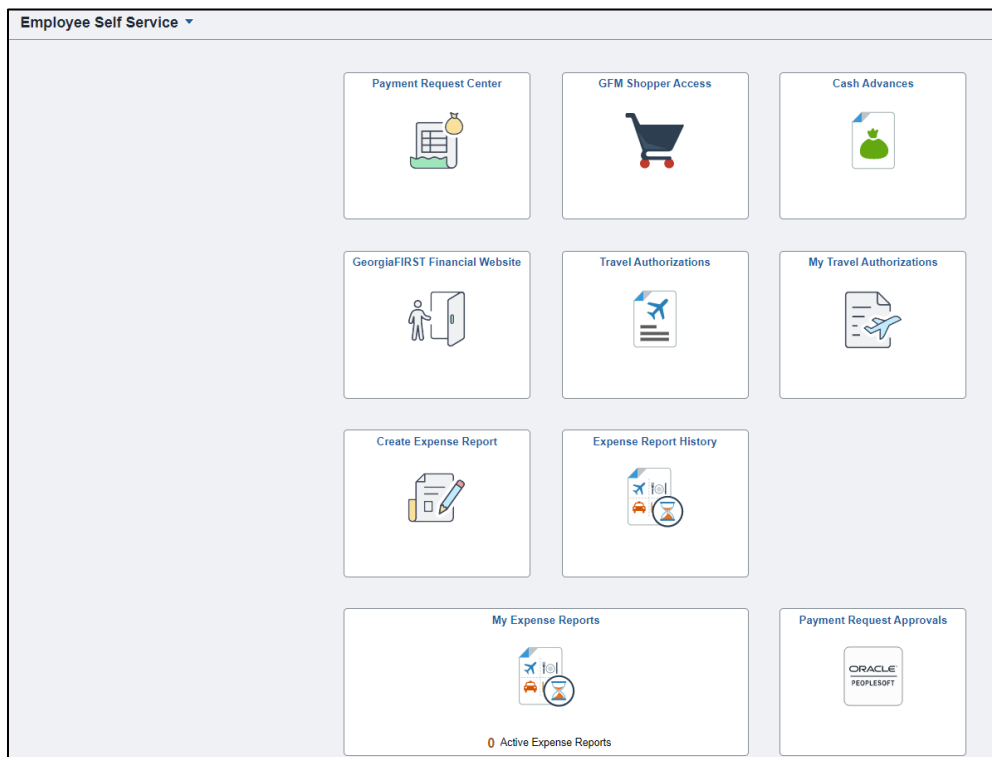# FLUID HOMEPAGES IN PEOPLESOFT FINANCIALS

The Fluid Interface is designed to adapt easily to various devices including mobile phones and tablets. The Fluid homepage pictured below replaces the Classic homepage that displayed the navigation menu on the left side.

Users access the menu previously located on the left side of the homepage from the Navigation Bar (NavBar), located in the top right corner of the page. For more information on how to use the NavBar, see the PeopleSoft Financials Fluid User Interface videos on the GeorgiaFIRST website.

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Homepages by Job Function

Users can view homepages by job function. Each homepage by job function contains default tiles based on that job function. Initially when users log in to Georgia*FIRST* Self Service they land on the Employee Self Service homepage as seen below.
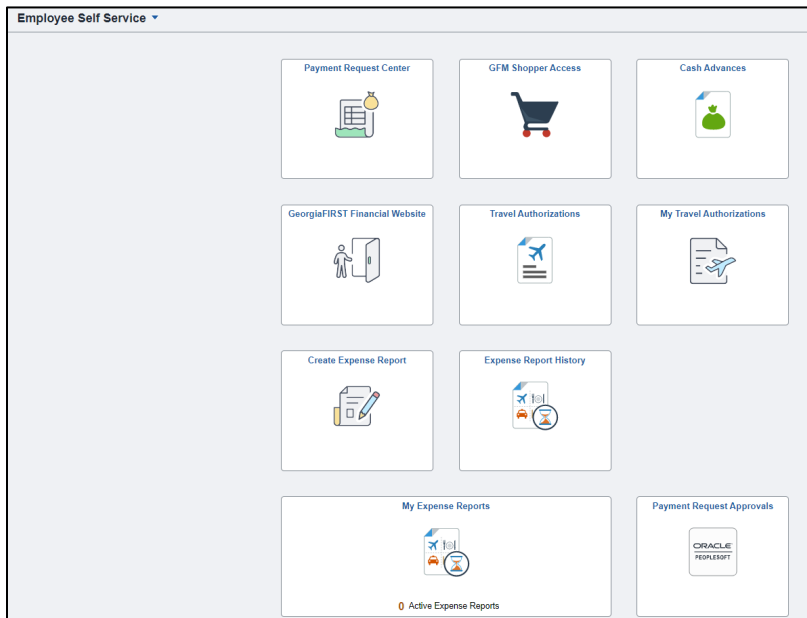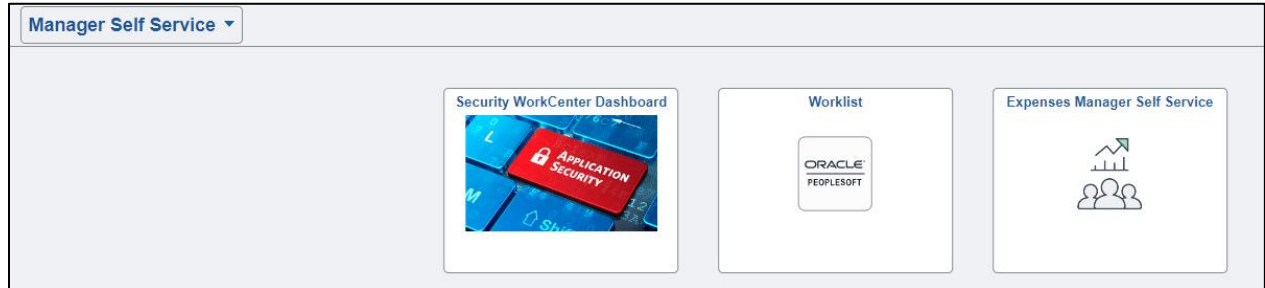

In addition to the Employee Self Service homepage, users can choose from four other homepages by job function as listed below:
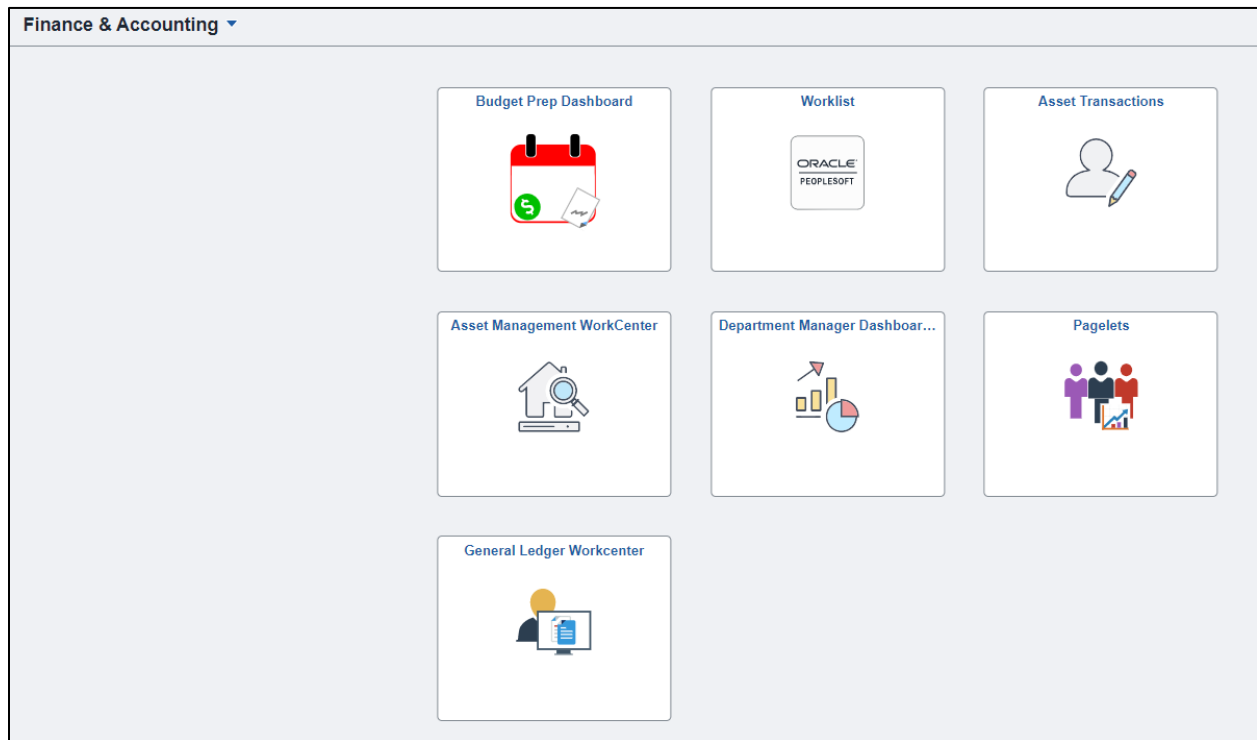
- Manager Self Service
- Finance & Accounting
- eProcurement/Purchasing
- Payables Operations

Note: *homepage access depends on the user's security access and institution's transaction use. If access to a particular homepage is needed, contact the institution's local Security Administrator.*
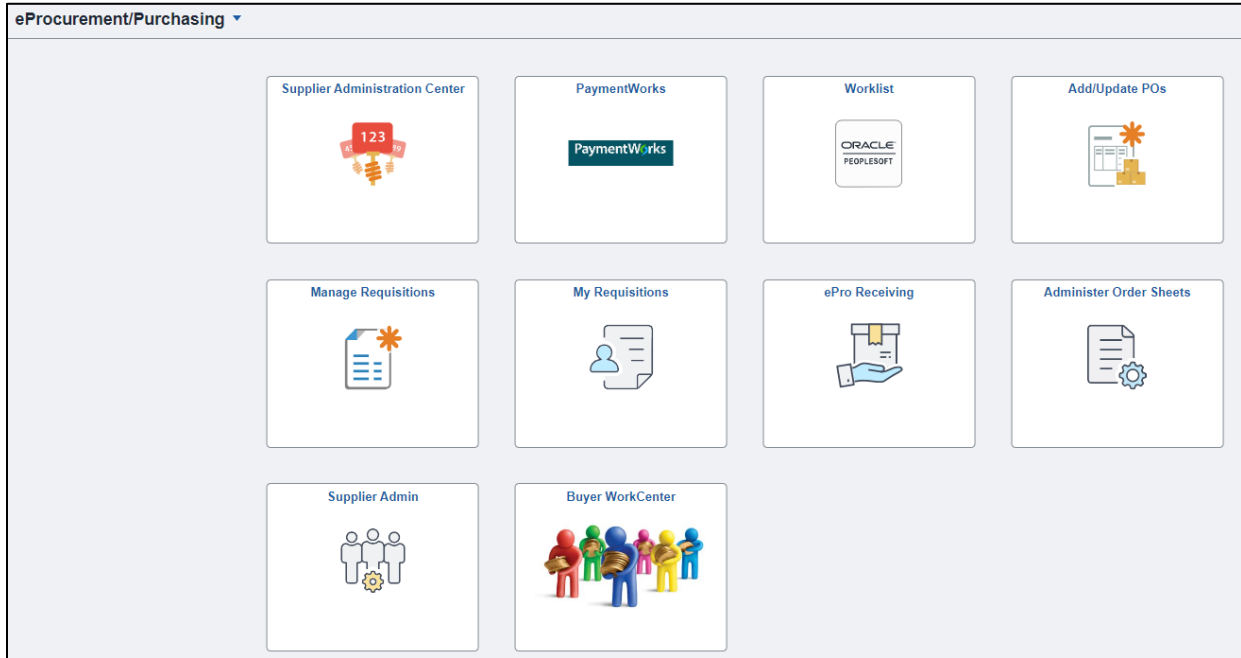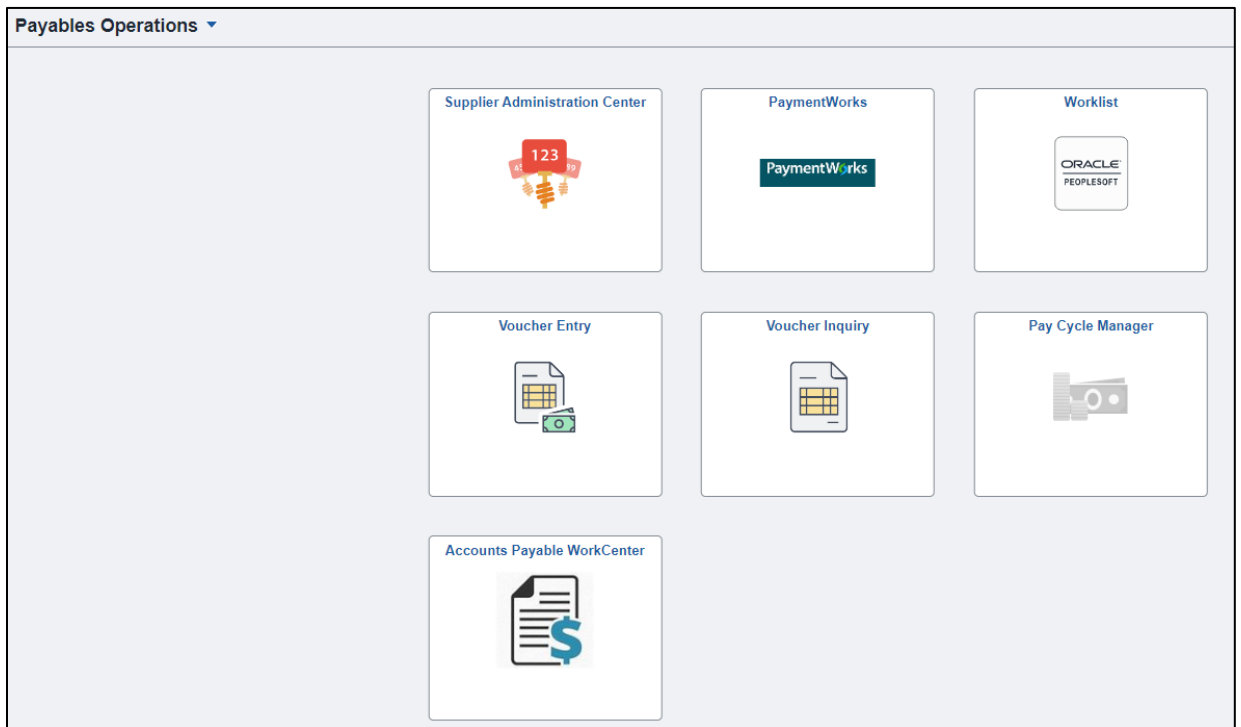
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Manager Self Service Homepage:

Manager Self Service ▾

Security WorkCenter Dashboard	Worklist	Expenses Manager Self Service

Finance & Accounting Homepage:

Finance & Accounting ▾

Budget Prep Dashboard	Worklist	Asset Transactions
Asset Management WorkCenter	Department Manager Dashboar…	Pagelets
General Ledger Workcenter		

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eProcurement/Purchasing Homepage:

eProcurement/Purchasing ▼			
Supplier Administration Center	PaymentWorks	Worklist	Add/Update POs
Manage Requisitions	My Requisitions	ePro Receiving	Administer Order Sheets
Supplier Admin	Buyer WorkCenter		

Payables Operations Homepage:

Payables Operations ▼			
	Supplier Administration Center	PaymentWorks	Worklist
	Voucher Entry	Voucher Inquiry	Pay Cycle Manager
	Accounts Payable WorkCenter		

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To View Default Homepages by Job Function
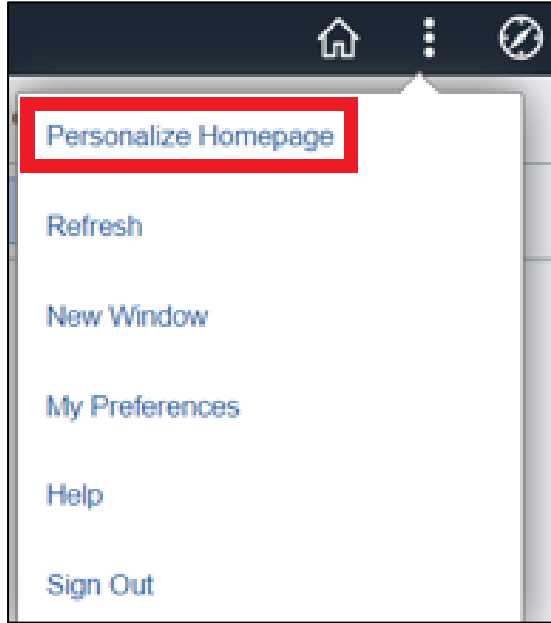
Below are step by step instructions on how to view homepages by job function.

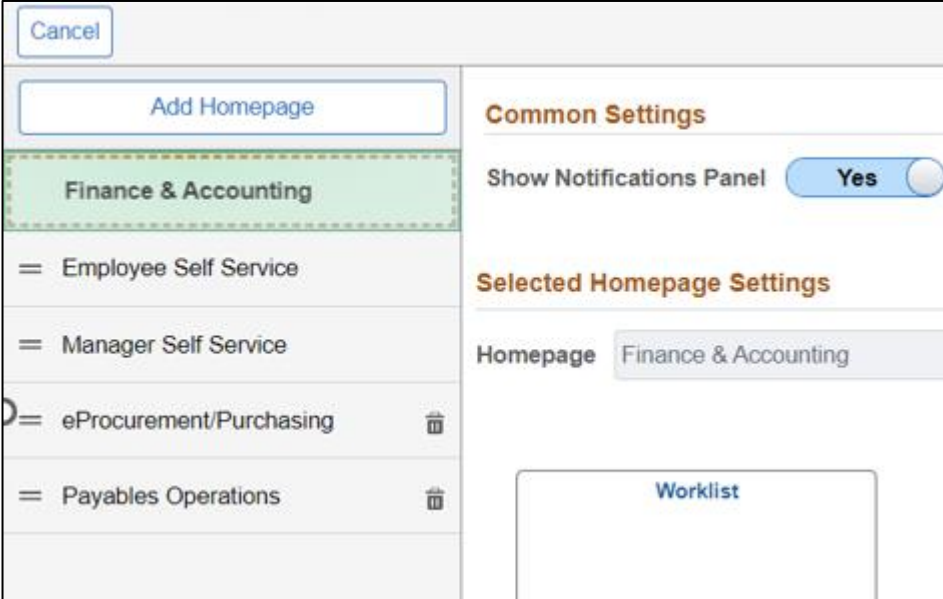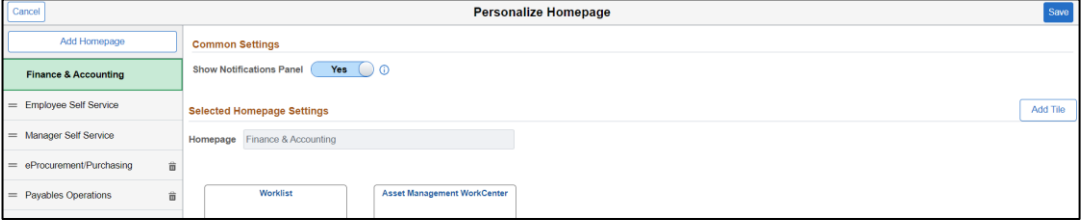| Step	Action
1.	Sign into SelfService.
2.	Click Employee Self Service and a dropdown menu appears as seen below.
3.	Select the homepage by job function to view. The system navigates to that homepage.

To Set Default Homepage by Job Function

Users can change their default homepage from Employee Self Service to other homepage options. Also, users can personalize tiles on each homepage by following instructions on p. 9.

Below are step by step instructions on how to set the homepage from Employee Self Service to another job function homepage.

Step	Action
1.	Sign into Self-Service.
2.	Click the three dots on the right-hand side.
3.	Click Personalize Homepage.
4.	Review the list of homepage options from the menu located on the left-hand side as seen below. Homepage options are as follows: • Employee Self Service • Manager Self Service

Step	Action
	- Finance & Accounting - eProcurement/Purchasing - Payables Operations **Note:** *homepage access depends on the user's security access and institution's transaction use. If access to a particular homepage is needed, contact the institution's local Security Administrator.* Cancel Add Homepage **Employee Self Service** = Manager Self Service = Finance & Accounting 🗑 = eProcurement/Purchasing 🗑 = Payables Operations 🗑 **Common Settings** Show Notifications Panel Yes ⓘ **Selected Homepage Settings** Homepage Employee Self Service **Payment Request Center** **GFM Shopper Access**

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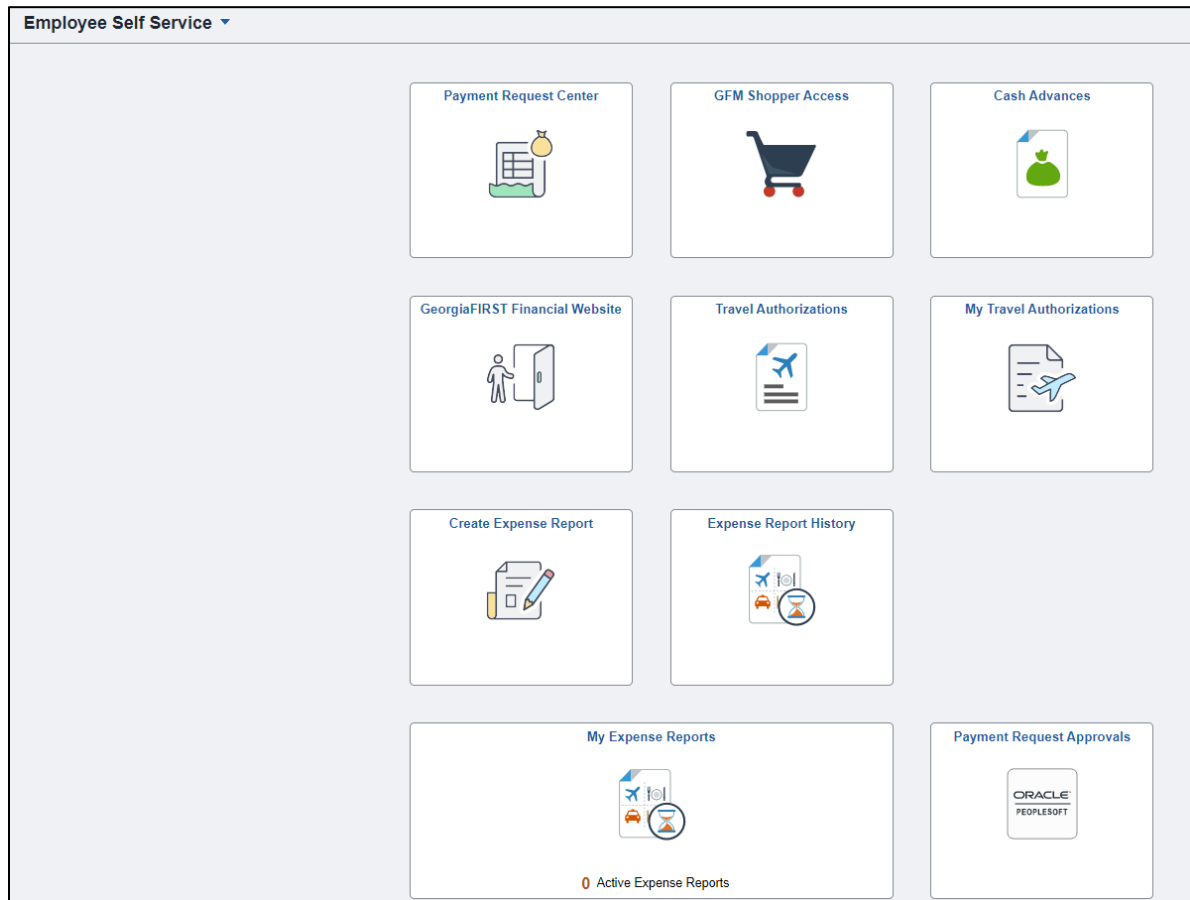
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Step	Action
5.	Select the preferred homepage option from the list. A dashed line appears around the homepage selected as seen below. Drag and drop the preferred homepage to the top of the list. Whichever homepage is listed at the top will be the default homepage when a user logs into Self-Service.

Step	Action
6.	Click the Save button.

Step	Action
7.	Sign out and sign back in to verify the change took effect.

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FLUID HOMEPAGE TILES

Each homepage by job function option contains default tiles. Default tiles provided with each homepage by job function option, as well as descriptions of each tile are below.
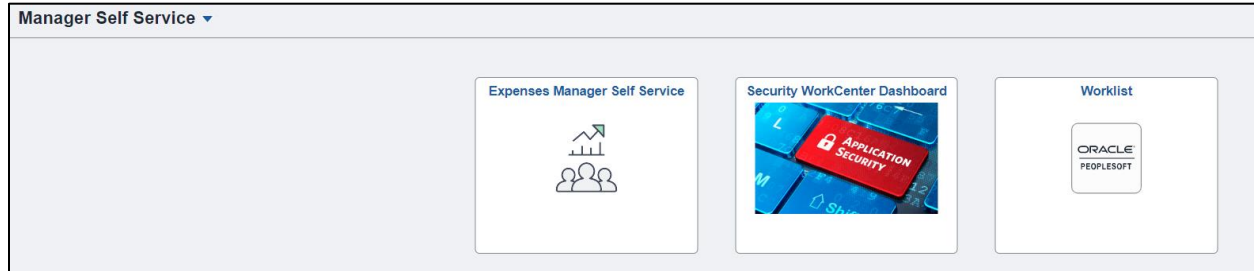
Employee SelfService:

Tile Name	Description
Cash Advances	The Cash Advances tile opens the Cash Advance pages Create/Modify, Print, View and Delete. Selecting one of these options navigate users to the Classic Cash Advance pages. The same options can be accessed by navigating to Employee Self-Service > Travel and Expenses > Cash Advances. ***Note:*** *This tile displays only if the institution uses Cash Advances.*

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Travel Authorizations	The Travel Authorizations tile opens access to all of the Travel Authorization pages Create, Modify, Print, View, Delete and Cancel. Selecting one of these options navigate users to the Classic Travel Authorization pages. The same options can be accessed by navigating to Employee Self-Service > Travel and Expenses > Travel Authorizations. *Note: This tile displays only if the institution uses Travel Authorizations.*
My Travel Authorizations	This tile contains a consolidated list of Travel Authorizations separated by status. Similar information can be obtained by navigating to Employee Self-Service > Travel and Expenses > Travel Authorizations > View. *Note: This tile displays only if the institution uses Travel Authorizations.*
Create Expense Report	Selecting this tile allows a user to create a Fluid expense report for his/her travel or for someone for whom the user is an Authorized Expense User. Creating an expense report using this tile is similar to creating one by navigating to Employee Self-Service > Travel and Expenses > Expense Report > Create. The difference is that, by using the tile, users create the report in the Fluid user interface designed to be used on mobile devices. For information on how to create a Fluid Expense Report using the Create Expense Report tile, see the "Creating and Submitting a Fluid Expense Report" job aid. The same information can be accessed by navigating to Travel and Expenses > Expense Report > Create/Modify

My Expense Reports	Selecting the My Expense Reports tile provides a consolidated view of Expense Reports. This tile contains a list of active Expense Reports: • Returned (Sent Back) • Not Submitted (Created and Saved) • Awaiting Approval (Approvals in Process) • Pending Payment (Approved) status Similar information can be obtained by navigating to Employee Self-Service > Travel and Expenses > Expense Reports > View.
Expense Report History	The Expense Report History tile lists a summary of all Expense Reports in Staged or Paid status. Similar information can be accessed by navigating to Employee Self-Service > Travel and Expenses > Expense Reports > View.
Payment Request Center	Where department users navigate to initiate a payment request. PeopleSoft Payment Request functionality allows users to submit requests to Accounts Payable for the payment of approved Suppliers. Payment Requests route through Approval Process Workflow and, after final approval, Accounts Payable may process them into vouchers using the Voucher Build process. Similar information can be accessed by navigating to Accounts Payable > Payments > Payment Request > Payment Request Center.
Payment Request Approvals.	Where payment request approvers navigate to approve a payment request that has been reassigned to them by the payment request administrator. Similar information can be accessed by navigation to Accounts Payable > Payments > Payment Request >Payment Request Approvals.
Georgia*FIRST* Financial Website	This tile directs users to the homepage on the Georgia*FIRST* Financials website. Users can also access the website by entering this link in the address bar of any browser: http://www.usg.edu/gafirst-fin/.

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GFM Shopper Access	Shoppers can access the Georgia*FIRST* Marketplace from this tile. Requesters should enter the Marketplace through the menu navigation eProcurement > Requisition.

Manager Self Service:
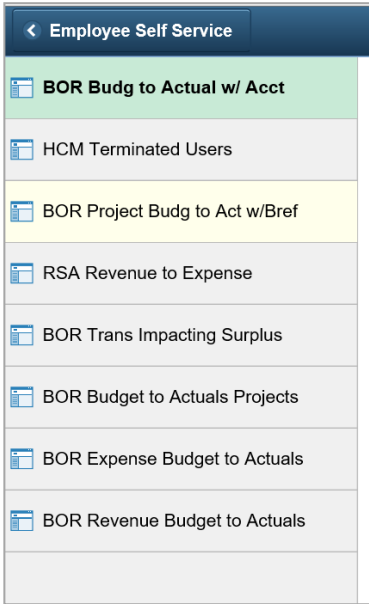
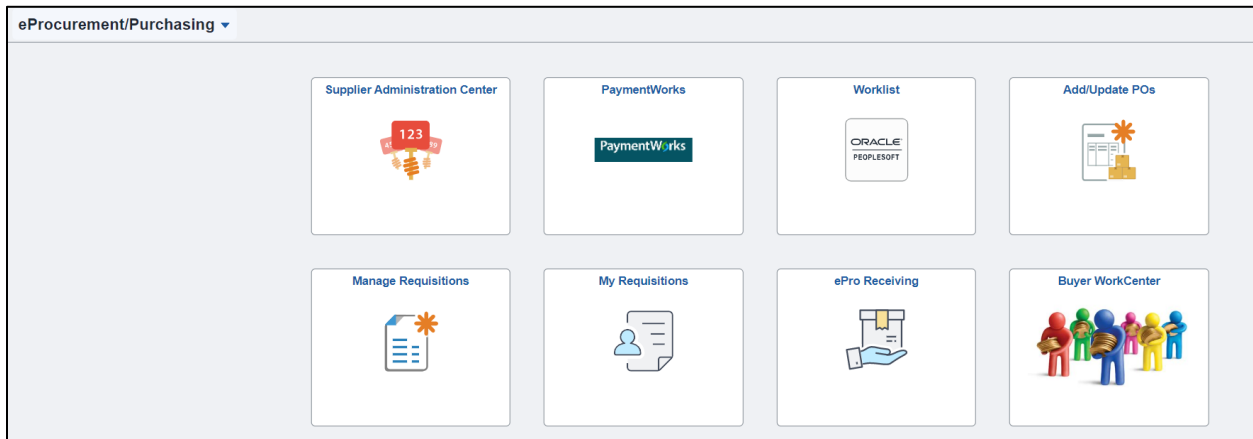| Tile Name	Description
Security WorkCenter Dashboard	Provides a shortcut for users to perform all daily Security Administrator job functions, such as maintain user access and run security queries and processes. Similar information can be obtained by navigating to PeopleTools > Security > Security WorkCenter.
Expenses Manager Self Service	The Expenses Manager Self Service tile provides access to Manage Expenses Security, Print Reports and Approve Transactions, depending on security access. The same options can be accessed by navigating to Manager Self-Service > Travel and Expense Center.
Worklist	The Worklist tile appears on the following homepages: • Finance & Accounting • Manager Self Service • eProcurement/Purchasing • Payables Operations

	When users click on this tile, the system navigates to the Pending Worklist page, where users can select which transaction(s) they would like to approve, deny, pushback or hold. Similar information can be obtained by navigating to Worklist > Worklist.

Finance & Accounting:

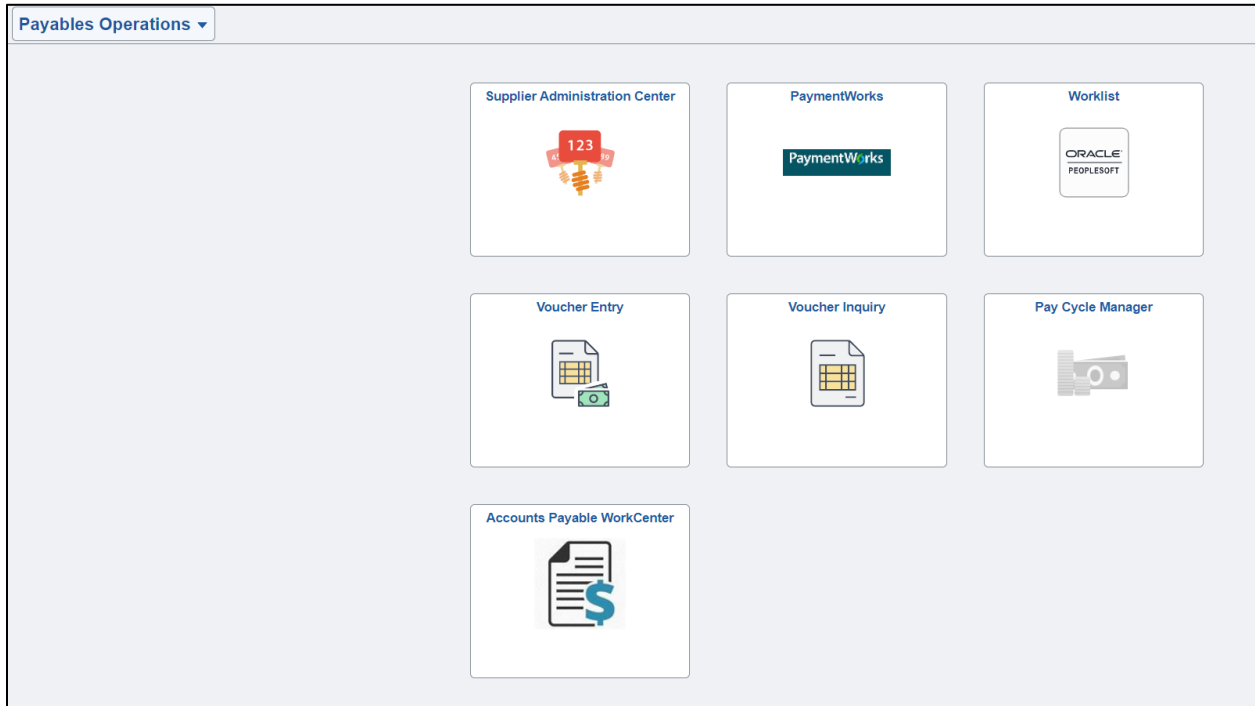| Tile Name	Description
Worklist	The Worklist tile appears on the following homepages: • Finance & Accounting • Manager Self Service • eProcurement/Purchasing • Payables Operations When users click on this tile, the system navigates to the Pending Worklist page, where users can select which transaction(s) they would like to approve, deny, pushback or hold.

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	Similar information can be obtained by navigating to NavBar > Navigator > Worklist > Worklist.
Asset Management WorkCenter	This tile provides a central area for users to access various pages and perform daily tasks without leaving the WorkCenter. Similar information can be accessed by navigating to Asset Management > Asset Management WorkCenter.
Department Manager Dashboard	Allows department managers to view financial data, including budgets, pre-encumbrances, encumbrances, expenses, and the detail behind these numbers in one place. Target users are nontraditional financial users such as faculty and department managers and users that do not have current access to PeopleSoft Financials. Similar information can be accessed by navigating to BOR Menus > BOR General Ledger > Department Manager Expenses or Department Manager Revenue
Pagelets	The Pagelet's tile takes users to a list of all available Pagelets. After clicking on the tile, users then click on the Pagelet to display. **‹ Employee Self Service** BOR Budg to Actual w/ Acct HCM Terminated Users BOR Project Budg to Act w/Bref RSA Revenue to Expense BOR Trans Impacting Surplus BOR Budget to Actuals Projects BOR Expense Budget to Actuals BOR Revenue Budget to Actuals Similar information can be accessed by navigating to BOR Menus > BOR General Ledger > BOR Pagelets

General Ledger WorkCenter	Provides a central area for users to access various pages and perform daily tasks, such as query and report access, create/update journal entries page, and look at current journal exceptions, in one tile. Similar information can be accessed by navigating to General Ledger > GL WorkCenter.

eProcurement/Purchasing:

Tile Name	Description
Worklist	The Worklist tile appears on the following homepages: • Finance & Accounting • Manager Self Service • eProcurement/Purchasing • Payables Operations When users click on this tile, the system navigates to the Pending Worklist page, where users can select which transaction(s) they would like to approve, deny, pushback or hold. Similar information can be obtained by navigating to Worklist > Worklist.

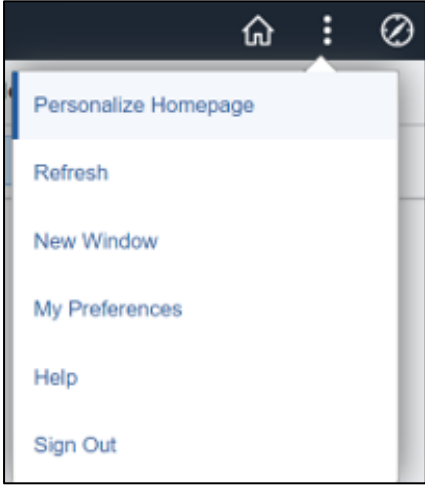|	
Add/Update POs	When users click this tile, the system navigates to Add/Update PO's page. Users can enter a new PO or search for an existing Purchase Order from this page. The same information can be obtained by navigating to Purchasing > Purchase Orders > Add/Update.
Manage Requisitions	When users click this tile, the system navigates to the Manage Requisitions page. Users can perform a variety of functions from this page including search for requisitions, create new requisitions and manage receipts. The same information can be accessed by navigating to eProcurement > Manage Requisitions.
My Requisitions	When users click this tile, the system navigates to the My Requisitions page and returns requisitions for the user based on the criteria defined in the filter. The same information can be accessed by navigating to eProcurement > Manage Requisitions.
ePro Receiving	This tile provides an alternative way to receive items via ePro. The same information can be accessed by navigating to eProcurement > Receive Items or eProcurement > Manage Requisitions > Receive Items for Action list
Buyer WorkCenter	This tile provides a central area for users to access various pages and perform daily tasks without leaving the WorkCenter. The same information can be accessed by navigating to Purchasing > Buyer WorkCenter.

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Payables Operations:

Payables Operations ▼	

Supplier Administration Center

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PaymentWorks

PaymentWorks

Worklist

ORACLE
PEOPLESOFT

Voucher Entry

Voucher Inquiry

Pay Cycle Manager

Accounts Payable WorkCenter

$

Tile Name	Description
Voucher Entry	When users click this tile, the system navigates to the Add/Update Vouchers page. Users can enter a new Voucher or search for an existing Voucher from this page.

The same information can be accessed by navigating to Accounts Payable > Voucher > Add/Update > Regular Entry |
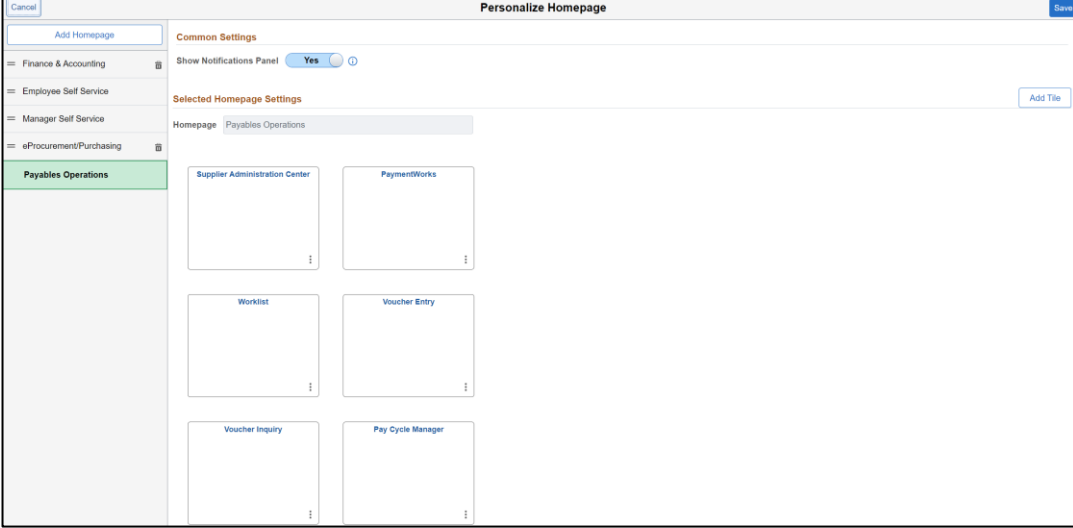
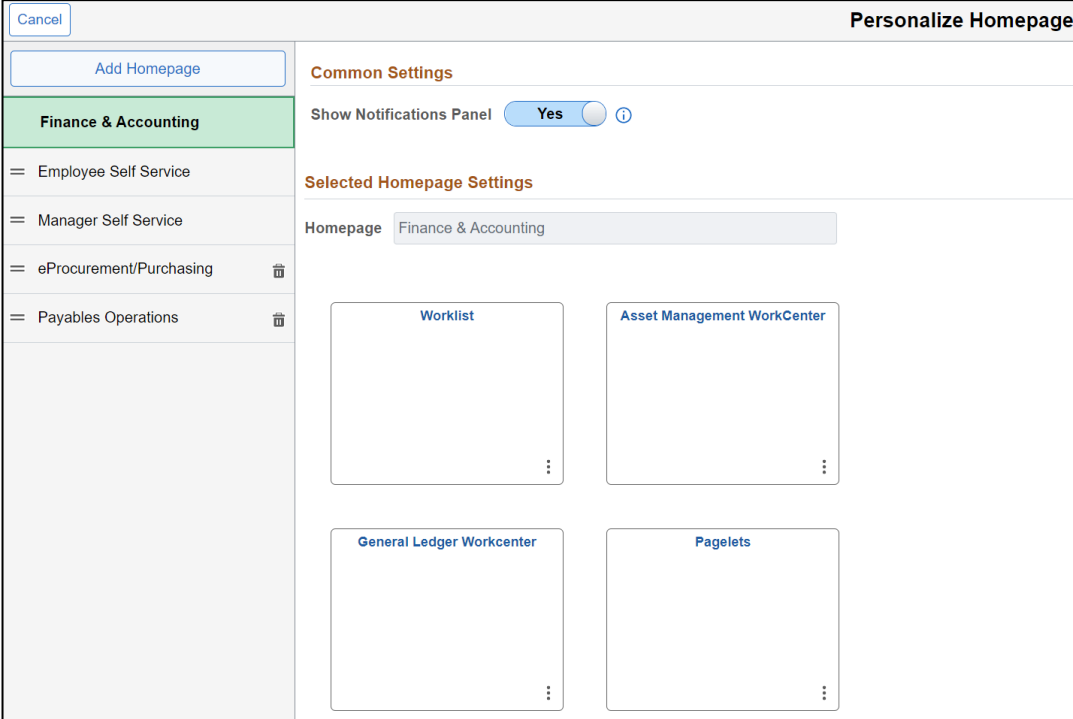|	
Worklist	The Worklist tile appears on the following homepages: • Finance & Accounting • Manager Self Service • eProcurement/Purchasing • Payables Operations When users click on this tile, the system navigates to the Pending Worklist page, where users can select which transaction(s) they would like to approve, deny, pushback or hold. The same information can be obtained by navigating to Worklist > Worklist.
Voucher Inquiry	When users click this tile, the system navigates to the Voucher Inquiry page. The same information can be accessed by navigating to Accounts Payable > Review Accounts Payable Information > Vouchers > Voucher.
Pay Cycle Manager	When users click this tile, the system navigates to the Pay Cycle Manager page. The same information can be accessed by navigating to Accounts Payable > Payments > Pay Cycle Processing > Pay Cycle Manager
Accounts Payable WorkCenter	When users click this tile, the system navigates to the Accounts Payables WorkCenter which provides a central area for users to access various pages and perform daily tasks in one location. The same information can be accessed by navigating to Accounts Payable > Accounts Payable WorkCenter

To Personalize Homepage Tiles

Additionally, each user can personalize her/his homepage tiles as needed. Below are step by step instructions on how to add and remove tiles from a homepage.

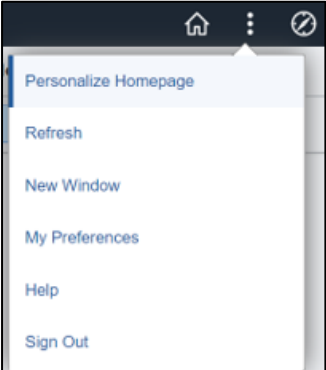Below are step by step instructions on how to add a tile to a homepage.

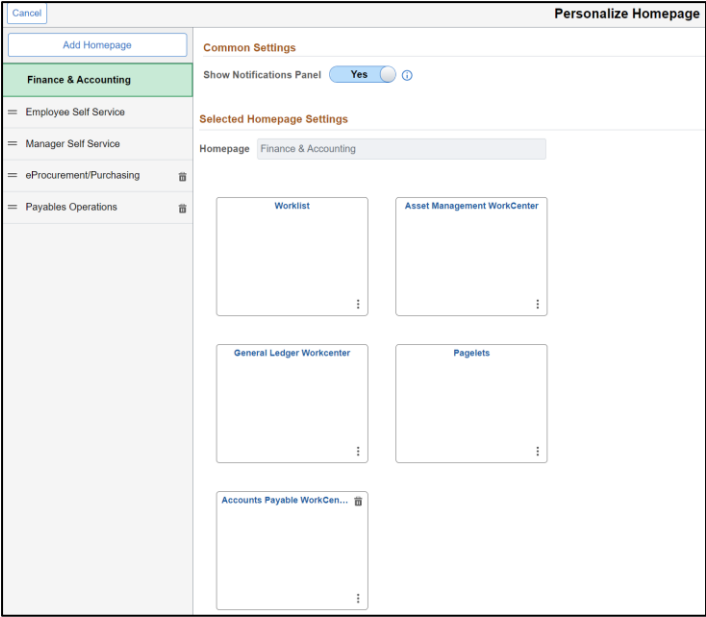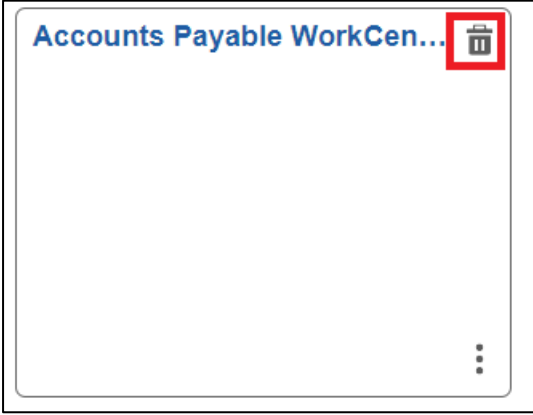| Step	Action
1.	Sign into Self-Service.
2.	Click the three dots at the top right hand.
3.	Click Personalize Homepage.

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Step	Action
4.	The system navigates to the Personalize Homepage page where users can view tiles on the current homepage.

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Step	Action
5.	Click on the homepage option on the left-hand side menu to modify a particular homepage. In the example below, the user selected the Finance & Accounting homepage to modify.
6.	Click the Add Tile button on the right-hand side.

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Step	Action
7.	The Add Tile popup window appears. Select area to drill down into tile options. **Add Tile** ✕ **Search a Tile** [Tile name, tile category, or tile keyword] → **Choose an Existing Tile** Configuration Specialist › Configuration Specialist- EC › FSCM Navigation Collections › PeopleSoft Applications › Update Manager ›
8.	The system generates tiles available under that area. Click on the tile to add to the homepage. ***Note:*** *tile access depends on the user's security access and institution's transaction use. If access to a particular tile is needed, contact the institution's local Security Administrator.*
9.	The Add Tile popup window disappears and the tile selected now appears on the Personalize Homepage page.
10.	Click the Save button. The system navigates back to the homepage. **Personalize Homepage** [Save] [Add Tile]

Below are step by step instructions on how to remove tiles from a homepage.

Step	Action
1.	Sign into Self-Service.
2.	Click the three dots at the top right hand
3.	Click Personalize Homepage.

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Step	Action
4.	The system navigates to the Personalize Homepage page. Click on the homepage by job function option on the left-hand side to modify a homepage. In the example below, the user selected the Finance & Accounting homepage to modify.
5.	The system displays all tiles currently on that homepage. Click the trashcan icon on the tile to remove. *Note: Not all tiles can be removed from the homepage. If a tile can be removed a trashcan icon will appear at the top right hand corner.*