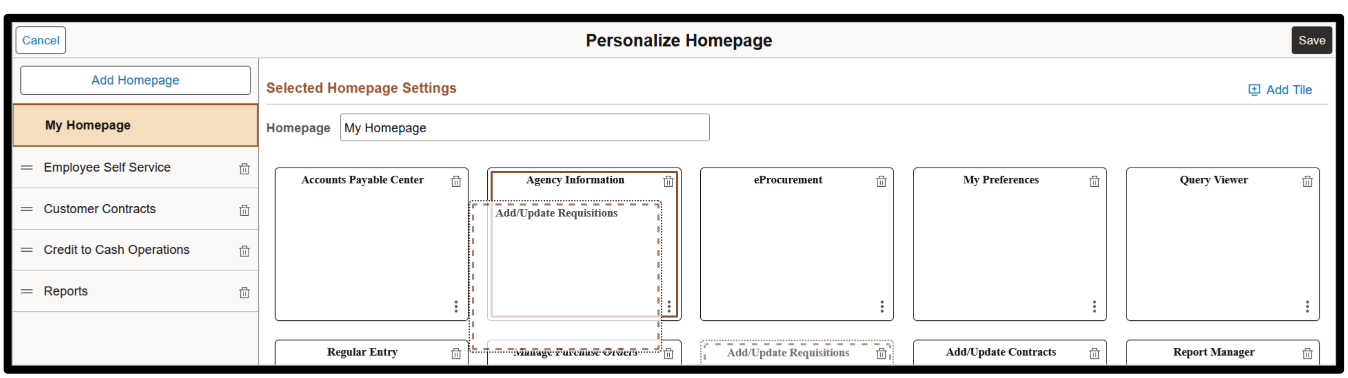


Menu to remove tile from homepage.

Arrange tiles on a homepage

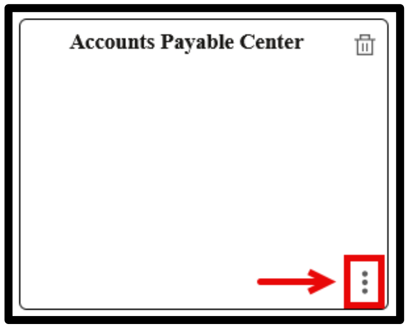
If the user wants to rearrange tiles on the homepage, perform the steps below.

- Navigate to the homepage by selecting the **Home** icon.
- Select the **Homepage Actions** icon from the upper right corner of the screen.
- Select **Personalize Homepage**.
- Locate the tile to be moved on the appropriate Homepage
- You can **alter the sequence** in which the tiles appear on the homepage using drag and drop. Click and hold the tile icon and drag it to the desired position, then release. The dotted brown line indicates the tile you are dragging, and the solid brown line indicates the location where you are dropping the tile.



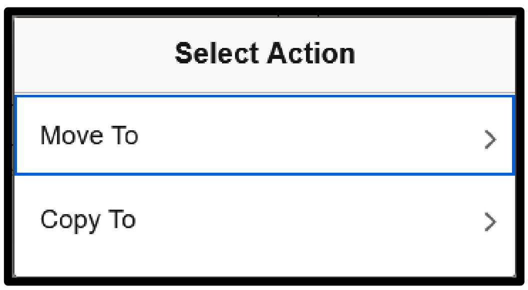
Move a tile from one homepage to another

- Navigate to the homepage by selecting the **Home** icon.
- Select the **Homepage Actions** icon from the upper right corner of the screen.
- Select **Personalize Homepage**.
- Locate the tile to be moved or copied.
- Select the **three dots** at the bottom right corner of the tile.



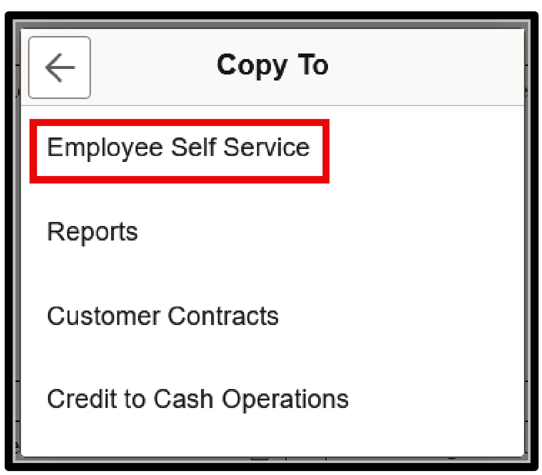
***Move To** or **Copy To** action button on tile.*

- Select either **Move To** or **Copy To**.



***Move To** or **Copy To** selection menu.*

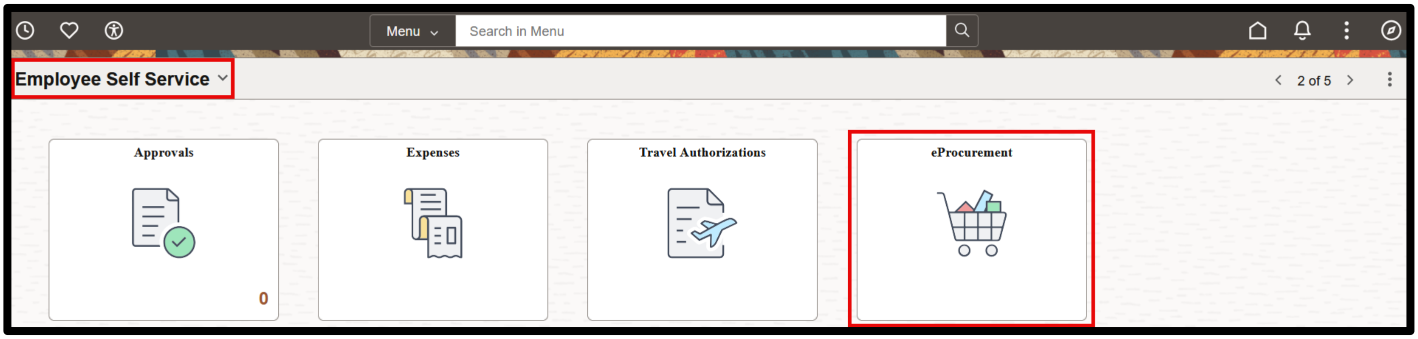
- Select the homepage to which the tile is being moved/copied.



Selecting homepage tile to Copy To.

- Select the **Save** button.

Select the homepage from where the tile was moved or copied in the banner drop-down menu to verify.



Select the homepage section from the banner to navigate to a different homepage.

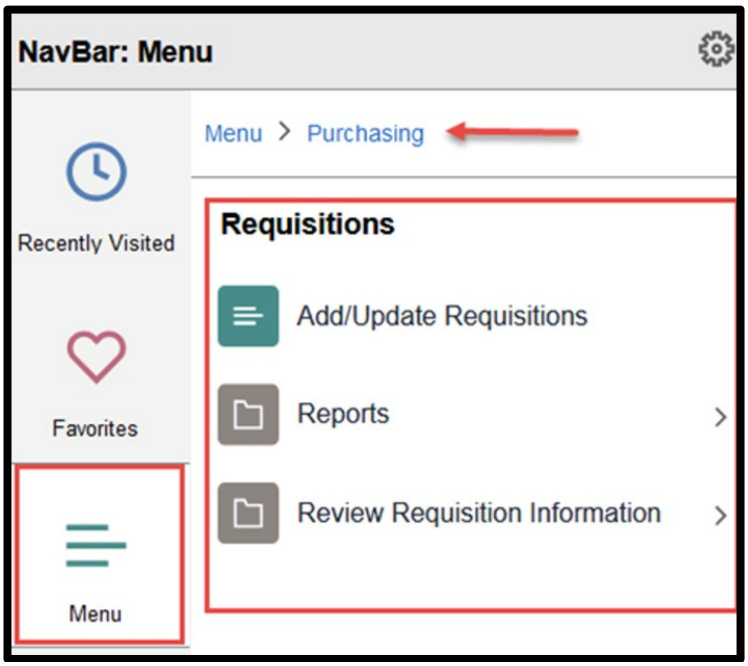
Navigating the NavBar

NavBar

The **NavBar** menu provides access to all components the user is authorized to access based on their security permissions. This mirrors the **Main Menu** functionality within the Classic Menu; however, it does not display the cascading menus like the Classic Menu does. If the user prefers the Classic Menu, they can follow the steps under Classic Home.

As **Menu** items are selected, they move to the top of the **NavBar** list (as seen in the image below). Select the blue hyperlink to return to the previous menu path.

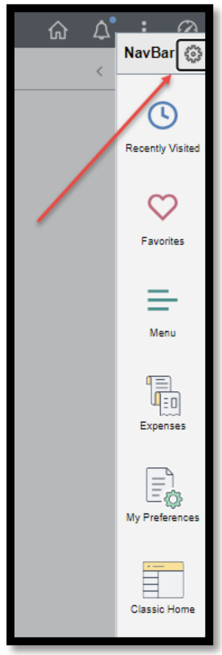
The **NavBar** may be personalized to fit user preferences.



Navbar Menu

Personalize NavBar (gear icon)

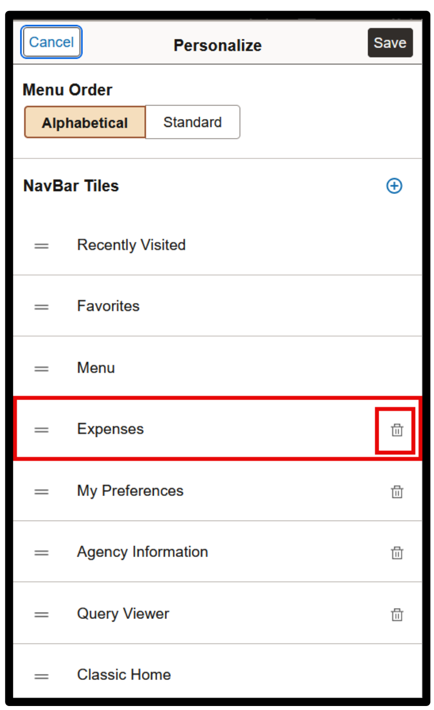
This icon provides limited customization as to what menu items are displayed on the NavBar. Users can add, remove and reorder items like they can on the homepage.



Personalize NavBar from the gear tile.

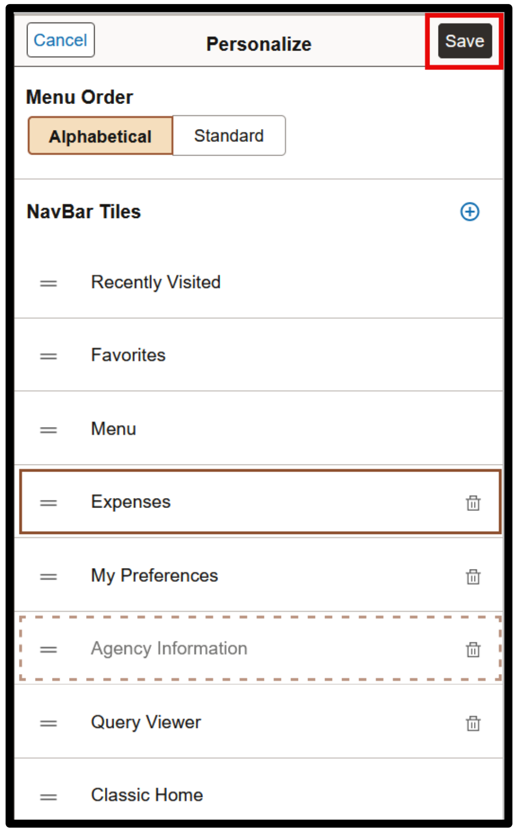
Remove a menu item from the NavBar

- Navigate to the homepage by selecting the **Home** icon.
- Select the **NavBar** icon from the upper right corner of the screen.
- Select **Personalize NavBar** icon.
- Select the **Trash bin** icon next to the tile to be removed.
- Select **Save**.



Removing a tile from the NavBar.

You can **alter the sequence** in which the items appear in the pane using drag and drop. Select, hold and drag the tile icon to the desired position, then release. The dotted brown line indicates the item you are dragging, and the solid brown line indicates the location where you are dropping the item. You can update your **Menu Order** from **Alphabetical** or **Standard** within the Personalize NavBar menu.

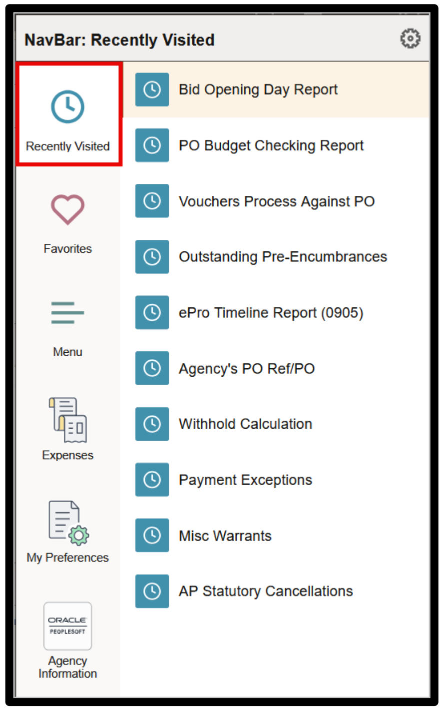


Select and drag tile to alter the sequence tiles are displayed in the NavBar.

Note: While adding items to the NavBar is available, users are encouraged to use the **My Favorites** option or add a **navigation tile** to their **homepage**, rather than adding items to the NavBar.

Recently Visited

This Menu item stores a list of the ten most recent pages the user has viewed in the system. Users can select any of their **Recently Visited screens** to navigate to them.

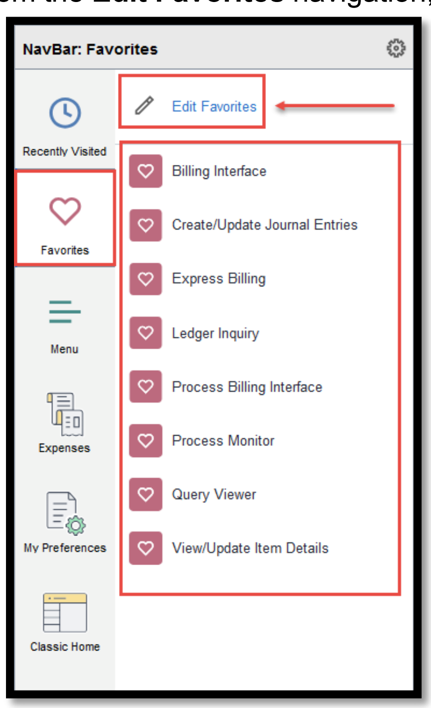


Recently Visited menu

My Favorites

This Menu item stores a list of pages the user marked as **My Favorites**. This functionality operates like the previous version of PeopleSoft and will contain any previously saved favorites. The pages displayed in this list are customizable and can be edited by the user.

Note: Favorites cannot be **added** from the **Edit Favorites** navigation; you can only edit and view them.



My Favorites menu.

To **add** a page in the **My Favorites** menu:

- Navigate to the task being performed. In this example, we navigate to Query Viewer.
  - NavBar > Menu > Reporting Tools > Query > Query Viewer.
- Select the **Actions** icon.
- Select **Add to Favorites**.
- Enter the name to be displayed in the My Favorites menu.
- Select **Add**, then select **OK**.

Add to Favorites setup screen.

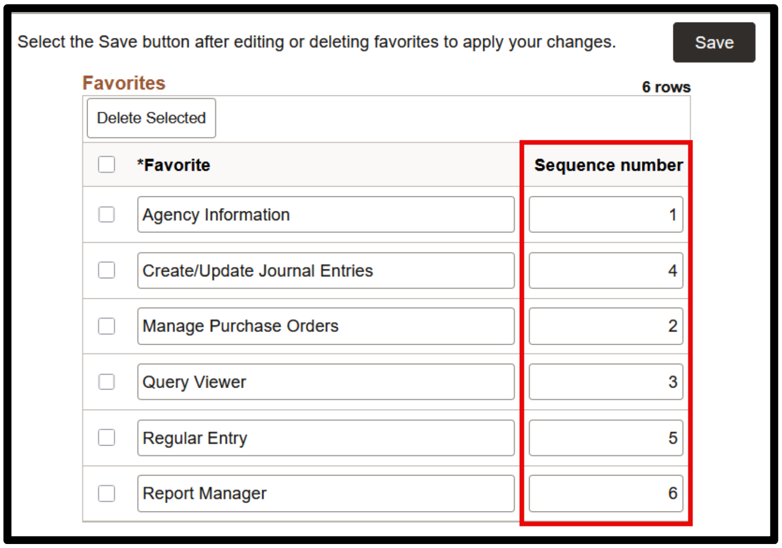
To **delete** a page in the **My Favorites** menu:

- Select the **NavBar** icon.
- Select **Favorites.**
- Select **Edit Favorites**.
- Select the box(es) next to each component to be deleted.
- Select the **Delete Selected** button at the top of the menu.
- Select **Yes** on the confirmation message displayed on the screen.
- Select the **Save** button.

Edit Favorites menu.

To **rearrange** the order in which the pages are displayed in the **My Favorites** menu:

- Select the **NavBar** icon.
- Select **Favorites.**
- Select **Edit Favorites**.
- Enter sequential numbers in the fields under the **Sequence number** column, in the order the user wants them to display.
- Select the **Save** button.



Edit Favorites menu.

Expenses

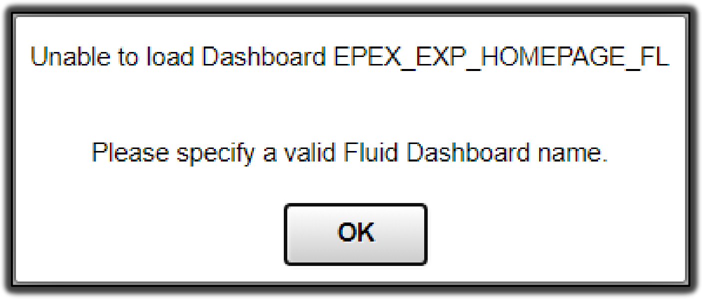
This Menu item will **not** work for every user. If you receive error messages, this is not a bug. It just means your agency is not using this feature at this time, or the user doesn't have security access to this module.

If the **Expenses** icon is not functioning properly and is displaying the messages below, follow the steps to Remove a tile from the NavBar.

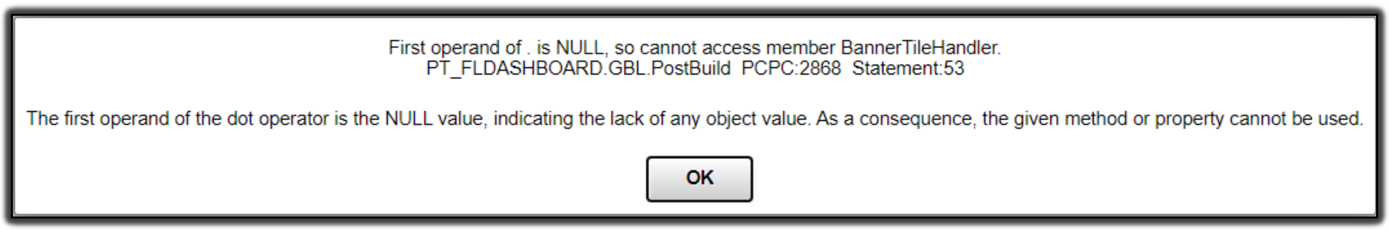
Note: Please do not contact the OMES Service Desk for issues related to these messages.

When selecting the item, several error messages are displayed.

- Select **OK** on the first two messages displayed.

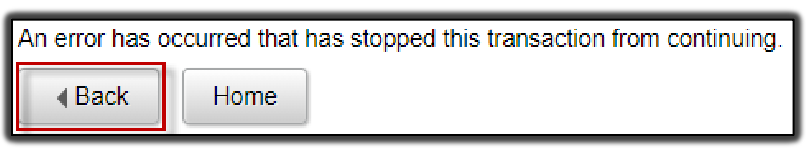


Error message 1.



Error message 2.

- Select **Back** on the last message

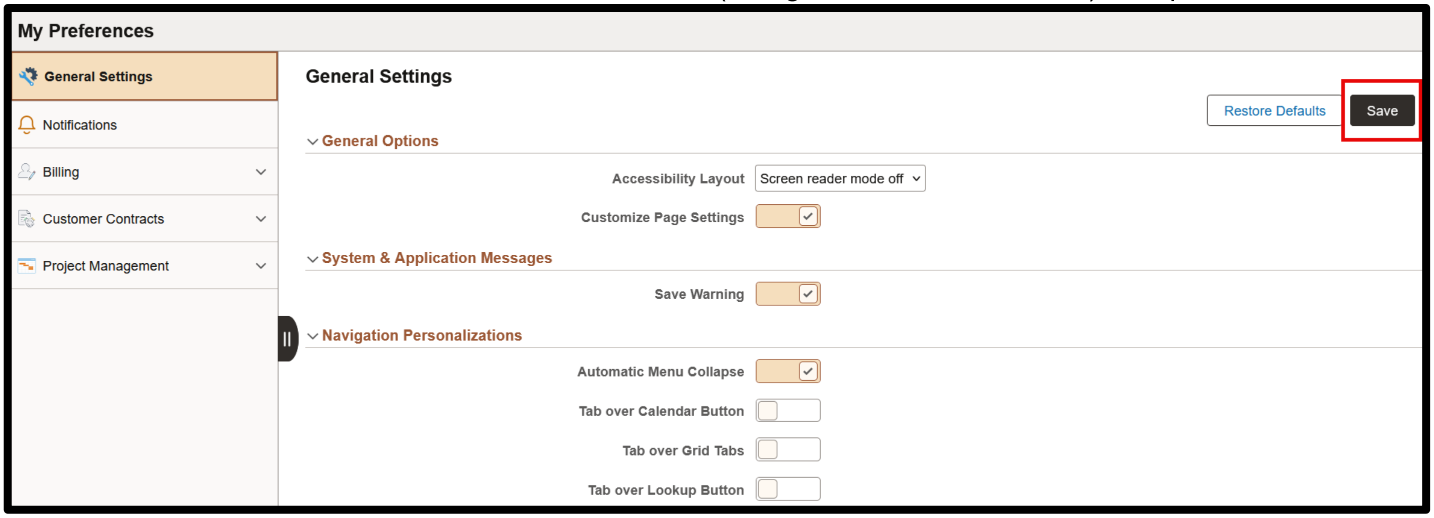


Error message 3.

My Preferences

This Menu item contains customizable settings the user can turn on/off based on their preferences and interactions with the system (e.g., Autocomplete, Tab over Calendar button, Tab over Lookup button, Tab over Page Links, etc.). The selections made here will apply to all pages to which the user has access within the system.

- Select the arrow next to the **Section Headers** (Navigation Personalizations) to expand the menu.



Customizing My Preferences.

- Review the list of options and make changes by selecting the **On/Off** slider switch buttons.
- After all changes have been made, select the **Save** button in the upper right corner.

Classic Home

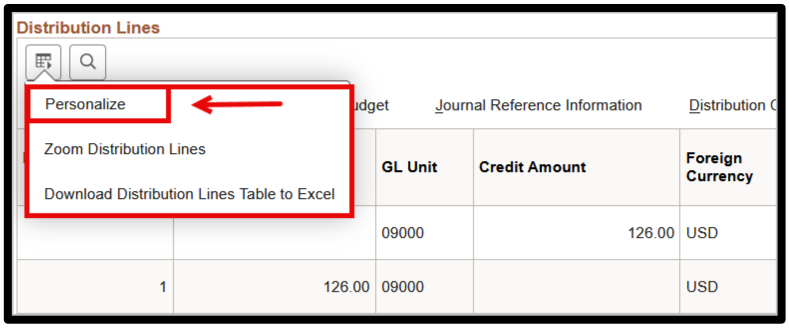
This Menu item navigates to the **Classic Menu** view, like the previous versions of PeopleSoft Financials. When you navigate to this page for the first time, the Classic Menu may be minimized on the screen. If this is the case, select the **gear** button with the down arrow on the bar that displays the words "Menu – Classic." Then select **Expand**.

Expand the Classic Menu.

Personalizing data grids

Personalizing data grids in various screens is slightly different after the upgrade. Accounting entry data grids are a great example, as these data grids are used in various components throughout PeopleSoft.

Note: The user only needs to personalize the screen one time, and it will maintain that layout going forward, until the user needs to modify.



Hide fields

The user can **hide** accounting chart fields their agency does not utilize, allowing the user to only view fields applicable to their business needs. The examples are shown in red **boxes/arrows** in the diagram below.

- Select a **field** in the **Column Order** to be hidden.
  - Several field selections can be made at the same time by using the **Shift** button on the keyboard (to select multiple fields in a row) and/or the **Ctrl** button on the keyboard.
- Select the **Hidden** check box.
- Once all changes are made, select the **OK** button at the bottom of the screen.
- The changes that were made should now be reflected on the data grid.

Reorder fields

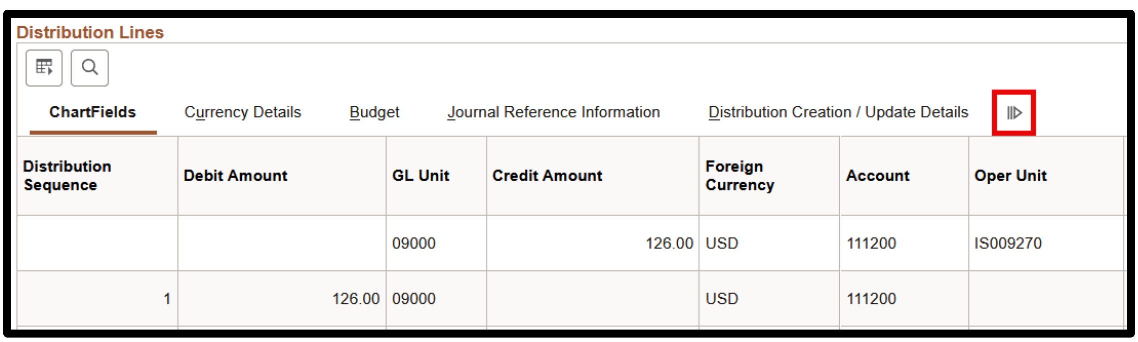
The user can **reorder** how fields are displayed in a data grid by arranging them in a way that better suits their business needs. The examples are shown in green **ovals/arrows** in the diagram below.

- Select a **field** in the **Column Order** to be moved.
- Select the **up** or **down arrows** to move the field within the list.
- Once all changes are made, select the **OK** button at the bottom of the screen.
- The changes that were made should now be reflected on the data grid.

How to hide or reorder fields in a data grid.

Show All Columns icon

When the user selects the Show All Columns icon, it expands all the tabs within the page. In previous versions this icon was referred to as **The Blue Bus.** This has been replaced with a **right arrow** to signify expanding to show all columns.



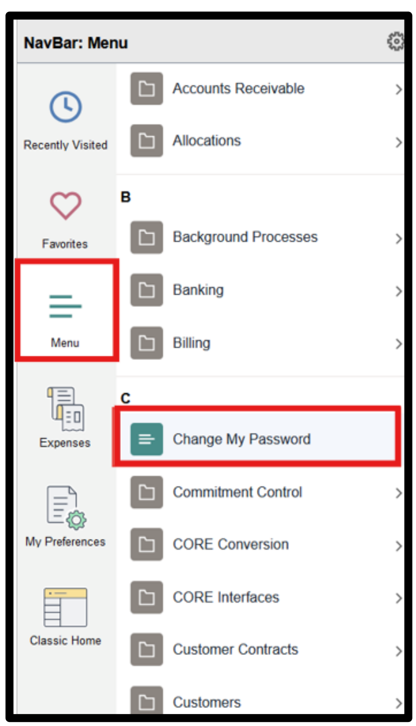
Example of current PeopleSoft chart field screen navigation.

Change your password

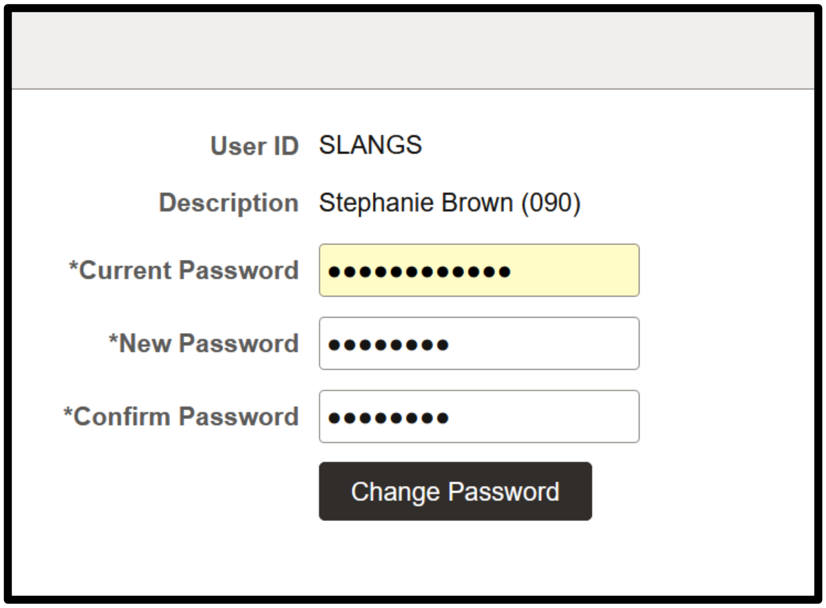
- Log in to PeopleSoft at PeopleSoft Financials.
- Enter your **User ID** and **Password**.
- Select **Sign In**.

- Select the NavBar icon in the upper right corner of the homepage.

- Select **Menu**. This action displays a list of menu items.
- Scroll down the list to find the **Change My Password option**.



- Enter the **Current Password**.
- Enter the **New Password**.
- Confirm **New Password**.
- Select **Change Password**.



- If the criteria above are entered successfully, the user should receive a confirmation message.
- If the criteria above are not met or entered successfully, the user will receive a message to modify the information entered.

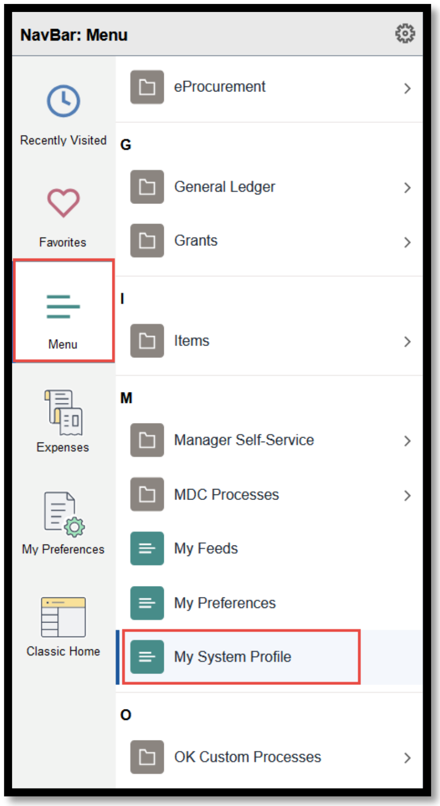
Forgot your password – How to set up

- In order to use the **Forgot your password** feature, the user must configure a few settings before it will work.
- Log in to PeopleSoft at PeopleSoft Financials.
- Enter your current **User ID** and **Password**.
- Select **Sign In**.

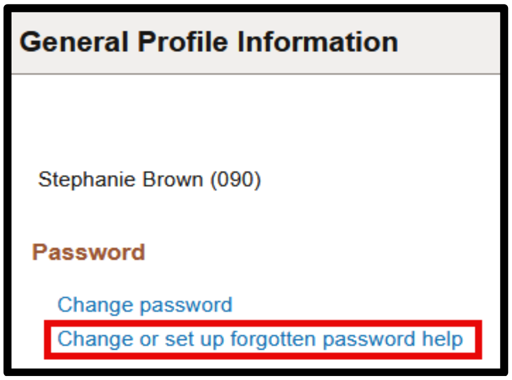
- Select the **NavBar** icon in the upper right corner of the homepage.

- Select **Menu**. This action displays a list of menu items.

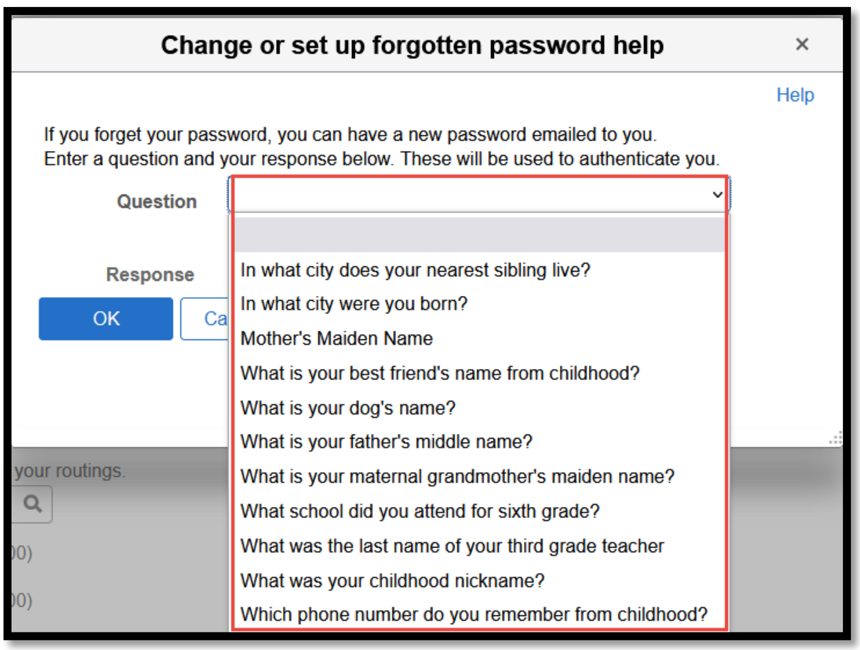
- Scroll down the list and select **My System Profile**.

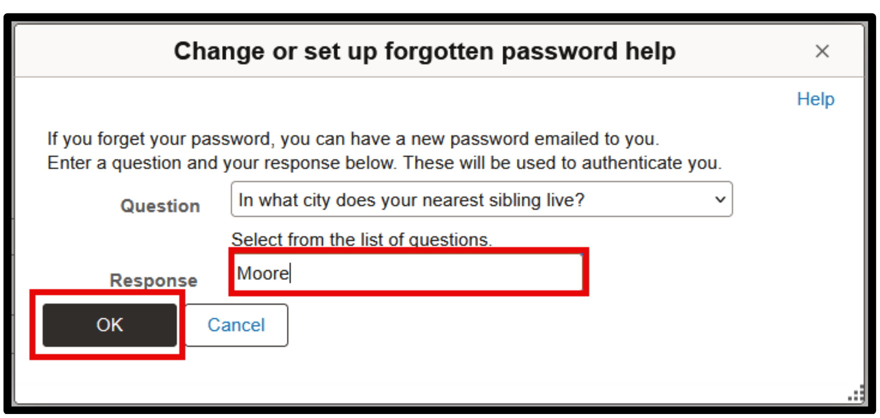


- Select **Change or set up forgotten password help.**



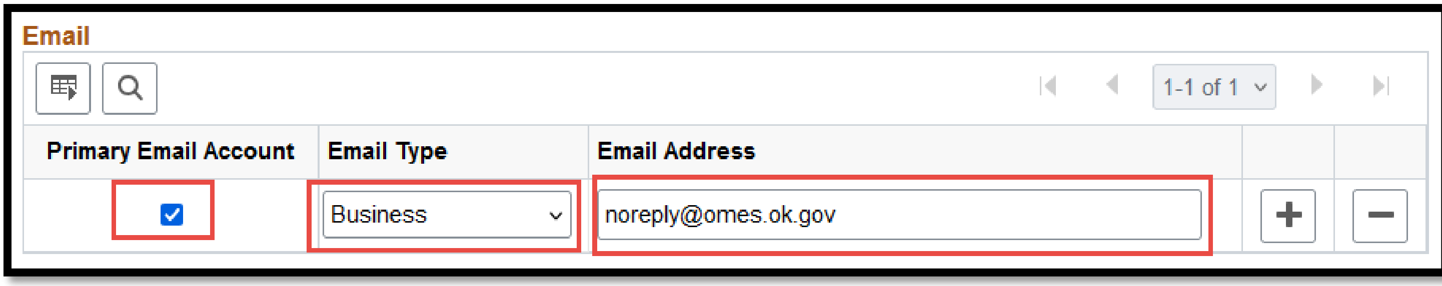
- Select a security question from the dropdown list.
- Enter answer in the response field.
- Select **OK**.





- Scroll down the page until you see the **Email** section.
- Make sure the box is checked under **Primary Email Account**.
- Select Business for **Email Type**.
- Enter the users **Email** address.
- Select **Save**.

Note: This email must be populated accordingly to receive notifications for **Requisitions and Voucher Approvals**.

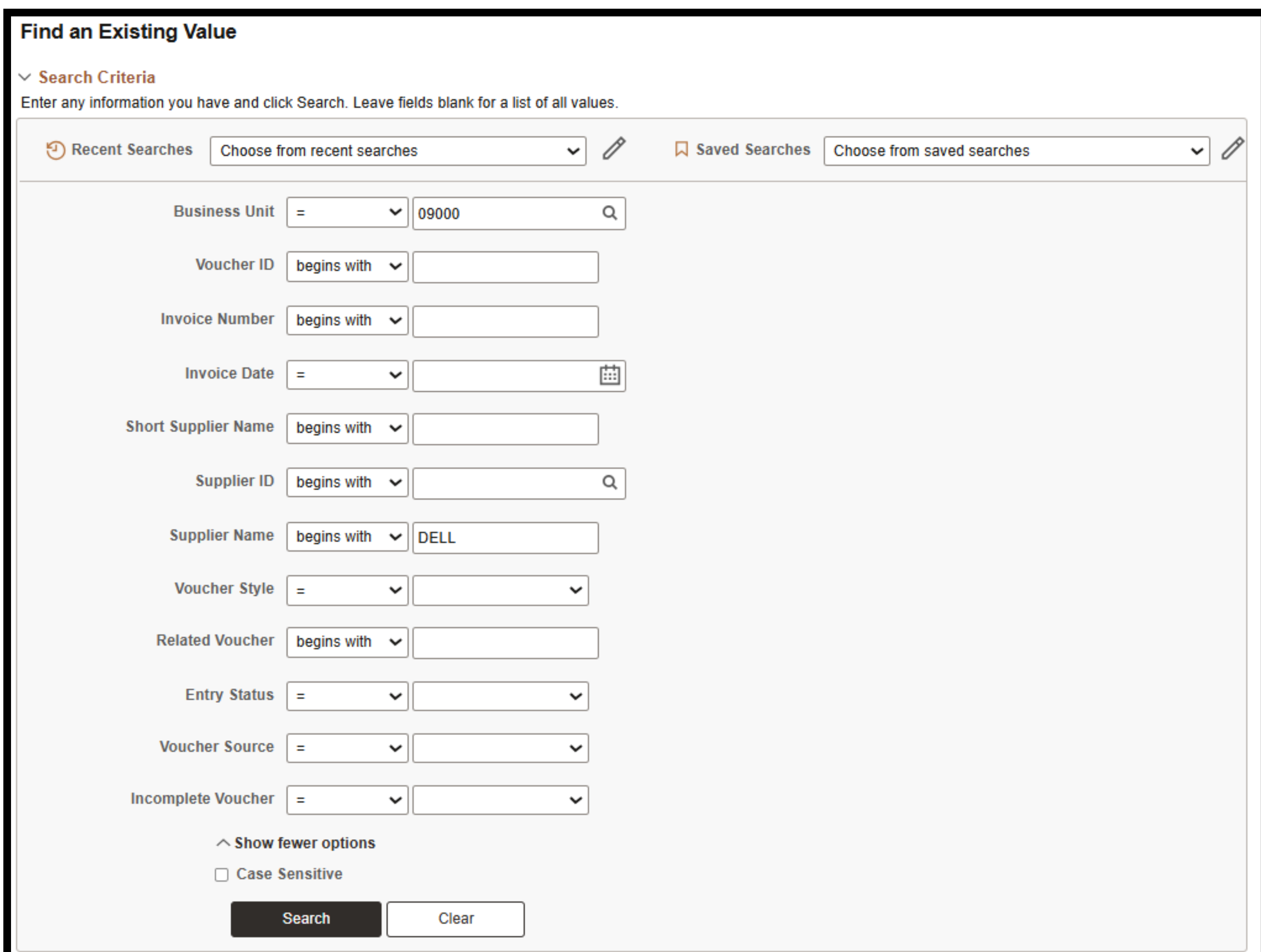


Save Search Pages

PUM 51 updates change the way the user interfaces with PeopleSoft Search pages. When opening some search pages, the user will now be able to search by "Keywords." To use the Keyword Search page, add any keywords upon which you want to run your search, and click Search.

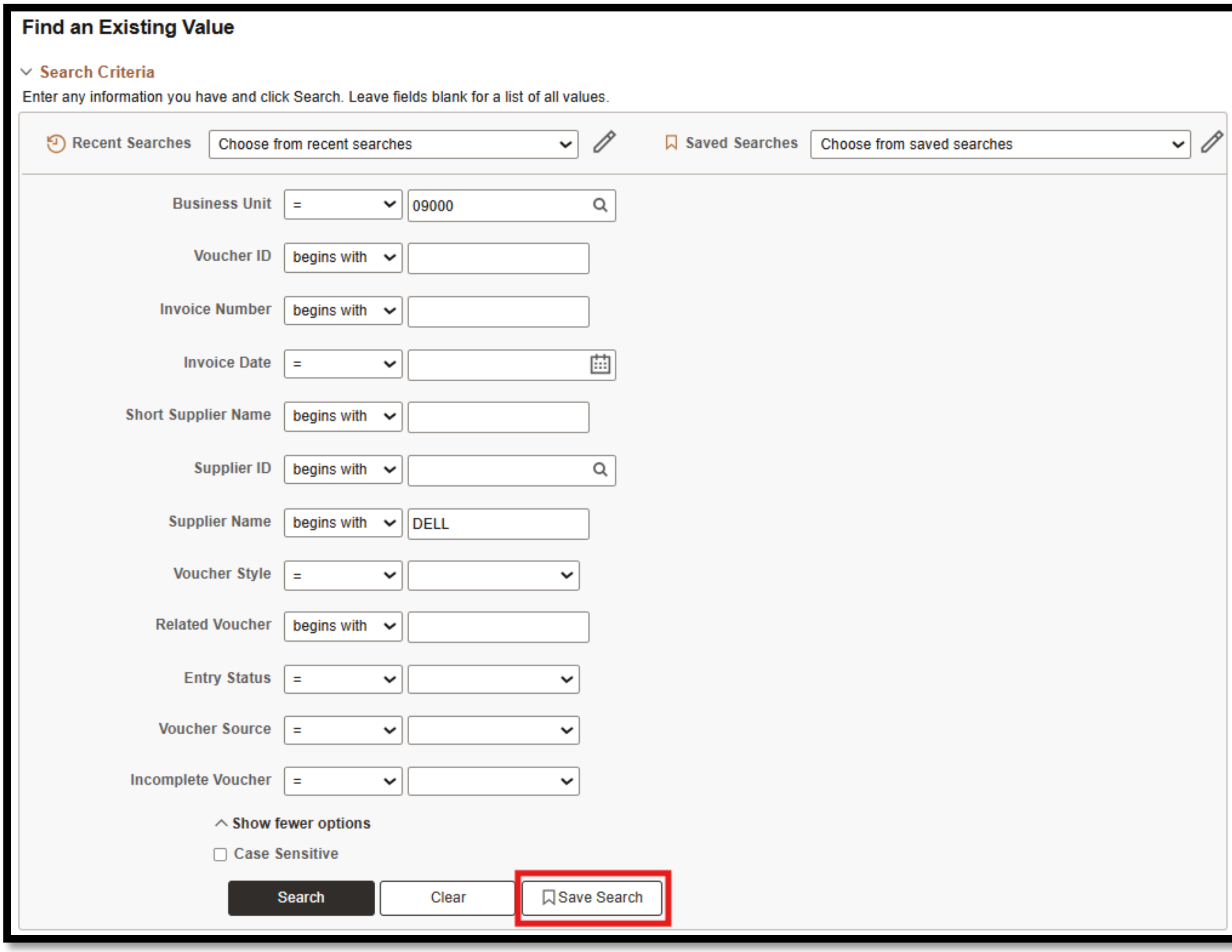
Keyword Search

To display additional prompts for predefined search criteria, select **Show more options**. The user can then input their desired search criteria and select Search to display results

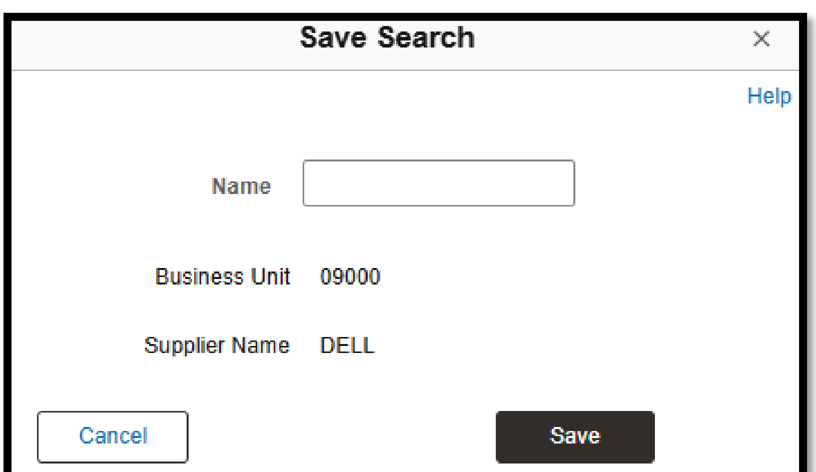


Advanced Search

After you click Search, you will have the option to "Save Search". Select the Save Search button to save the search criteria entered.

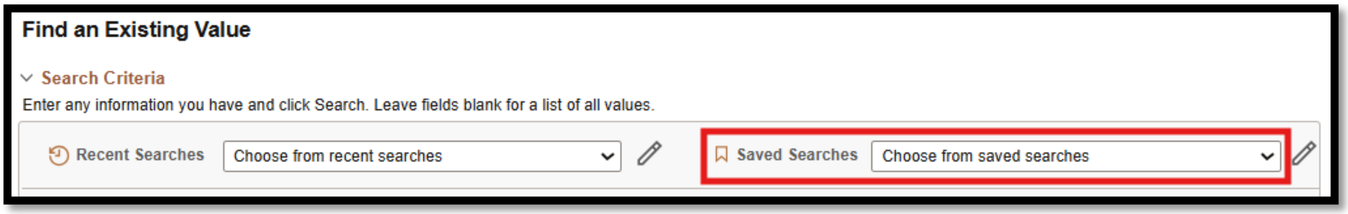


Enter a Name for your saved search, then click the Save button.

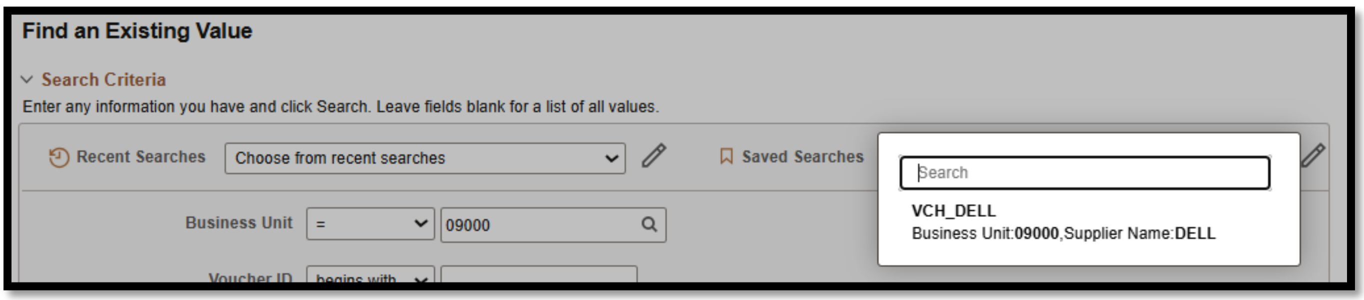


Save Search Screen

After saving the Search, the user will be able to access it using the “Saved Searches” dropdown and selecting the appropriate Search name. The user can edit their Saved Searches using the “pencil icon” next the dropdown.



The user can search for their Saved Search by name or directly select it from the results list.



The user can also access their Recent Searches, and reuse the criteria inputted from those searches. Select the Recent Searches dropdown to view the user’s recent search criteria, then select the search criteria you wish to reuse.