

# PEOPLESOFT FINANCIALS 9.2.51

PeopleTools 8.61

User Guide: Navigating the new Fluid User Interface

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# Contents

User Guide: Navigating the new Fluid User Interface	
Contents	
Overview	5
New terminology	
What is Fluid?	
Homepage	
Component	
Tiles	
Navigation tiles	
Collection tiles	
Important notes regarding collection tiles	
Navigating the Fluid homepage	9
Breadcrumbs	9
Banner	9
Page title	9
Icons (banner actions)	9
Home	9
Notifications	
Actions List	
NavBar	
Global Search	
Open Search	
Personalizing the homepage	
Create a homepage	
Remove a homepage	
Add navigation tile to a homepage	
Remove navigation tile from a homepage	
Move a tile from one homepage to another	
Navigating the NavBar	21
NavBar	21
Personalize NavBar (gear icon)	21
Remove a menu item from the NavBar	
Recently Visited	
My Favorites	
Expenses	
My Preferences	
Classic Home	
Personalizing data grids	

	4
Hide fields	29
Reorder fields	29
Show All Columns icon	30
Change your password	31
Forgot your password – How to set up	33
Save Search Pages	37

# 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.

		_		_
- Main Menu -				
			Home Worklist Add to Favorites Si	gn
ACLE - Chandra H	leitzinger	(090) L	ogged into FSPRD - Financials Production	
			Personalize Content   Layout	3
าน	0	0 -		
ch:				
y Favorites				
ORE Conversion				
K Custom Processes				
ADC Processes				
ORE Interfaces				
imployee Self-Service				
Aanager Self-Service				
upplier Contracts				
Customers				
Products				
Customer Contracts				
tems				
uppliers				
rocurement Contracts				
urchasing				
Procurement				
ervices Procurement				
ourcing				
Brants				
Project Costing				
tilling				
ccounts Receivable				
ccounts Payable				
sset Management				
Banking				
Commitment Control				

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:

۱	Navigation Collection not found			
l	The Navigation Collection you have specified cannot be found. There are two possible causes for this error: 1) the Navigation Collection specified is invalid or no longer exist, or 2) you do not have access to this Navigation Collection. Contact your portal administrator.			
	ОК			
	specified is invalid or no longer exist, or 2) you do not have access to this Navigation Collection. Contact your portal administrator.			

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

Main Menu 🔻 > Accounts Receivable \* > Payments \* > Online Payments \* > Regular Deposit

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.



# 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:  $\leftarrow$  (My Homepage), Recently Visited and Favorites.

0 🗘	> <b>(</b>	ð 🚬 🗍	Menu 🗸	Search in Menu	Q		Û	:	Ø
Recently Visited	d Favo	age	Search H	ar	Home	Notificatio	ons Actions 1 of 4	> <sup>NavE</sup>	Bar

# Home

Banner icons

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.





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.

$\leftarrow \mid \odot \  \odot \  \textcircled{\$}$	Q Search in Menu
Search Results	
✓ New Search	View Search Results 127 results for keyword: "payments"
Search In	
Keywords	Post express deposit details using the Accounts Receivable WorkCenter.
payments	Payment           Review payments by supplier, payment, bank, account, and date.
More Options	Payment Predictor Detail           List predicted payments along with the status of each payment.
Search	Payment Information Payment Information
	Payment Forms Define payment advice forms.
Accounts Receivable (48)	Establish Payment Terms Establish Accounts Receivables payment terms.
Accounts Payable (28)	Review Supplier <b>Payments</b>
Set Up Financials/Supply Chain	Review payments made to a particular supplier
Travel and Expenses (12)	Payment Terms-Single Payment           Define payment terms to schedule a single payment for a voucher.
Customer Contracts (5)	Payment History by Payment
Banking (3)	Create a report of payments by pay cycle, run date, and payment.
Billing (2)	Payment Status

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.

	Menu v Search in Menu		Q
	Search in	<u> 1995, 1987, 1998</u> , 1997, 1998, 1998, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 19 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995, 1995	
	√ Menu		
	Category	Summary	
	All		
Γ	Accounts Payable	PEOPLESOFT	
	Asset Management		
	General Ledger		
	Supplier Information	Deposit Transfers	

Category Open Search

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

Accounts Payable 🗸	Dell	Q	
The second se		_	

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.

View Search Results	
122607 results for keyword: "Dell"	
	200 row
Voucher - 02500   00127418 Owner - U.S. DE	Actions ×
Supplier. U S PROPERT I & FISCAL OFFICE   Date: 2018-05-23   Style: Regular Voucher   Amount: 24:94 USD   Entered By: RWILLARU   Invoice ID: US2318   Entry Status: Postable   Source: Unline	Review Document Status
Voucher - 45200   00331743	
Supplier: DELL CATALOG SALES USA LP   Date: 2012-06-22   Style: Regular Voucher   Amount: 2925 USD   Entered By: AWOODMANSEE   Invoice ID: XFTCD4/IC4   Entry Status: Postable   Source: Online	0
Voucher - 45200 L00331742	

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 Results	
> New Search	4
✓ Category	
Vouchers (122607)	
✓ Supplier Name	
DELL MARKETING LP (48352)	
DELL FINANCIAL SERVICES LLC (36641)	
NTT DATA AMERICAS INC (10909)	
DELL MKT LP (6768)	
DELL MKT L P (5663)	
DELL MARKETING (3370)	
DELL MARKETING L.P. (3347)	
DELL MKT CORP (2290)	
DELL COMPUTER CORP (1495)	
DELL MARKETING, L.P. (664)	
More	
∽ Bank Code	
OST (117461)	
∽ Bank SetID	
G 46700 (117461)	
∽ Business Unit	
09000 (28659)	
77000 (11956)	
01000 (8272)	

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 ×	: (
Approval Framework - Vouchers	
Voucher Build Error Detail	
Voucher Build	300 row:
Review Document Status	9
	•

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 Homepage	×
Create a New Homepage Reports	Add
Choose from available homepag	jes

15

Add (new) Homepage setup screen.

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

$\bigtriangledown$			Menu ~ Search in M	lenu			Ū Ü
rts	<b>~</b>						< 5 of 5
	Query Viewer	AP	Statutory Cancellations		Misc Warrants	Payment Exceptions	Withhold Calculation
	ORACLE PEOPLESOFT		PEOPLESOFT		PEOPLESOFT	ORACLE PEOPLESOFT	PEOPLESOFT
	Agency's PO Ref/PO	ePr	o Timeline Report (0905)		Outstanding Pre-Encumbrances	Vouchers Process Against PO	PO Budget Checking Report
	ORACLE PEOPLESOFT		PEOPLESOFT		PEOPLESOFT	ORACLE: PEOPLESOFT	PEOPLESOFT

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.

Cancel	
Add Homepage	
My Homepage	
= Employee Self Service	山
= Customer Contracts	≞
= Credit to Cash Operations	≞
= Reports	

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.

←   ③ ♡	ΟÛ	Ø
Query Viewer	Add To Homepage	
Enter any information you have and click Search. Leave fields blank for a list of all values.	Add To NavBar	e Page
*Search By Query Name v begins with	Add To Favorites	
Search Advanced Search	My Preferences	
	Sign Out	

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 To Homepage $ imes$						
*Tile Label						
Bid Opening Day Report						
Choose from available homepages						
My Homepage						
Reports						
Employee Self Service						
Customer Contracts						
Credit to Cash Operations						
Create a New Homepage						
Add to new Homepage						

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.

Cancel	Personalize Homepage	2 Save
Add Homepage	Common Settings	
= My Homepage	Show Notifications Panel 3	
= Employee Self Service	Selected Homepage Settings	1 Add Tile
= Customer Contracts	Homepage Reports	
= Credit to Cash Operations	Ouer Viewer     AP Statutory Cancellations     Mice Warrants     Payment Eventions     Mitchield	Calculation 📅
Reports		
		:

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.

Cancel	Personalize Homepage Save								
Add Homepage	Add Homepage Settings								
My Homepage	Homepage My Homepage								
= Employee Self Service	Accounts Payable Center	Query Viewer							
= Customer Contracts	Add/Update Requisitions								
Example 2 Credit to Cash Operations									
= Reports		:							
	Regular Entry	Report Manager 🔠							

#### 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.

	Select Action	
Move To		>
Сору То		>

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.

Canc	el	Personalize	Save
Menu	Order		
Alp	habetical	Standard	
NavB	ar Tiles		Ð
=	Recently	/isited	
=	Favorites		
=	Menu		
=	Expenses		Ē
=	My Prefer	ences	Ē
=	Agency In	formation	Ē
=	Query Vie	wer	山
=	Classic H	ome	

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.

Cancel	Personalize	Save						
Menu Order								
Alphabetical	Standard							
NavBar Tiles 🕀								
= Recently	/ Visited							
= Favorite	S							
— Menu								
= Expense	= Expenses							
= My Prefe	erences	匝						
= Agency	Information	≞						
= Query V	iewer	団						
= Classic	Home							

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.

NavBar: Favorites					
G	/ Edit Favorites				
Recently Visited	Billing Interface				
Favoritae	Create/Update Journal Entries				
Pavonies	Express Billing				
Menu	C Ledger Inquiry				
	Process Billing Interface				
Expenses	Process Monitor				
	Query Viewer				
My Preferences	View/Update Item Details				
Classic Home	L	1			

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	×
*Favorite Label	
Query Manager	Add

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.

Select the	Sav	e button after editing or deleting	favorites to apply your changes.	Save	
F	Dele	rites te Selected	1 ro		
		*Favorite	Sequence number	er	
		Query Manager		0	

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.

Select the Sav	e button after editing or deleting favorites to apply y	our changes.	Save
Favo	rites	6 rows	
Dele	te Selected		
	*Favorite	Sequence number	
	Agency Information	1	
	Create/Update Journal Entries	4	
	Manage Purchase Orders	2	
	Query Viewer	3	
	Regular Entry	5	
	Report Manager	6	

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 <u>Remove a tile from the NavBar</u>.

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.

	Unable to load Dashboard EPEX_EXP_HOMEPAGE_FL	
	Please specify a valid Fluid Dashboard name.	
	Error message 1.	
	First operand of . is NULL, so cannot access member BannerTileHandler. PT_FLDASHBOARD.GBL.PostBuild PCPC:2868 Statement:53	
The first operand of the dot operator	is the NULL value, indicating the lack of any object value. As a consequence, the c	given method or property cannot be used.
	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.

My Preferences				
General Settings		General Settings		
		✓ General Options	Restore Defaults	Save
Billing	~	Accessibility Layout Screen reader mode off		
Customer Contracts	~	Customize Page Settings		
	~			
		Save Warning		
	1	V Navigation Personalizations		
		Automatic Menu Collapse		
		Tab over Calendar Button		
		Tab over Grid Tabs		
		Tab over Lookup Button		

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**.

Menu - Classic	
	Expand
Search:	
D CORE Conversion	
D OK Custom Processes	
D OK Workflow	

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.

ſ	Distribution Lines					
I	R Q					
I	Personalize	←	Jdg	jet <u>J</u> ourn	al Reference Information	Distribution C
	Zoom Distribution L	ines ion Lines Table to Excel		GL Unit	Credit Amount	Foreign Currency
				09000	126.00	USD
	1	126.	00	09000		USD

# 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.

	Grid Cus	tomization	
			Help
Distribution Lines			
Personalize Column and Sort	Order		
To order columns or add fields to sort Frozen columns display under every ta	order, highlig ab.	ht column name, then press the appro	priate button.
Column Order		Sort Order	
Tab ChartFields (frozen) Distribution Sequence (frozen) Debit Amount (frozen)		GL Unit (desc)	
GL Unit (frozen) Credit Amount (frozen)	Hidden		Descending
Account			
Oper Unit			
Class-Funding			
Dept			
Program			
Bud Ref			
Sub-Account			
PC Business Unit			
Project			
Activity			
Anaiysis Type			
Source Type (hidden)			
Subsetegony (hidden)			
Affiliate	-		
Fund Affil			

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	C <u>u</u> rrency Details <u>B</u> udg	jet <u>J</u> ourr	nal Reference Information	Distribution Creation	on / Update Details	;
Distribution Sequence	Debit Amount	GL Unit	Credit Amount	Foreign Currency	Account	Oper Unit
		09000	126.00	USD	111200	IS009270
1	126.00	09000		USD	111200	

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.

10. 9	
	ORACLE PeopleSoft
	User ID
	Password
	Select a Language
	English v
	Sign In
	Enable Screen Reader Mode

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

()	$\heartsuit$	$(\hat{r})$	Menu 🗸	Search in Menu	Q		Û	:	Ø
My I	lome	page ~			NATARTISTANIOTASTATION, 1948 MILLION, 1948 MILLION, 1949 MILLION, 1949 MILLION, 1949 MILLION, 1949 MILLION, 194	NavBar	< 1 of :	5 >	:

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

NavBar: Mer	าน		503
()		Accounts Receivable	>
Recently Visited		Allocations	>
$\heartsuit$	в		
Favorites		Background Processes	>
=	D	Banking	>
Menu		Billing	>
E.	с		
Expenses	=	Change My Password	
		Commitment Control	>
My Preferences		CORE Conversion	>
		CORE Interfaces	>
Classic Home		Customer Contracts	>
		Customers	>

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

User ID	SLANGS
Description	Stephanie Brown (090)
*Current Password	•••••
*New Password	•••••
*Confirm Password	•••••
	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.

	152
ORACLE PeopleSoft	
User ID	
Password	
Select a Language	
English	~
Sign In	
Enable Screen Reader Mode	

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

(	$\heartsuit$	$(\mathbf{\hat{s}})$	Menu 🗸	Search in Menu	Q		Û	:	Ø
My H	lome	page ~		And a start of the start of t		NavBar	1 of 5	>	:

• 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.

Chang	ge or set up forgotten password help	×
		Help
If you forget your pass Enter a question and y	word, you can have a new password emailed to you. our response below. These will be used to authenticate you.	
Question	~	
Response	In what city does your nearest sibling live?	
ОК Са	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?	
your routings.	What is your maternal grandmother's maiden name?	
Q	What school did you attend for sixth grade?	
00)	What was the last name of your third grade teacher	
	What was your childhood nickname?	
00)	Which phone number do you remember from childhood?	



- 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.

Email		I
Primary Email Account	Email Type	Email Address
	Business v	noreply@omes.ok.gov

# 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				
<ul> <li>Search Criteria</li> <li>Note: Search will return results</li> <li>Enter any information you have</li> </ul>	last updated 40 days ago (03/18/2025 11:30:41PM). and click Search. Leave fields blank for a list of all va	alues.		
Keywords	Enter keywords here	Search	0	
	$\checkmark$ Show more options			

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

Find an Existing Va	lue						
✓ Search Criteria							
Enter any information you ha	ave and clic	k Search. Leave fie	lds blank for a list of all	values.			
Recent Searches	Choose fr	om recent searche	5	·	Saved Searches	Choose from saved searches	<ul><li>✓</li></ul>
Busi	ness Unit	- •	09000	Q			
Ve	oucher ID	begins with 🗸					
Invoice	e Number	begins with 🗸					
Inv	oice Date	= 🗸		<b>.</b>			
Short Supp	lier Name	begins with 🗸					
SI	upplier ID	begins with 🗸		Q			
Supp	lier Name	begins with 🗸	DELL				
Vouc	her Style:	= ~		•			
Related	l Voucher	begins with 🗸					
Ent	try Status	= 🗸		~			
Vouche	er Source	= 🗸	•	•			
Incomplete	Voucher	= ~		•			
		ewer options ensitive					
		Search	Clear				

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

Find an Existing Value						
✓ Search Criteria						
Enter any information you have and o	lick Search. Leave f	ields blank for a lis	st of all values.			
Recent Searches Choose	from recent search	es	<b>~</b> //	Saved Searches	Choose from saved searches	~ //
Business Un	t = 🗸	09000	Q			
Voucher II	begins with 🗸	]				
Invoice Numbe	r begins with 🗸					
Invoice Dat	= ~		曲			
Short Supplier Nam	e begins with 🗸					
Supplier II	) begins with 🗸	]	Q			
Supplier Nam	e begins with 🗸	DELL				
Voucher Styl	= ~		~			
Related Vouche	r begins with 🗸					
Entry Statu	s = 🗸		~			
Voucher Source	e = 🗸		~			
Incomplete Vouche	r = 🗸		~			
4 Shou	fower options					
Case	- Jensiuve					
	Search	Clear	□ Save Sea	arch		

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

Save Search	×
	Help
Name	
Business Unit 09000	
Supplier Name DELL	
Cancel Save	

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.

Find an Existing Va	lue				
<ul> <li>Search Criteria</li> <li>Enter any information you h</li> </ul>	ave and click Search. Leave fields blank for a l	ist of all values.			
Precent Searches	Choose from recent searches	• /	☐ Saved Searches	Choose from saved searches	~ 0

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

Find an Existing Va	lue				
✓ Search Criteria Enter any information you have	ave and click Search. Leave fields blank for a list o	of all values.			
Precent Searches	Choose from recent searches	~ //	Saved Searches	Şearch	
Busi	ness Unit = 🖌 09000	Q		VCH_DELL Business Unit:09000,Supplier Name:DELL	
M	ucher ID begins with				

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.

Find an Existing Val	ue			
<ul> <li>Search Criteria</li> <li>Enter any information you had</li> </ul>	ve and click Search. Leave fields blank for a list of all values			
Recent Searches	[bearch]	Saved Searches	Choose from saved searches	• /
Busir	Business Unit:09000,Supplier Name:DELL	]		