



**OKLAHOMA**  
Office of Management  
& Enterprise Services

**PEOPLESOFT  
FINANCIALS 9.2**

User Guide: Navigating the new Fluid User Interface

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## 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.
- Go over some of the new features.
- Provide steps on how to navigate and customize user experience.

New PeopleSoft Financials link: <https://financials.ok.gov/>

## 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.

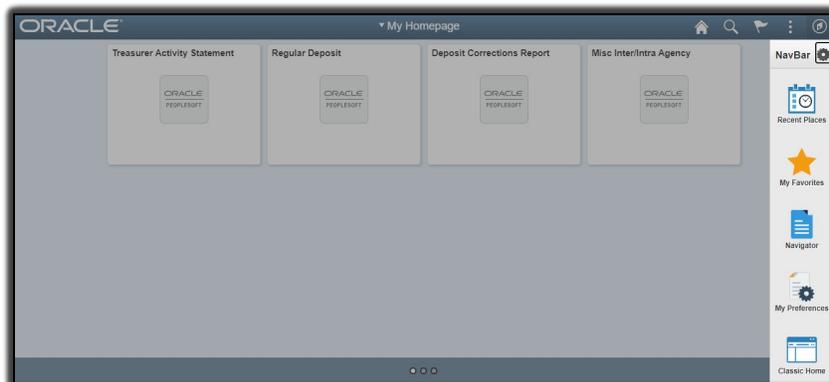
The new Fluid UI does not change how the user currently performs functions in the system. This mainly changes the look and feel of the screens and how you navigate the homepage and the Fluid styling of the interface.

Fluid navigation focuses on:

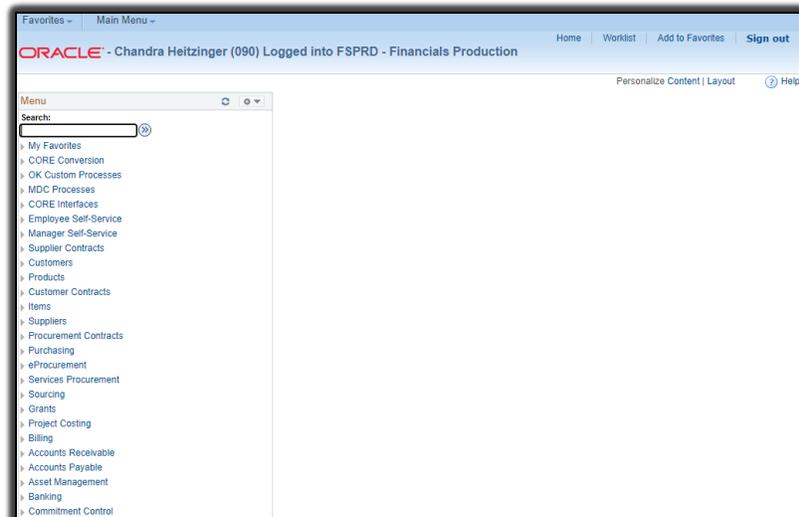
- Providing users with multiple paths to access functionality.
- Allowing users to choose the path that is most effective for them.
- Using related actions to make navigation work across all paths.

### 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.



Homepage showing new Fluid UI with custom navigation tiles and NavBar displayed.



Homepage in PeopleSoft 9.2 PUM5, prior to upgrade.

## Component

A component is another term for module. Some examples of components in PeopleSoft are Accounts Payable, Purchasing, General Ledger and Accounts Receivable.

## 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

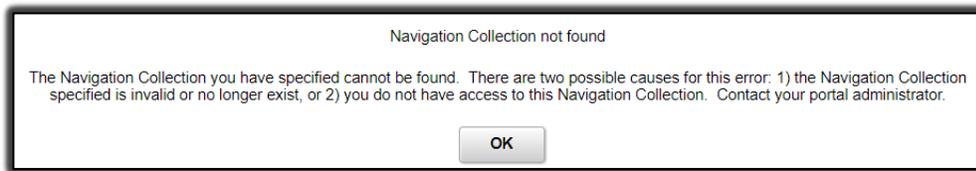
These tiles (shortcuts) will take the user to a specific task. For example, creating a Regular Deposit.

### 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.

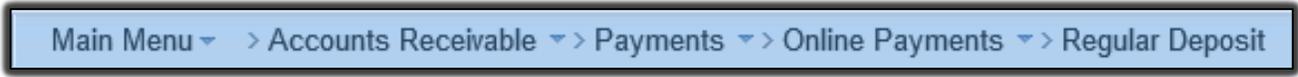
Therefore, we strongly urge users to utilize one of the following options to navigate the system:

- **NavBar > Navigator.**
- 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

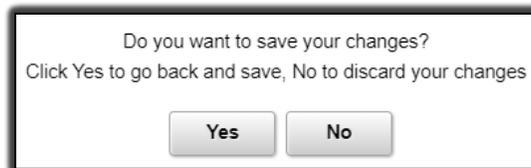
The ribbon at the top of the screen is referred to as the banner, which contains the main elements a user will utilize to navigate the system.



### 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.



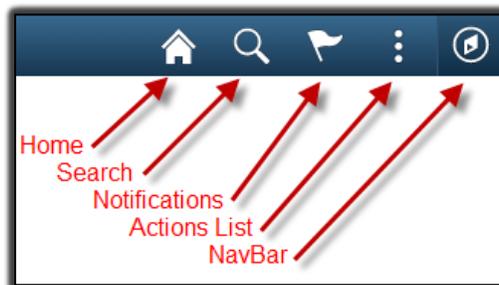
Save alert.

### Page title

Refers to the current page the user is on.

### Icons (banner actions)

There are five icons located in the top right corner of the banner: Home, Search, Notifications, Actions List and NavBar.



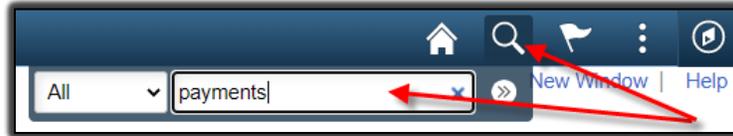
Banner icons

### Home

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

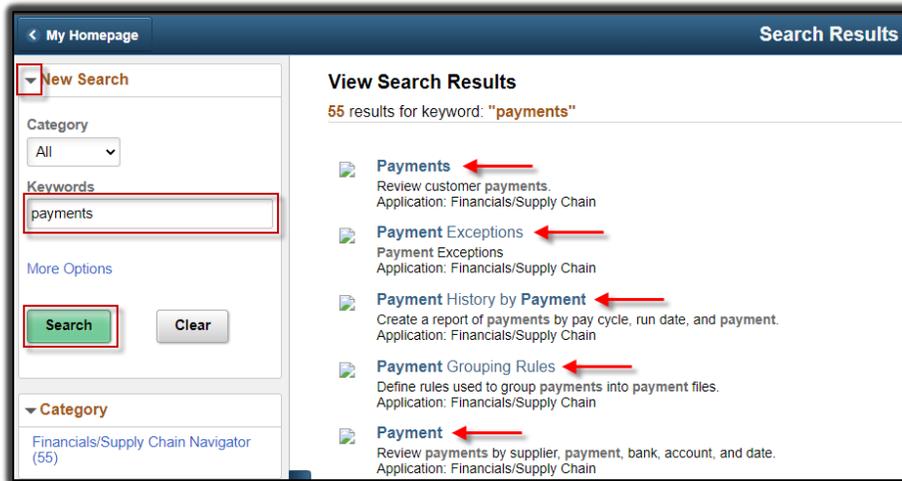
## Search

This allows the user to search the entire system for keywords related to a function or task they are looking for.



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 result window

## Notifications

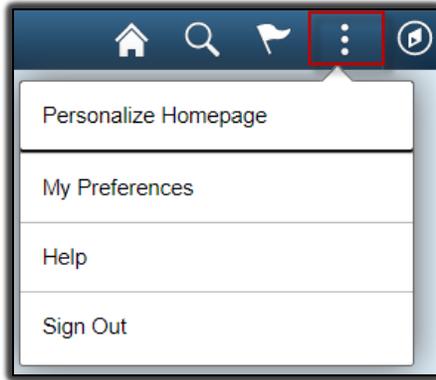
The **Notifications** icon will display a badge with a number count on the flag icon in the banner to notify the user of any new **actions** or **alerts**. These notifications include links that allow users to navigate directly to an item that needs attention. Currently, **Notifications** are configured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

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

## Actions List

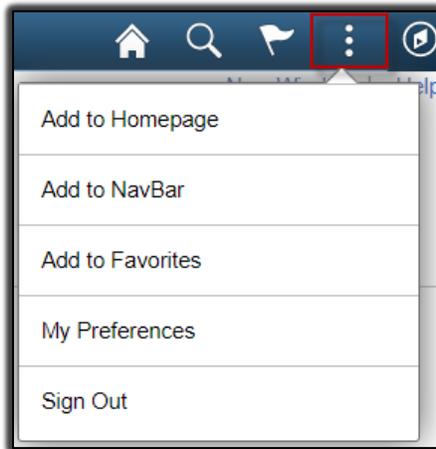
These **actions** are different from the actions within the **Notifications** menu. This icon allows users to perform certain actions while on the **homepage** and different actions when on a page within the system.

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



*Actions List from homepage.*

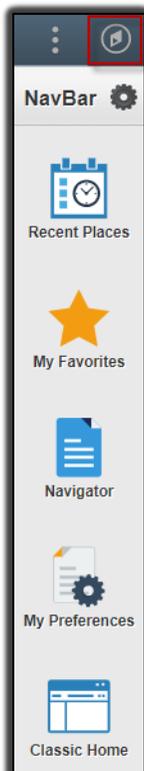
- From any other page, the user can perform the following actions:



*Actions List from a component page.*

### **NavBar**

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

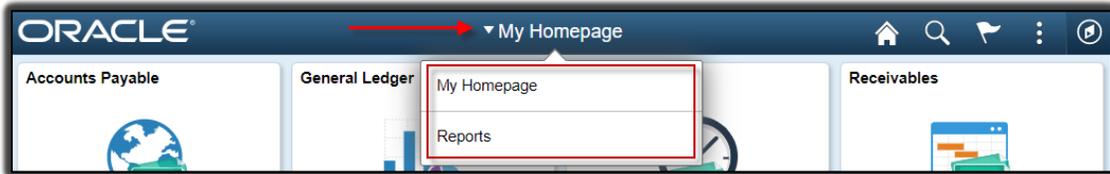


## Personalizing the homepage

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

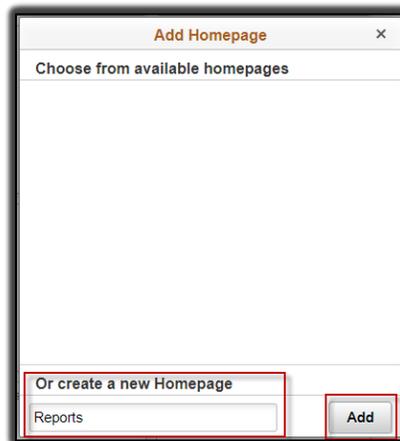
When the user logs in, the default homepage is titled **My Homepage**. A user can create additional homepages to help them organize their tasks on separate pages. They would navigate between the different homepages by selecting **My Homepage** and then the desired page from the drop-down menu.



Actions List from a component page.

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 **Actions List** icon.
- Select **Personalize Homepage** from the menu.
- Select **Add Homepage** button from the upper left corner of the screen.
- In the **Add 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.
- User will now see a new blank homepage titled **Reports**.



Add (new) Homepage setup screen.

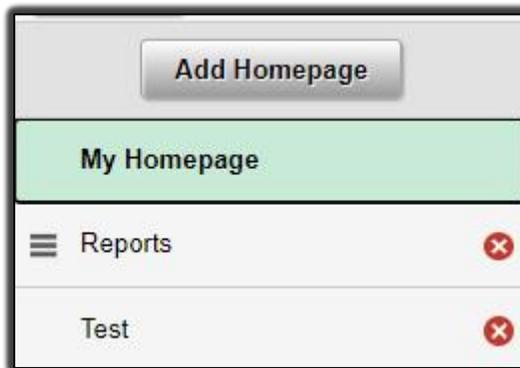
To add new tiles to the Reports homepage, users can follow the steps under [Add navigation tile to homepage](#). In this example, we have navigated to several different reports in the system and added them to the new **Reports** homepage.



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 **Actions List** icon.
- Select **Personalize Homepage** from the menu.
- Select **My Homepage** in the left menu. A red **X** should appear next to the rest of the homepages.
  - Note: You will need to select a homepage, other than the one you are trying to delete, before the red **X** will appear.
- Select the red **X** 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 > Navigator > Reporting Tools > Query > Query Viewer.
- Select the **Actions List** 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.



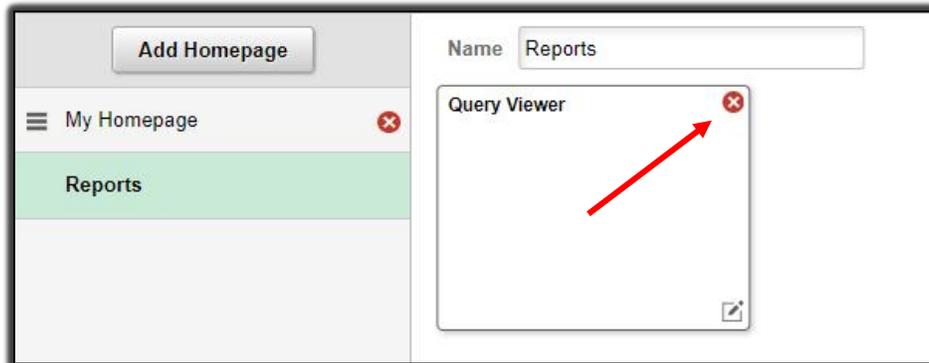
*Add (tile) To Homepage setup screen.*

- 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 **Actions List** icon from the upper right corner of the screen.
- Select **Personalize Homepage**.
- Find the tile to be removed and select the red **X** button 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.*

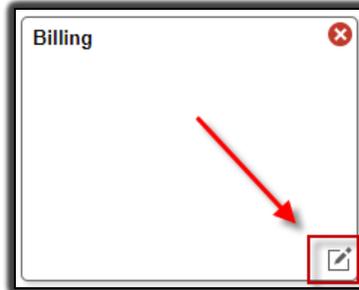
### Arrange tiles on a homepage

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 **Actions List** icon from the upper right corner of the screen.
- Select **Personalize Homepage**.
- Locate the tile to be moved.
- You can **alter the sequence** in which the tiles appear on the homepage using drag and drop. Select and hold the tile icon and drag it to the desired position, then release. The dotted yellow line indicates the tile you are dragging, and the solid yellow 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 **Actions List** icon from the upper right corner of the screen.
- Select **Personalize Homepage**.
- Locate the tile to be moved or copied.
- Select the **small square box with a pencil** 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.*

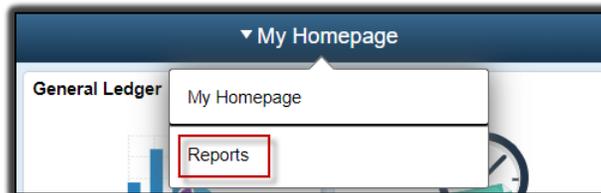
- Select the homepage **to** which the tile is being moved.



*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.

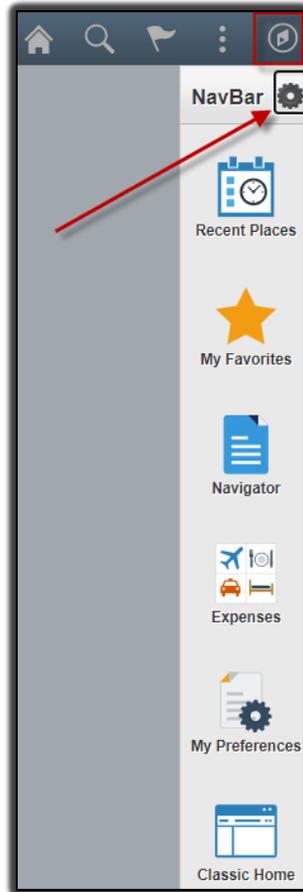


*Select the homepage section from the banner to navigate to a different homepage.*

# Navigating the NavBar

## Personalize NavBar (gear tile)

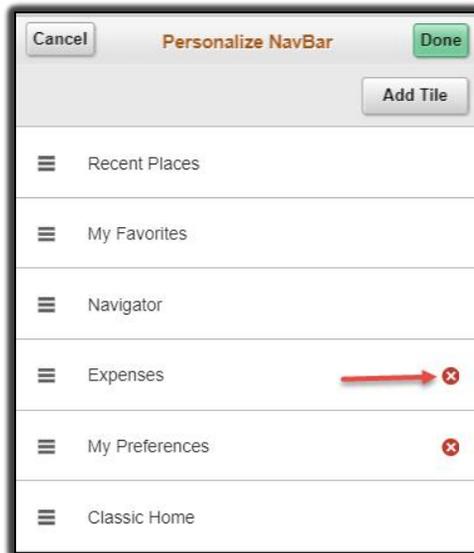
This icon provides limited customization as to what tiles are displayed on the NavBar. Users can add, remove and reorder tiles like they can on the homepage.



*Personalize NavBar from the gear tile.*

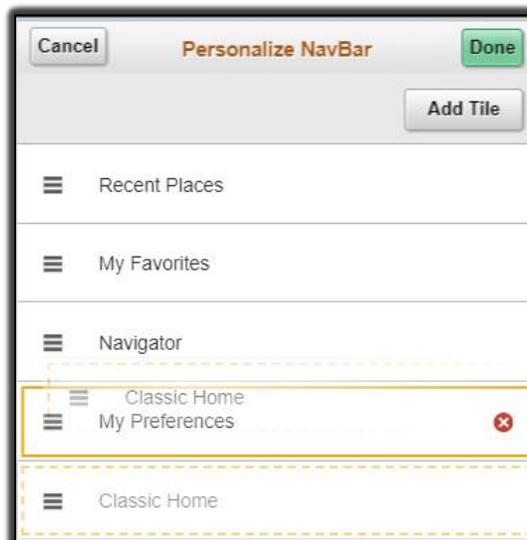
## Remove a tile from the NavBar

- 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 red **X** next to the tile to be removed.
- Select **Done**.



*Removing a tile from the NavBar.*

You can **alter the sequence** in which the tiles appear in the pane using drag and drop. Select, hold and drag the tile icon to the desired position, then release. The dotted yellow line indicates the tile you are dragging, and the solid yellow line indicates the location where you are dropping the tile.

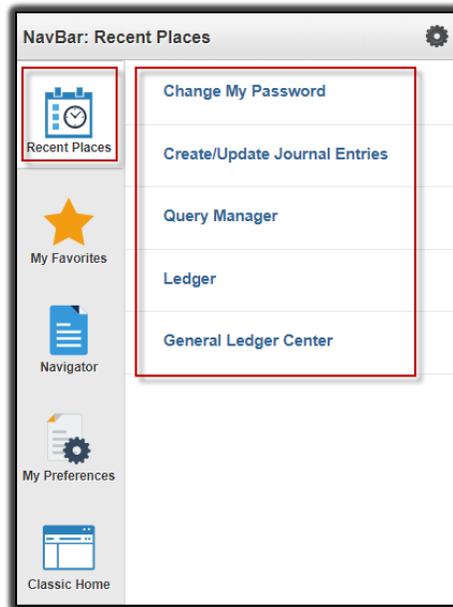


*Select and drag tile to alter the sequence tiles are displayed in the NavBar.*

**Note:** While adding tiles 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 tiles to the NavBar.

## **Recent Places**

This tile stores a list of the five most recent pages the user has viewed in the system. Users can select any of their **Recent Places** to navigate to them.

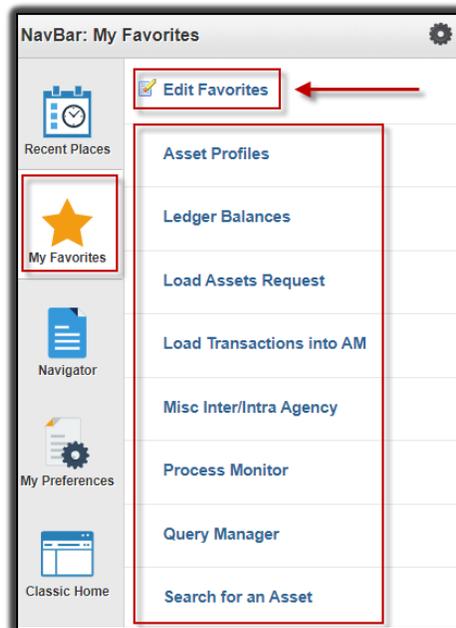


*Recent Places menu*

## My Favorites

This tile 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 > Navigator > Reporting Tools > Query > Query Viewer.
- Select the **Actions List** icon.
- Select **Add to Favorites**.
- Enter the name to be displayed in the My Favorites menu.
- Select **Add**, then select **OK**.

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

- 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.

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

- 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.

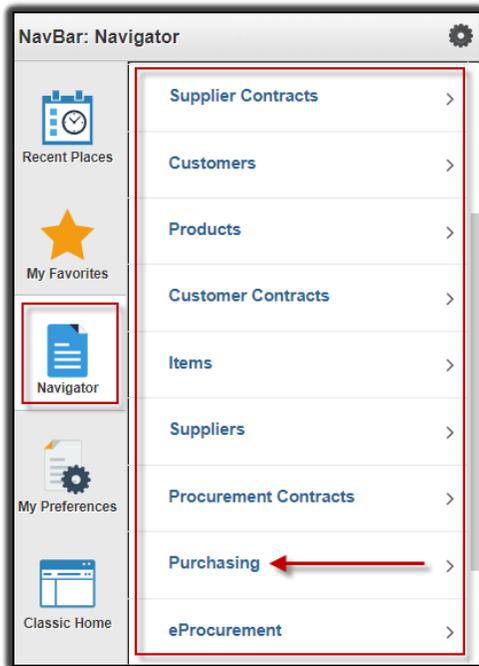
Favorites		10 rows
Delete Selected		
<input type="checkbox"/> *Favorite	Sequence number	
<input type="checkbox"/> Asset Profiles	1	
<input type="checkbox"/> Ledger Balances	5	
<input type="checkbox"/> Load Assets Request	2	
<input type="checkbox"/> Load Transactions into AM	3	
<input type="checkbox"/> Misc Inter/Intra Agency	6	
<input type="checkbox"/> Process Monitor	9	
<input type="checkbox"/> Query Manager	10	
<input type="checkbox"/> Search for an Asset	4	
<input type="checkbox"/> Treasurer Activity Statement	7	
<input type="checkbox"/> Voucher Lookup	8	

*Edit Favorites menu.*

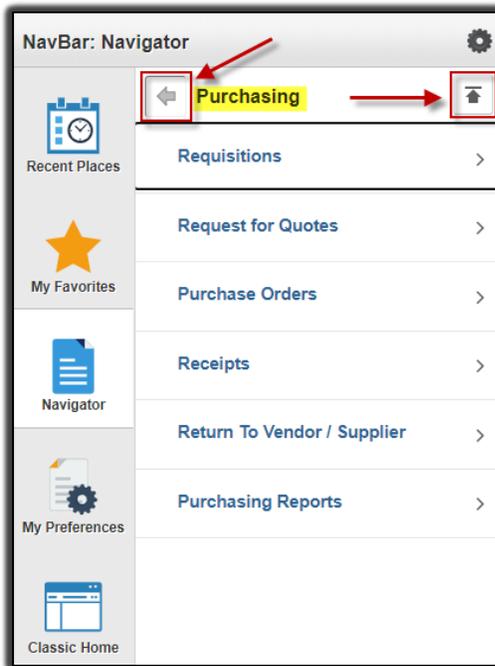
## Navigator

This tile provides access to all components to which the user has security access and is **not** customizable by the user. 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 on the right). There are two buttons next to the last menu item selected. The **back** button to the left of the menu item name returns the user to the **previous menu**. The **up** button to the far right returns the user to the main **Navigator** menu.



Navigator menu expanded.



Return one level and return to main menu button.

## Expenses

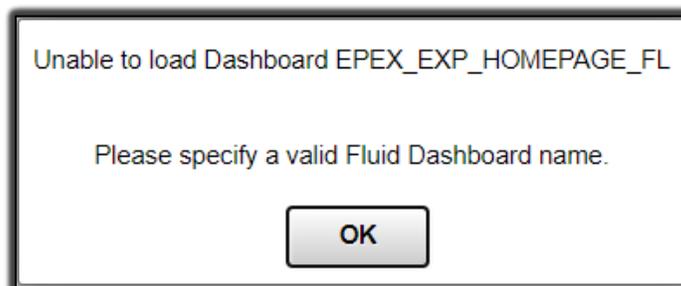
This tile will **not** work for every user. If you receive the error messages, this is not a bug. It just means your agency is not using this feature at this time, or the user doesn't have security access to this module.

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

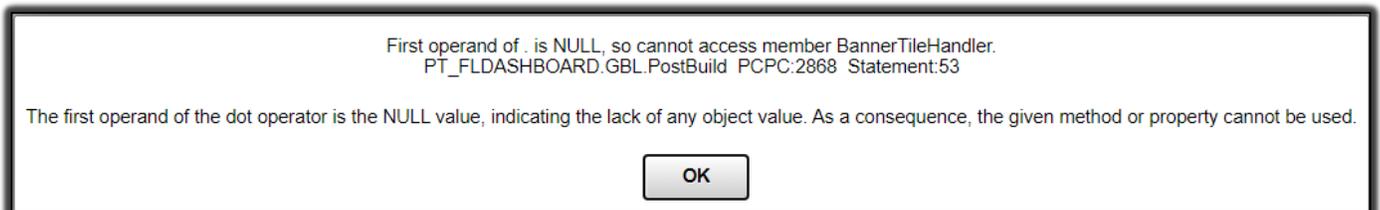
**Note:** Please do not contact the OMES Service Desk related to these messages.

When selecting the tile, several error messages are displayed.

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

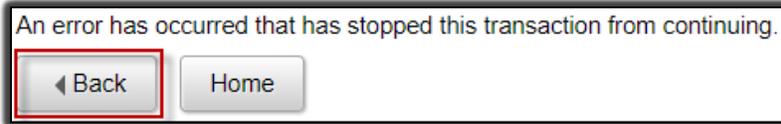


Error message 1.



Error message 2.

- Select **Back** on the last message.



*Error message 3.*

## My Preferences

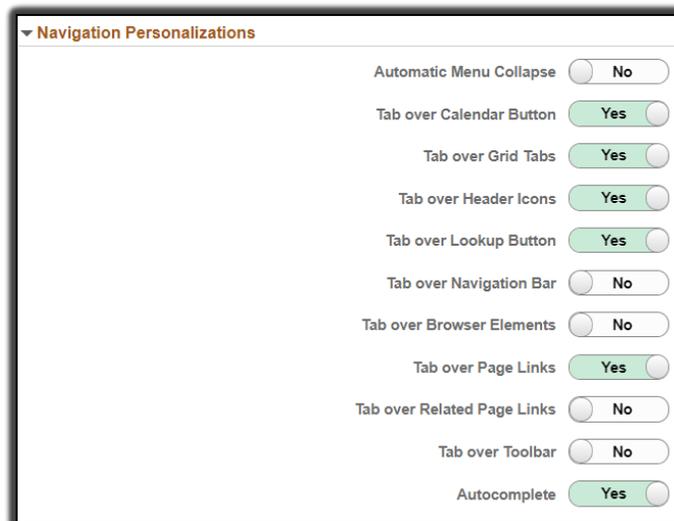
This tile contains customizable settings the user can turn on/off based on their preferences and interactions with the system (e.g., Autocomplete, Tab over Calendar button, Tab over Lookup button, Tab over Page Links, etc.). The selections made here will apply to all pages to which the user has access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

- Select the arrow next to **Navigation Personalizations** to expand the menu.



*Customizing My Preferences.*

- Review the list of options and make changes by selecting the **Yes/No** slider switch buttons.
- After all changes have been made, select the **Save** button in the upper right corner.



*Slider switch options available under Navigation Personalizations menu.*

## Classic Home

This tile 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

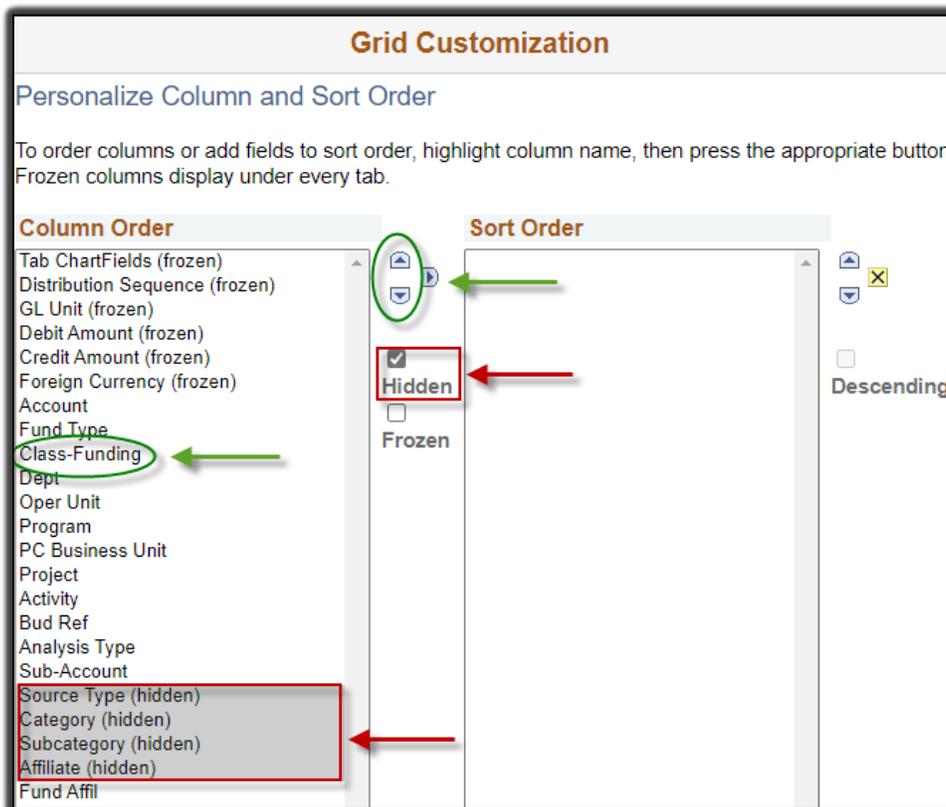
The user can **hide** accounting chart fields their agency does not utilize, allowing the user to only view fields applicable to their business needs. The examples are shown in red **boxes/arrows** in the diagram below.

- 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.



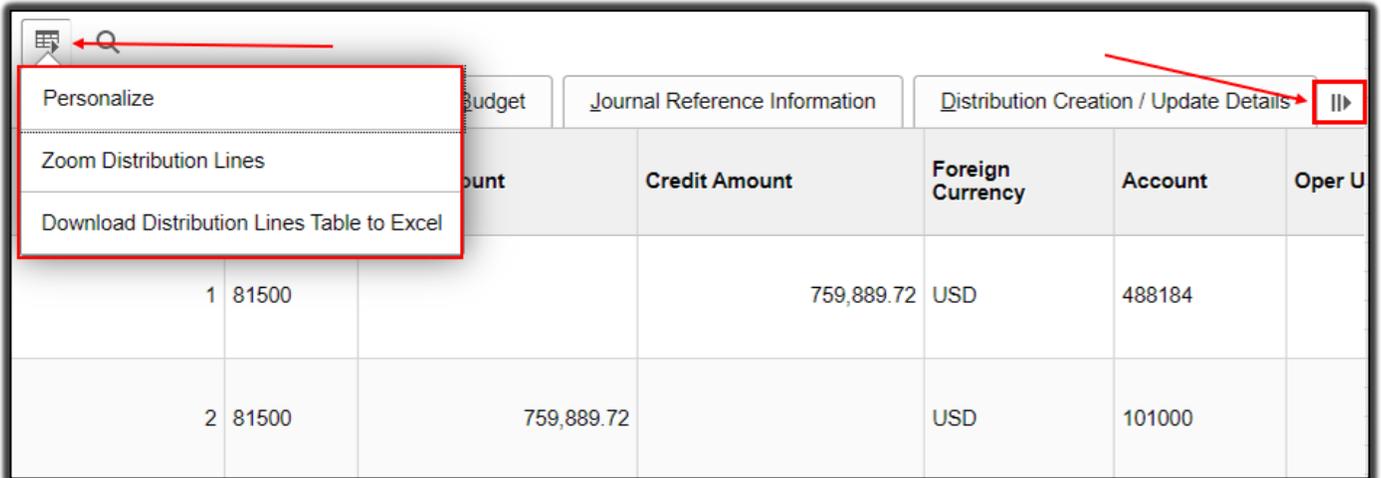
Distribution Lines

Personalize Find | [?] | [ ] First 1-2 of 2 Last

ChartFields Currency Details Budget Journal Reference Information Distribution Creation / Update Details [right arrow]

Distribution Sequence	GL Unit	Debit Amount	Credit Amount	Foreign Currency	Account	Sub-Account	Fund Type	Class-Funding	Dept
1	81500		759,889.72	USD	488184		7900	8815A	7999999
2	81500	759,889.72		USD	101000		7900	8815A	

Example of current PeopleSoft chart field screen navigation.



Personalize Zoom Distribution Lines Download Distribution Lines Table to Excel

Budget Journal Reference Information Distribution Creation / Update Details [right arrow]

	Account	Credit Amount	Foreign Currency	Account	Oper U
1	81500		759,889.72	USD	488184
2	81500	759,889.72		USD	101000

Example of new chart field screen navigation.

## Change your password

- Log in to PeopleSoft at <https://financials.ok.gov>.
- Enter your **User ID** and **Password**.
- Select **Sign In**.



ORACLE<sup>®</sup>  
PEOPLESOFT

User ID

Password

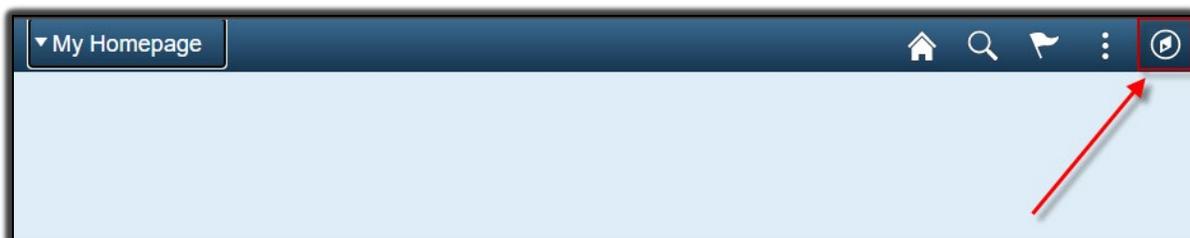
Select a Language  
English

Sign In

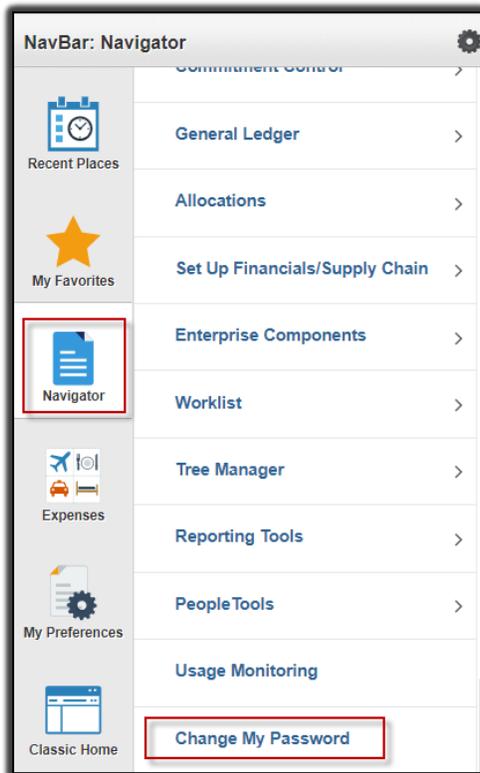
[Forgot your password?](#)

Enable Screen Reader Mode

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



- Select **Navigator**. This action displays a list of menu items.
- Scroll down towards the bottom of the list and select **Change My Password**.



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

A screenshot of the 'Change Password' form. The title bar is dark blue with the text 'Change Password' in white. Below the title bar, the user information is displayed: 'User ID CHEITZINGER' and 'Description Chandra Heitzinger (090)'. There are three password input fields, each with a label and a masked password field: '\*Current Password', '\*New Password', and '\*Confirm Password'. At the bottom of the form is a green button with the text '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 from the login screen, the user must configure a few settings before it will work.
- Log in to PeopleSoft at <https://financials.ok.gov>.
- Enter your current **User ID** and **Password**.
- Select **Sign In**.



ORACLE<sup>®</sup>  
PEOPLESOFT

User ID

Password

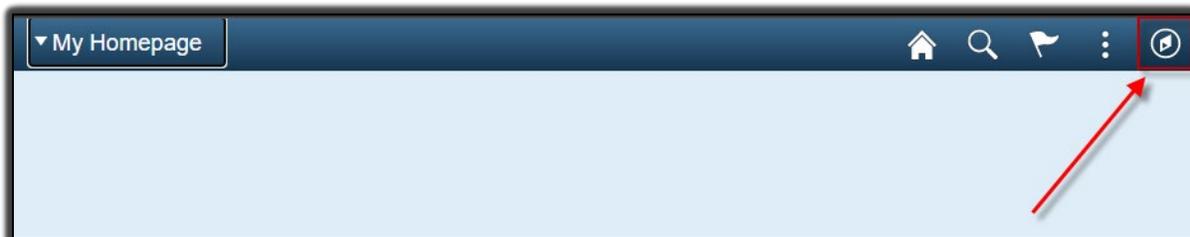
Select a Language  
English ▼

Sign In

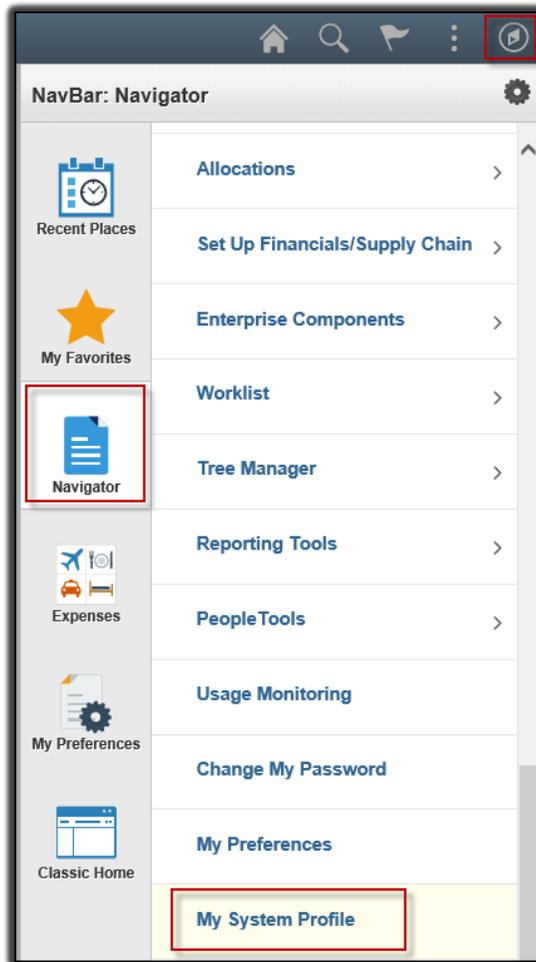
[Forgot your password?](#)

Enable Screen Reader Mode

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



- Select **Navigator**. 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 response field.
- Select **OK**.

< User Self Service

### Change or set up forgotten password help

If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authenticate you.

Question

Response

OK Cancel

In what city does your nearest sibling live?  
 In what city were you born?  
 Mother's Maiden Name  
 What is your best friend's name from childhood?  
 What is your dog's name?  
 What is your father's middle name?  
 What is your maternal grandmother's maiden name?  
 What school did you attend for sixth grade?  
 What was the last name of your third grade teacher?  
 What was your childhood nickname?  
 Which phone number do you remember from childhood?

< User Self Service

### Change or set up forgotten password help

If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authenticate you.

Question

What was your childhood nickname?

Select from the list of questions.

Response

OK Cancel

- 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**.

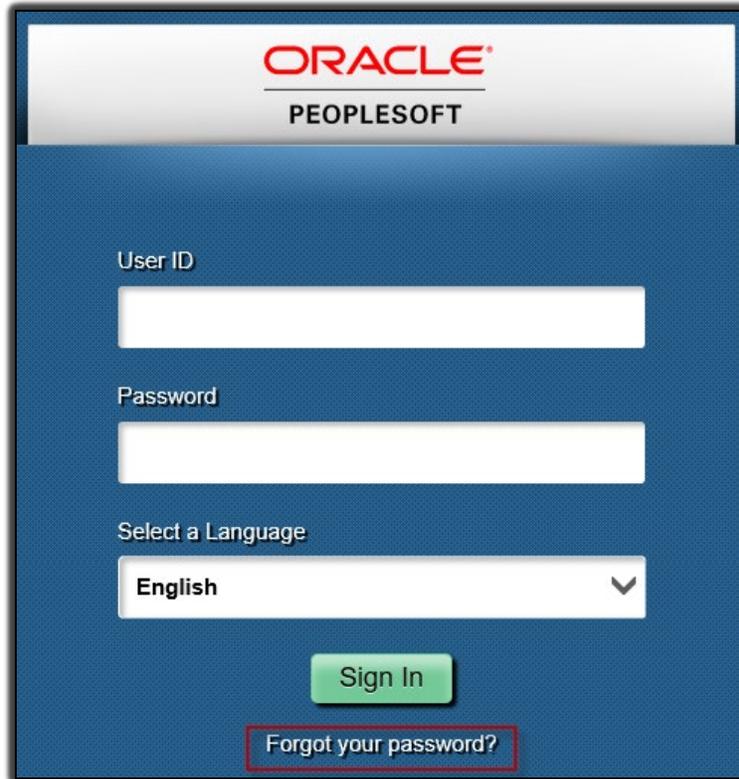
Email

1-1 of 1

Primary Email Account	Email Type	Email Address		
<input checked="" type="checkbox"/>	Business	chandra.heitzinger@omes.ok.gov	+	-

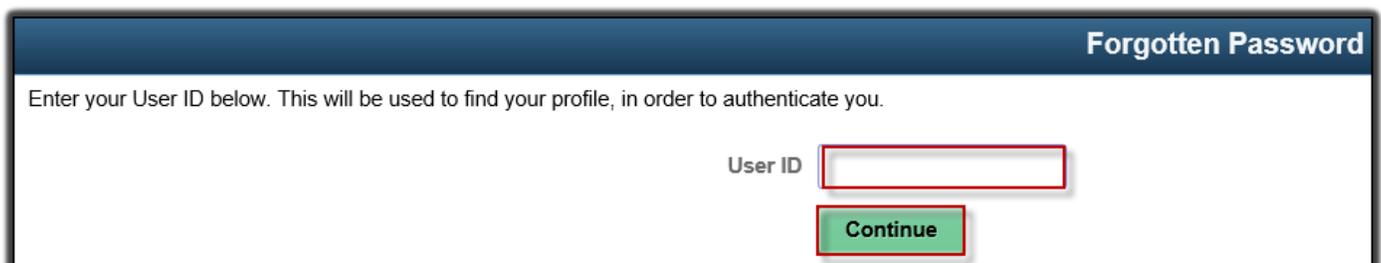
## Forgot your password - Reset

- Note: If the user has locked themselves out by entering the wrong password three or more times, you will not be able to use this feature. The user will need to contact the OMES Service Desk at 405-521-2444.
- From login screen, select **Forgot your password?**



The image shows the Oracle PeopleSoft login interface. At the top, the Oracle logo and 'PEOPLESOFT' are displayed. Below this, there are three input fields: 'User ID', 'Password', and 'Select a Language'. The 'Select a Language' dropdown menu is currently set to 'English'. A green 'Sign In' button is located below the language selection. At the bottom of the form, a red-bordered button labeled 'Forgot your password?' is highlighted.

- Enter **User ID**.
- Select **Continue**.



The image shows the 'Forgotten Password' screen. The title 'Forgotten Password' is in the top right corner. Below the title, there is a text prompt: 'Enter your User ID below. This will be used to find your profile, in order to authenticate you.' Below this text, there is a 'User ID' label followed by an empty input field. Below the input field is a green 'Continue' button.

- Enter answer in **Response** field.
- Select **Email New Password**.
- Check email account for new temporary password. The email will be from [SOKLFPRD-NoReply@iad.opc.oracleoutsourcing.com](mailto:SOKLFPRD-NoReply@iad.opc.oracleoutsourcing.com).

**Security Question**

User ID CHEITZINGER

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Please answer the following question below for user validation.

Question Mother's Maiden Name

Response

[Email New Password](#)

- Return to the login screen.
- Enter your **User ID**.
- Enter new temporary **Password** sent via email.
- Select **Sign In**.

**ORACLE**  
PEOPLESOFT

User ID

Password

Select a Language  
English

[Sign In](#)

- Select [Click here to change your password.](#)

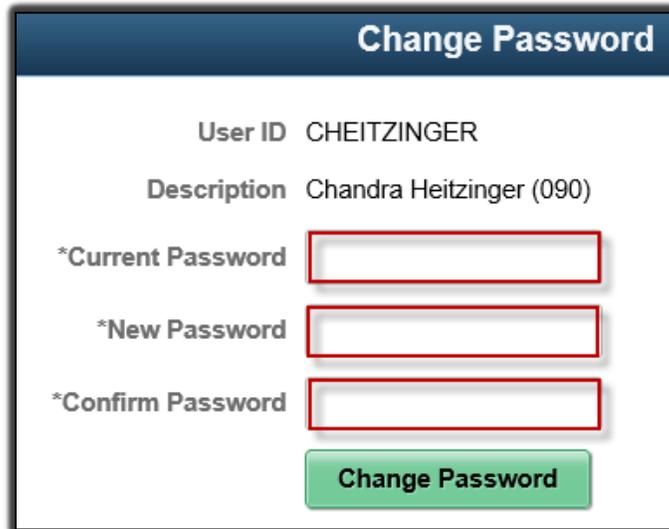
**ORACLE**  
PEOPLESOFT

Your password has expired.

[Click here to change your password.](#)

- Enter temporary password sent via email in **Current Password** field.
- Enter **New Password**.
- Enter **Confirm New Password**.

- Select **Change Password**.



The image shows a 'Change Password' form. At the top, there is a dark blue header with the text 'Change Password' in white. Below the header, the form displays the user's information: 'User ID CHEITZINGER' and 'Description Chandra Heitzinger (090)'. There are three input fields, each with a red border, labeled '\*Current Password', '\*New Password', and '\*Confirm Password'. At the bottom of the form is a green button with the text 'Change Password'.

- If the user has successfully changed the password, this message will display.
- Select **OK**.



The image shows a dialog box with a white background and a black border. The text inside reads: 'Your password has successfully been changed, Continue to Homepage?'. Below the text are two buttons: 'Yes' and 'No'.

- If the new password has been previously used, this message will display.
- Select **OK**.
- Repeat steps above for selecting a new password.



The image shows a dialog box with a white background and a black border. The text inside reads: 'Password has been previously used. Password history is retained for security purposes. Please enter a new password.' Below the text is a single button labeled 'OK'.

- User will need to enter a different password until they have successfully entered a password that has not been previously used.