

PeopleTools 8.56

Quick Start Guide

Version 1.0
July 2018



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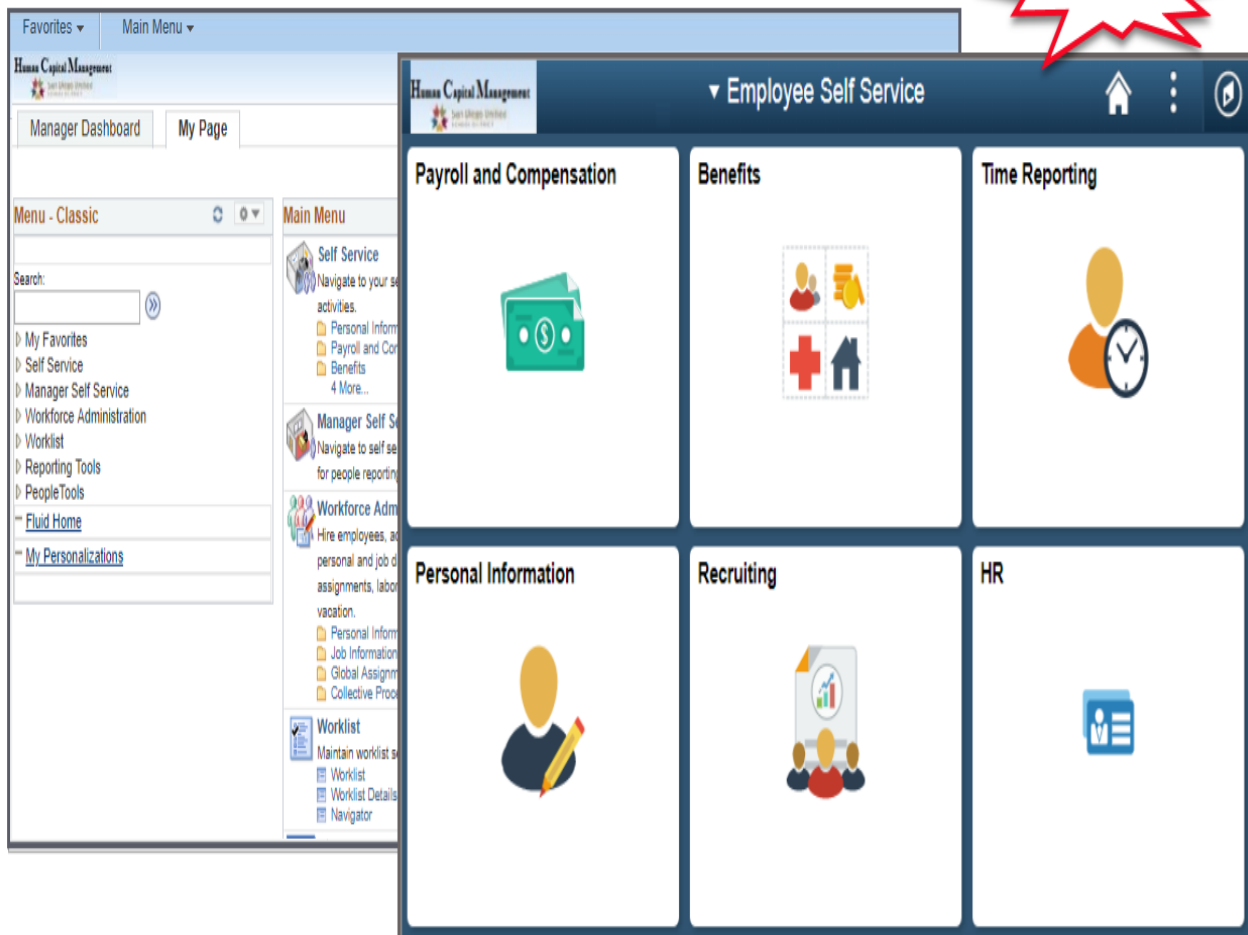
New Look

PeopleSoft PeopleTools 8.56 offers a new way of visualizing information using the Fluid User Interface. Fluid Interface is designed to adapt easily to various devices, including mobile phones and tablets. Fluid navigation uses Homepages and Tiles as the starting point for navigation. This new navigation creates more functional, personal, and effective navigation pathways for users within PeopleSoft applications across multiple devices.

The impact to users is minimal. **Processes and procedures will remain the same.** The most noticeable difference is a more user friendly navigation using tiles instead of lines of text and breadcrumb menu used on the classic interface.

The picture below is an example of the look and feel of the current (classic) look versus the new fluid PeopleSoft page:

CURRENT LOOK


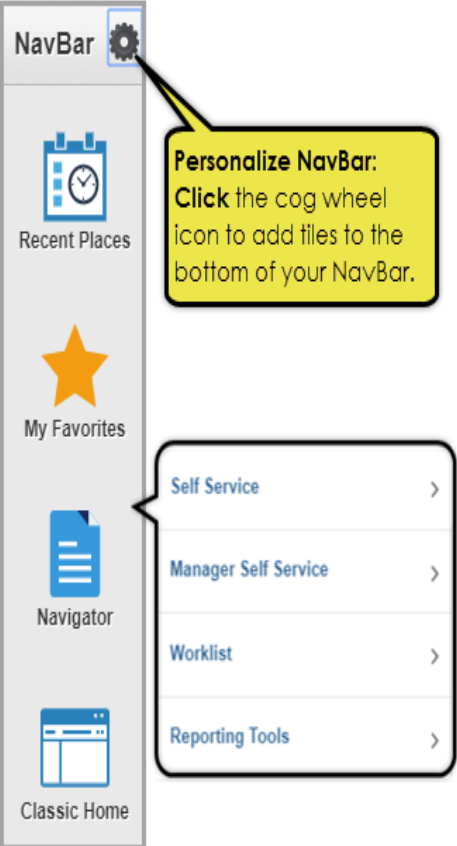




New Features

Although PeopleTools 8.56 is a major upgrade to the technical underpinnings of PeopleSoft, much of what is new with the user interface will be quite apparent. The table below list the new interface features and descriptions.

Feature	Description
<p style="color: red; font-weight: bold; font-size: 1.2em;">Homepage</p>	<p>A launch pad that contains a variety of tiles for users to navigate to their essential work. Every time you log in, the system defaults to your main Homepage with related tiles. By default the Employee Self Service Homepage page will launch in both PeopleSoft HCM and Financial environments.</p> <p>The Homepage header contains several useful features:</p> <ol style="list-style-type: none"> Homepage Title Banner Icons Tiles- Links to specific groups of tasks. Tiles present depend on your security access and may vary by individual. <p><i>Note: Many homepage tiles are collections of pages; however some may be direct links to a single page.</i></p> <ol style="list-style-type: none"> Homepage swipe—Each dot indicates homepages available in the Homepage title. Homepages are role specific so most users will only have one dot. <p>If more than one homepage exists, Click on a dot to toggle between Homepage.</p> <ol style="list-style-type: none"> Refresh icon



Feature	Description
<p>Banner Icons</p>	<p>Banner icons located on the top right of banner contain action items available for user.</p> <ol style="list-style-type: none"> Home — Navigates back to Main Homepage. Search—<i>Function will be available in the near future.</i> Actions List — Depending on the page in the application, you have the ability to personalize Homepage, view or change your preferences, access Help, and Sign Out. NavBar-- Contains navigation icons and links to enable users to get anywhere in the PeopleSoft system. 
<p>NavBar</p>	<p>*Arrangement of icons on NavBar may vary</p> <p>Recent Places — Displays the most recent places you viewed in the application as links, including both fluid and classic pages, for quick access.</p> <p>My Favorites— Displays any pages that have been added as a favorite (even those saved prior to the update).</p> <p>Navigator— Displays traditional menu structure where content is listed in a linear layout. Use this feature to access pages that are not included in the tiles on Homepage.</p> <p>Classic Home— Takes you to the classic version of PeopleSoft portal homepage (with breadcrumb navigation). If preferred use this to navigate through the system using familiar screens available before the upgrade.</p> 

Feature	Description
<p>Navigation Collection</p>	<p>Navigation Collection pages group similar component pages together.</p> <p>Collection is displayed in a two panel layout with links displayed in the left panel and the selected component displayed in the right.</p> <p>Components may be either Fluid or Classic, individual links or grouped into folders.</p> 
<p>Mobile Experience</p>	<p>PeopleSoft application fluid pages scale from large screen devices such as laptops and desktops down to the reduced viewing space of tablets and smartphones.</p> <p>Slight variations exist on the same page depending on the browser and device being used. The page adjusts to the smaller screen size so some buttons may not appear on the device or may be in a different location. While most of these variations are subtle, they have no impact on performance of the application.</p> <p>If you can't find an icon, remember to look under the Actions List drop-down.</p> <p><i>Example: The Home button doesn't appear in the banner when using a tablet in portrait mode, a smartphone, or even a small browser window on a desktop or laptop computer.</i></p> 

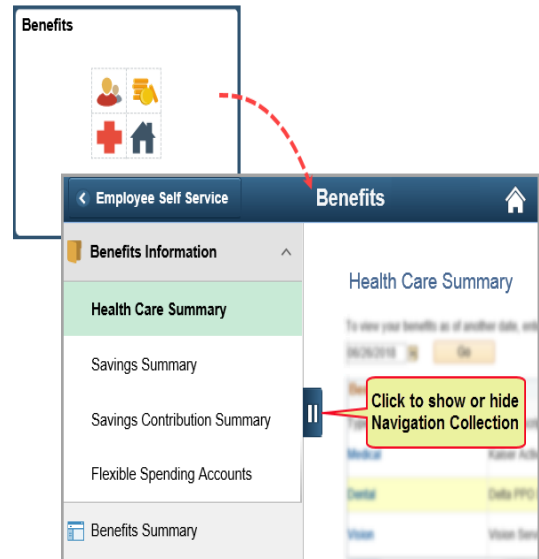
How to Navigate

Using Tiles

Using Tiles on a Homepage to navigate

1. **Click** the tile that represents the application page you wish to access.
2. **Browse** through the list of pages to locate the page you want to open. **Click** the link.
3. Use the **back button** in the banner to go back to the previous menu selection.

Note: The back button acts the same when you use the Navigator to access pages.



Using Links

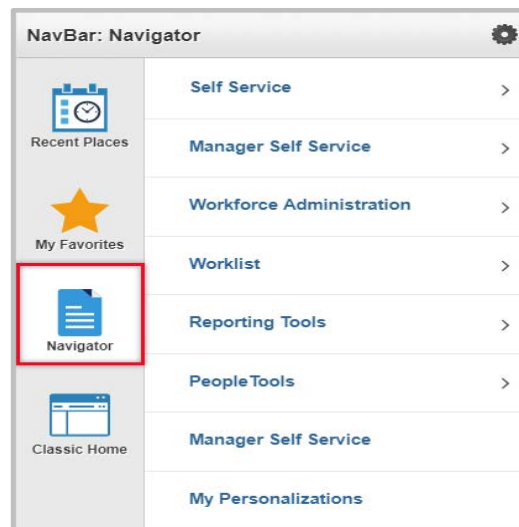
Using links in the Navigator to navigate

1. **Click** the NavBar icon from the Banner.
2. **Click** the Navigator icon.
3. **Browse** and click through the links to open new pages. Items displayed with > have multiple pages.

Note: Once you've navigated, either from Homepage or the NavBar, there is a Back link that returns you to the Homepage. If not, proceed to step 4.

4. **Click** arrows to go back or return to the main Navigator (root) menu:

- **Left-pointing arrow** at the top of the NavBar to go back one level.
- **Downward arrow** (far right) to return to the main Navigator (root menu).

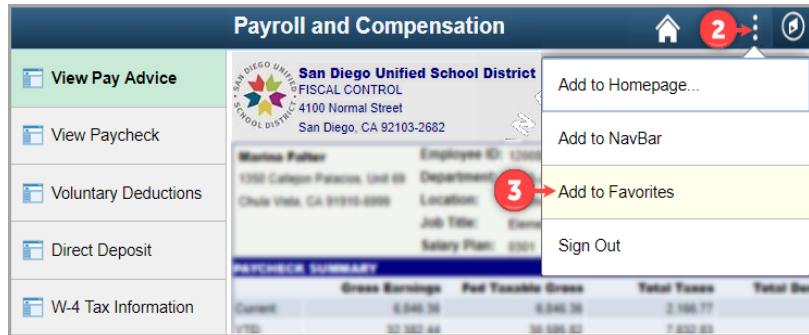


Personalization Options

My Favorites

Add Links to My Favorites

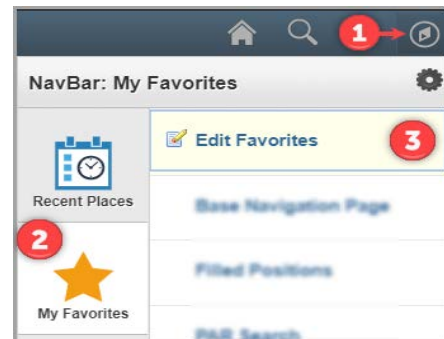
1. **Navigate** to the page you wish to add.
2. **Click** the Actions List icon.
3. **Click** Add to Favorites.
4. **Edit** Description (if desired).
5. **Click** OK.



Note: To add components to Homepages and the NavBar, select those options in the Actions List.

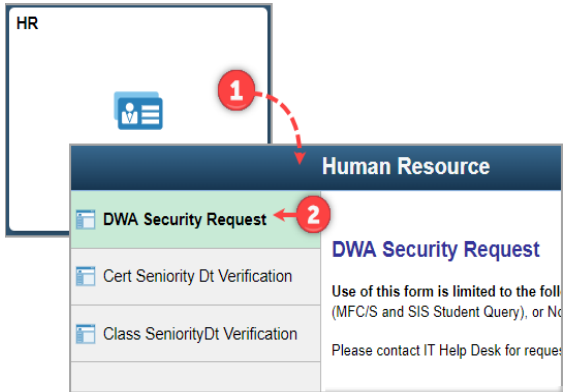
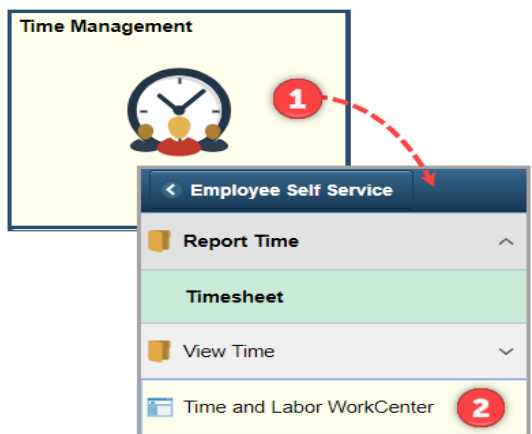
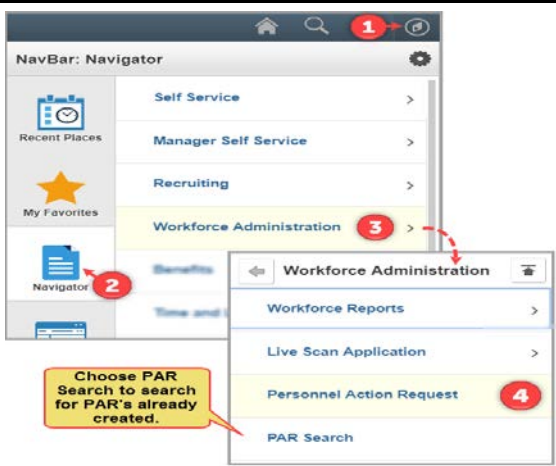
Remove and Reorder Links in My Favorites

1. **Click** the NavBar.
2. **Click** the My Favorites icon.
3. **Click** the Edit Favorites link.
 - a. Enter numbers starting with zero in sequence number fields to reorder tiles.
 - b. Click the minus sign to remove a tile from the list.
4. **Click** Save.



Quick Start Tips

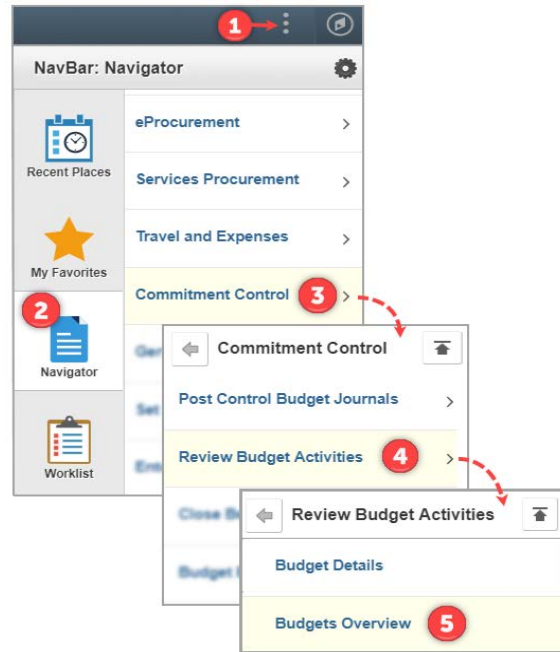
Follow these steps to quickly access common tasks in PeopleSoft Applications.

PeopleSoft Human Capital Management (HCM)	
DWA Security Request	<ol style="list-style-type: none"> 1. Select HR tile from Homepage. 2. Choose DWA Security Request link from Navigation Collection.  <p>The screenshot shows a 'HR' tile on a homepage. A red circle with the number '1' is placed over the tile. A red arrow points from this circle to a 'Human Resource' navigation collection. Inside this collection, a red circle with the number '2' is placed over the 'DWA Security Request' link. To the right of the screenshot, a snippet of the 'DWA Security Request' form is visible, with the text: 'Use of this form is limited to the foll (MFC/S and SIS Student Query), or No Please contact IT Help Desk for reques'.</p>
Time & Labor	<ol style="list-style-type: none"> 1. Select the Time Management tile from the Homepage. 2. Select the Time & Labor WorkCenter link in the Navigation Collection.  <p>The screenshot shows a 'Time Management' tile on a homepage. A red circle with the number '1' is placed over the tile. A red arrow points from this circle to an 'Employee Self Service' navigation collection. Inside this collection, a red circle with the number '2' is placed over the 'Time and Labor WorkCenter' link.</p>
PAR	<ol style="list-style-type: none"> 1. Select NavBar icon from banner 2. Select Navigator. 3. Click on Workforce Administration. 4. Select Personnel Action Request.  <p>The screenshot shows a 'NavBar: Navigator' interface. A red circle with the number '1' is placed over a search icon in the top right. A red arrow points from this circle to a 'Navigator' icon in the left sidebar, which has a red circle with the number '2' next to it. Another red arrow points from the 'Navigator' icon to the 'Workforce Administration' link in the main menu, which has a red circle with the number '3' next to it. A final red arrow points from the 'Workforce Administration' link to the 'Personnel Action Request' link in a sub-menu, which has a red circle with the number '4' next to it. A yellow callout box at the bottom left of the screenshot contains the text: 'Choose PAR Search to search for PAR's already created.'</p>

PeopleSoft Finance Supply Chain Management (FIN)

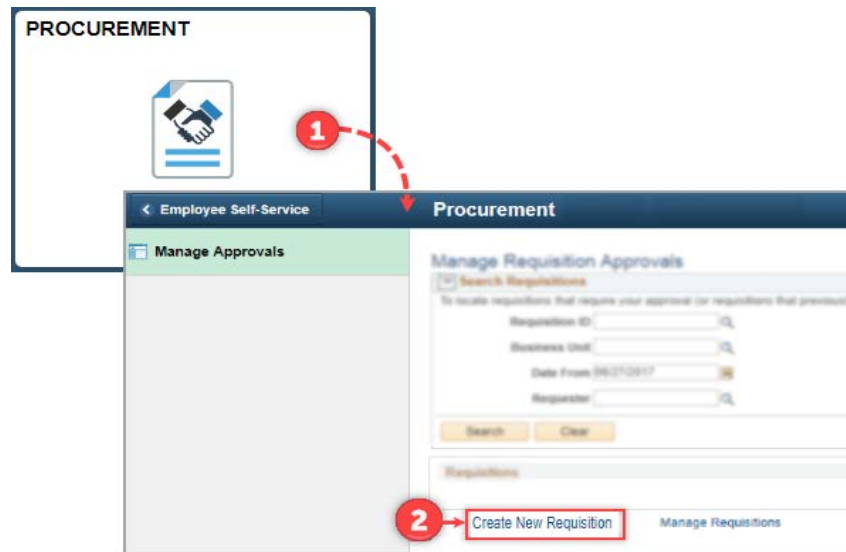
Budgets

1. **Select** NavBar icon from banner
2. **Select** Navigator.
3. **Scroll** down the menu then **select** Commitment Control.
4. **Select** Review Budget Activities.
5. **Select** Budgets Overview.



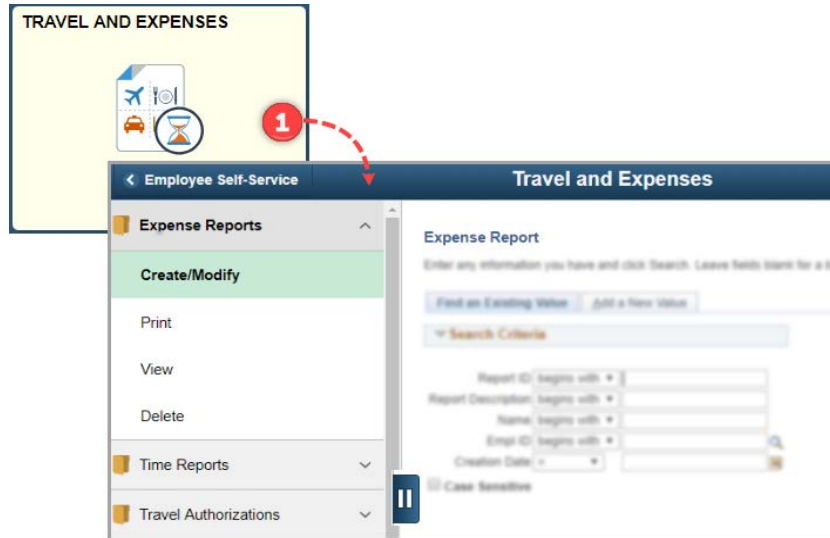
eProcurement

1. **Select** Procurement tile from Homepage.
2. **Click** the “Create New Requisition” link to start a new requisition.



Travel &
Expenses

1. **Select** Travel and Expenses tile from Homepage.
2. **Choose appropriate link** from Navigation Collection.



Frequently Asked Questions

1. How do I sign out of PeopleSoft?

Logging out of PeopleSoft is very simple. Just click the **Actions List** icon and select **“Sign Out”**.

2. Will I have to add my favorites again?

No. Saved favorites will be accessible after the upgrade. You can access My Favorites by clicking on the **NavBar** banner icon, then select the **My Favorites** icon.

3. I don't like this new version. Am I able to view PeopleSoft the old way?

Yes. For the time being you can switch back to the classic look of PeopleSoft. Follow these steps to activate classic pages:

- a) Click on the **NavBar** banner icon
- b) Select **Classic Home**.

Note: The setting applies to the currently logged on session only. Meaning this setting will have to be reset during each logged in session.

4. Why don't I see a menu when I sign on?

The menu page was probably not configured correctly before the upgrade. Follow these steps to configure menu page:

- a) Select the **NavBar** banner icon from the HomePage.
- b) Click **“Classic Menu”** icon.
- c) Click **My Page** from the Classic Menu.
- d) Click the **Content** link in the upper right corner of the page.
- e) Check **“Menu”** or **“Menu Classic”**.
- f) Click **Save** button.

5. Why doesn't the search feature work?

The search feature will require more testing and may be available in the future.

6. Who can I call for help?

Please use this document or the [Technical & Troubleshooting Guide](#) to help resolve issues first, as they may have been previously described. IT Help Desk is willing to assist or escalate technical issues that occur on district standard workstations only. (Limitations to support are increased when using mobile devices such as phones or tablets). They can be reached by phone at 1 (619) 209-HELP (4357).