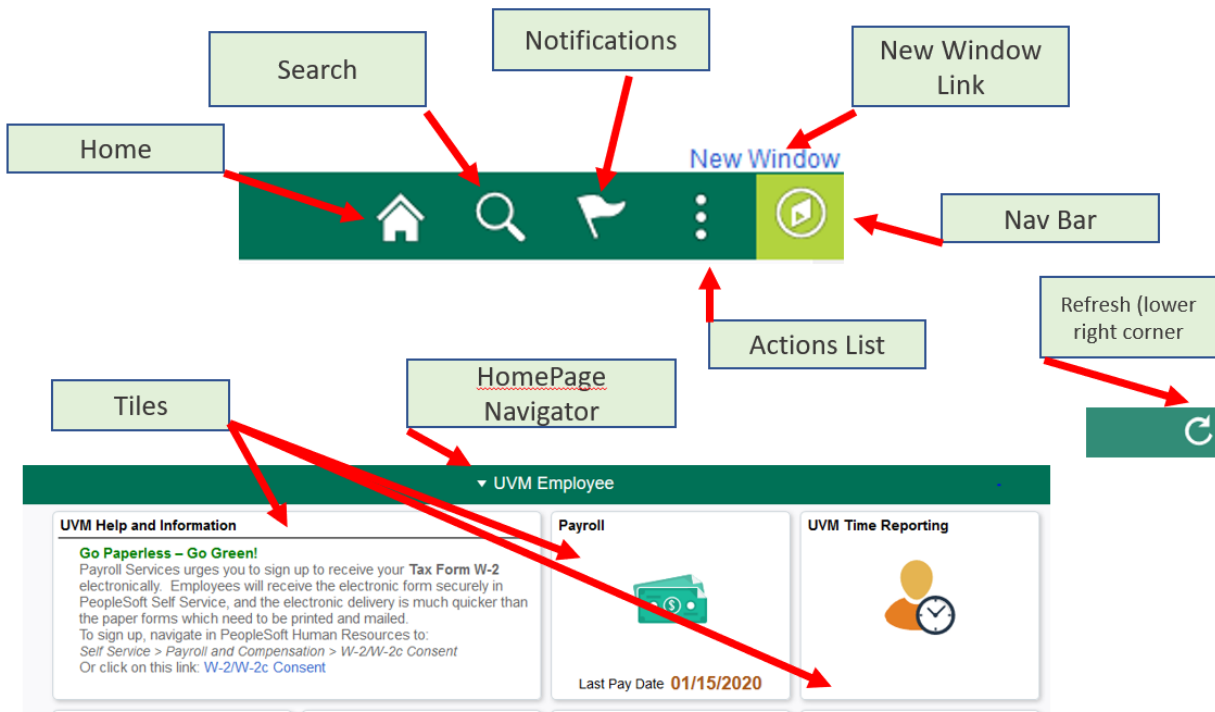The University of Vermont

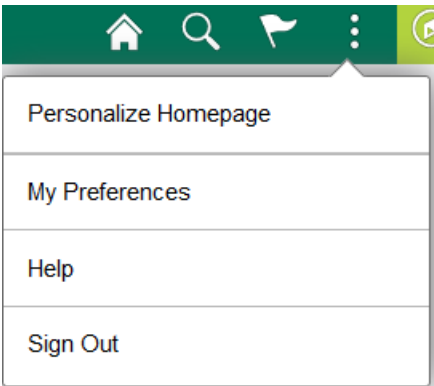# PeopleSoft Fluid User Interface Guide
Published by: Enterprise Application Services
April 2020

Key Terms

Welcome to the PeopleSoft Fluid User Interface! All the key terms necessary to get started with the new Interface can be found below.

Actions List

The "Actions List" button can be found at the top right of the page. This button allows the user to perform specific actions while either on the Homepage or on a specific page.

From the Homepage, the "Actions List" button allows the user to personalize the Homepage, change the settings through "My Preferences", get help from Oracle through "Help," or sign out of the account.
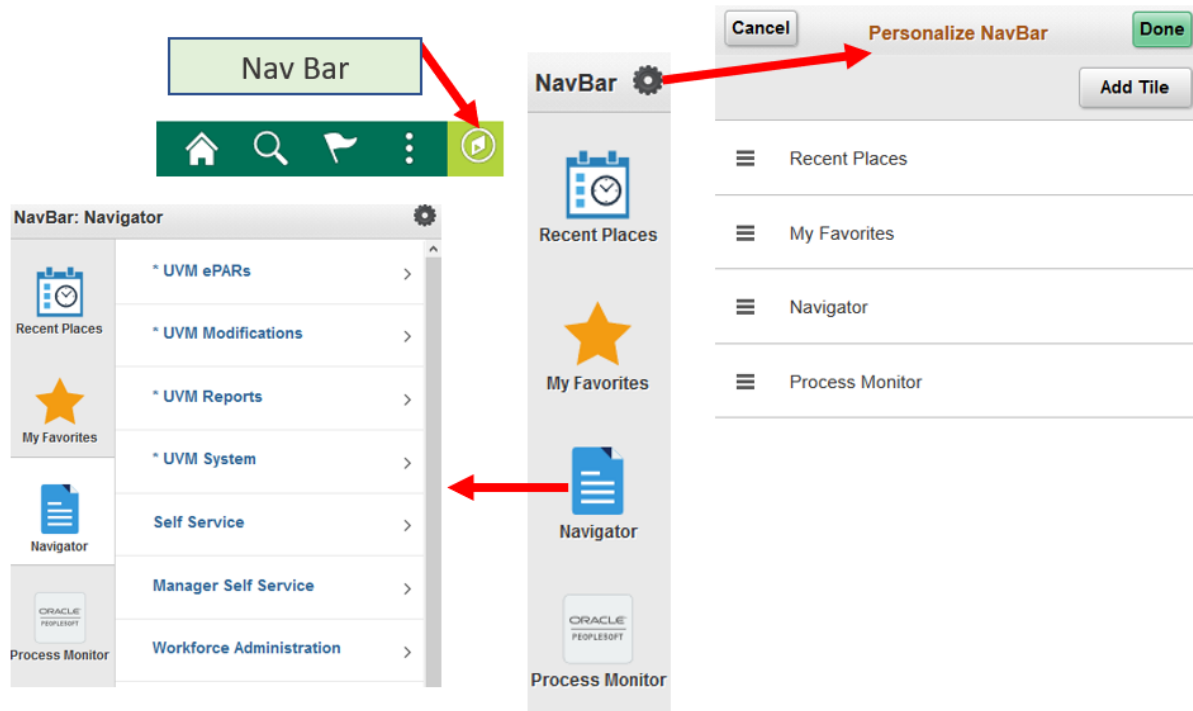
If the user navigates to a specific page, the menu of the "Actions List" button will change. The user will now have the option to add the specific page to the Homepage, NavBar, or favorites. The user will still have the options of changing the settings and signing out.
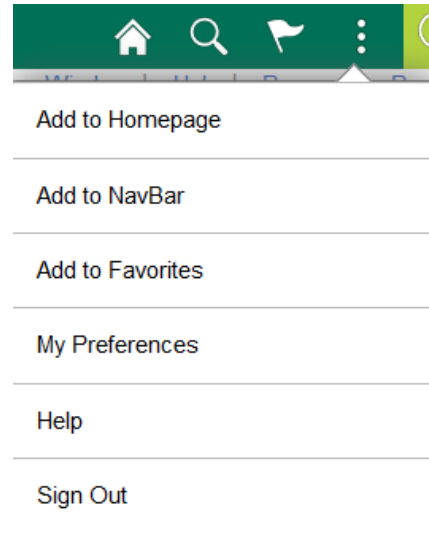
NavBar

The "NavBar" button can be found at the top right of the page. This tool is used to navigate through all pages in PeopleSoft that you have access to. When the NavBar is opened, the User has the option to view recent places, favorites, or navigate through files using the "Navigator". The "Gear" icon takes allows you to Personalize your Nav Bar by adding tiles or dragging the items to rearrange them.

Press the Navigator Icon to arrive at a menu of items, which has the same structure as the menu you currently see in PeopleSoft. It just looks different.

Navigating to a Specific Page

There are three ways to search for a specific page.

Option 1:

- Select the "NavBar" at the top right of the page.
- Select the "Navigator" button then navigate the menus and select the desired page.
- Once within the menus, select the "Back: Root" button, if needed, to return to the previous menu.
- Select the "Back to Root" button within the Navigator, if needed, to return to the root of all the
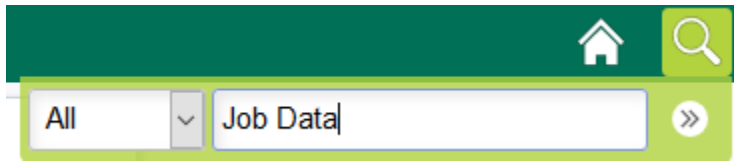

files in the Navigator.

Option 2:

Select a tile on the desired Homepage. Navigate the folders on the left-hand side menu bar to find the desired page.

Option 3

Use the Search feature.

Homepages

Return to the default Homepage by selecting the "Home" button on the top right of the page:
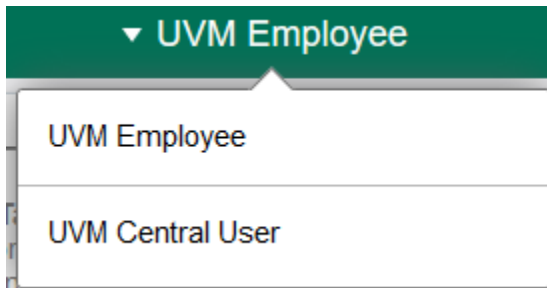

To navigate Homepages, return to the current Homepage by selecting the "Back" button at the top left of the page:

Most people will only have one homepage, the UVM Employee homepage. Some central users will have a homepage to display the tiles they need for processing payroll and so on. For those users, their dropdown will look like this:

Once at a Homepage, the title of the current Homepage will be displayed at the top of the page. Select on the title, to view all available Homepages.

Creating a New Homepage

- To create a new Homepage, select the "Actions List" button on the top right of the page.
- Select "Personalize Homepage" from the drop-down menu.
- Select the "Add Homepage" button at the top left of the page.
- Once selected, decide between Choose from available homepages OR create a new Homepage.
- If Choose from available homepages is selected, a new Homepage will be added with default tiles that corresponds to the title of that specific option.

- If Create a new Homepage is selected, create a title for the new Homepage in the field that says "Add New Homepage" and select "Add".
- Once the new Homepage is added, select the green "Save" button at the top right of the page to save the new Homepage(s).
- NOTE: Once a new Homepage is created, it will be blank. You will need to add tiles to it.

Deleting a Homepage
- Select the "Actions List" button at the top right of the page and select "Personalize Homepage" from the drop-down menu.
- A red "X" will appear next to the rest of the Homepages. Select the red "X" and the Homepage(s) will be deleted.
- Once the new Homepage(s) is/are deleted, select the green "Save" button the top right of the page to save the changes.

Adding a new Tile
- Select the "Actions List" button at the top right of the page and select "Personalize Homepage" from the drop-down menu.
- Select which Homepage the tile should be added to.
- Select "Add Tile" at the top right of the page.
- Search for a tile using the search bar or navigate the available menus until the desired tile is found.
- Once the new tile is added, select the green "Save" button the top right of the page to save the changes.

Creating a new Tile from a Specific Page
- Navigate to a desired page using the Navigator. Select the "Actions List" button from the top right of the page and select "Add To Homepage."
- Select which Homepage the tile will be added to then the tile will be added to that Homepage.

Moving Tiles from HomePage to HomePage
- Select the "Actions List" button at the top right of the page and select the "Personalize Homepage" button from the drop down menu.
- Find the tile to be moved/copied, select the small square box with a small pencil at the bottom right of the tile.
- Choose to move or copy the desired tile then choose which Homepage the tile will go to.
- Once the new tile is moved/ copied, select the green "Save" button the top right of the page to save the changes.

Deleting a Tile

- To delete a tile, select the "Actions List" button at the top right of the page and select "Personalize Homepage" from the drop down menu.
- Choose the Homepage to remove the tile from.
- Select the red "X" on the top right of the tile and the tile will disappear.
- Once the new tile is moved/ copied, select the green "Save" button the top right of the page to save the changes.

Adding a Page to Your Favorites/Nav Bar

- Navigate to the desired page using the Navigator within the NavBar.
- Once at the desired page, select the "Actions List" button at the top right of the page and select the "Add to NavBar" for the page to be added to your NavBar OR select "Add To Favorites" for the page to be added to favorites.