

## Finance Fluid Icons Quick Reference Guide

#### Effective Date: January 21, 2023

## Finance Fluid Icons

Purpose:	This quick reference guide shows you what the various icons are used for in the new PeopleSoft Fluid user interface.
	PeopleSoft has moved away from the classic cascading menu and all modules will appear in Fluid format, just like HCM (i.e., the HR Module).
Audience:	All University of Calgary users that use PeopleSoft FSCM (Finance and Supply Chain Management) to complete their daily tasks.

There are many Icons found on the Fluid page and we will review what each does here.

Navigate to the Employee Self Service home page (my.ucalgary.ca -> All about me -> My info -> Employee Self Service).

On Left hand side there is a <u>Home Page Selector</u>. Click on the drop-down arrow to see which Homepages you can access; this will vary based on the security access you have been granted.





## Finance Fluid Icons Quick Reference Guide

### On left hand side of the page there are two icons:



**Favorites** - This icon is used to access the Favorites you have saved. Please note any Favorite that you currently have saved in the Classic menu will appear when you use the new Fluid User Interface.

On the top right of your screen, you will see three icons.



Here is what each can do for you:



Home Icon - This will return you to the default Homepage which is typically the Employee Self Service Home Page.



Kabob Icon - This allows you to access additional functions.

Questions? UService



## Quick Reference Guide

Please Note: The Kabob will display different choices depending on what page you are on. If you are on a Homepage, these choices will show:



If you are in a Navigation Collection you will see these choices:



The magnifying glass will only show when in the Navigation Collection. It will open the Search Box.



Questions? UService



## Quick Reference Guide

In that Search Box, selecting Help will take you to the Training and Development page – Finance Admin Tasks, which will provide you additional information if required.

← → C @		·····				
			Search UCalgary	a 🗸		
	HUMAN RESOURCES					
	Benefits & Pension 🗸 Work & Comp	pensation V Learning & Development V	Hiring & Managing 💙 Campus Culture 👻 We	ellness 👻 About Us		
	Finance Adr	min Tasks				
	Finance Admin Ta These resources from Training and De	ISKS with Training and velopment will support you through finance pro	Development resses.			
	Finance Admin Ta These resources from Training and De In This Section	ISKS with Training and	Development resses			
	Finance Admin Ta These resources from Training and De In This Section Expense	ISKS with Training and webpenett will support you through finance pro	Development resses			
	Finance Admin Ta Trese resources from Training and De In This Section Expanse Cash Advances	ISKS with Training and wetopment will support you through finance pro Suppliers (individuel/Business). Accounts Receivable (Cesh & Billing).	Development resses			
	Finance Admin Ta Trese resources from Training and De In This Section Expanse Cash Advances Purchasing Regulation, ePro	ISKS with Training and wetopment will support you through finance pro Suppliers (individual/Business) Accounts Receivable (Cash & Billing) Approving Financial Transactions	Development			
	Finance Admin Ta These resources from Training and De In This Section Expanse Cash Advances, Purchasing Regulation, ePro Peyment Processing, Roger Call Phore	Sks with Training and welepment will support you through finance pro Suppliers (Individual/Business), Accounts Receivable (Cash & Billing), Approving Financial Transactions Kofax Scenning	Development 			



Compass Icon- This icon allows you to access the Nav Bar.



Here you can access Recently Visited, Favourites and the Menu.



## Finance Fluid Icons Quick Reference Guide

#### **Opening a New Window**

If you are in a Navigation Collection and want a new window to be opened there are two options:

- 1. At the top of the page, you can click <u>New Window.</u>
- A This will open a new window for you, however, please note that you will no longer have the Navigation Collection on the left side of your screen.

In the New Window, your Kabob action list changes.

⊎ ≡ UofC PS Environments × ♥ MyUCalgary - Staff × ♥ Quick Customer Create × ♥ Quick Customer Create × +				$\sim$
< -> C 🙆 C A == https://sidev1.my.usdgamy.ca/psp/bdev1_11/EMPLOYEE/ERP/r/MAINTAIN_CUSTOMERS.QUICK_CUST_CREATE.GBL?Backbonav=1	☆	$\odot$	ii\ 🗊	Ξ
Test Environment: FSDEV1 High				
Quick Customer Create		<u>ଲ</u>		$\otimes$
Customer Search	Add To Favorit	es		e Page
SetID SHARE Q	Sign Out			

▲ If you are done with this window but have more tasks to complete - DO NOT click Sign out (under your Kabob) or you will be signed out of PeopleSoft. Instead, to close this new window, simply close the tab.

<u>File Edit View History B</u> ookmarks	bols <u>H</u> elp
🗉 🗮 UofC PS Environments	× 🕏 MyUCalgary - Staff × 🕏 Quick Customer Create × 🕏 Quick Customer Create +
$\leftarrow$ $\rightarrow$ C $\textcircled{a}$	C A 🔤 https://fsdev1.my.ucalgary.ca/psp/fsdev1_11/EMPLOYEE/ERP/c/MAINTAIN_CUSTOMERS.QUICKT_CREATE.GBL?&ski
	Test Environment. SDEV1 Hide
	Quick Customer Create
Customer Search	
Customer Search	

2. You can also open a New Window using the link in the Kabob.

Using this link, a New Window will open but maintain the Navigation Collection on the left side of your screen.

Eile Edit View Higtory Bookmarks Tool	s <u>H</u> elp			
UofC PS Environments	🗙 🦁 MyUCalgary - Staff 🛛 🗙 🏮 Quick C	Customer Create × PQuick Customer Create × +		~
$\leftarrow \rightarrow$ C C	O A ē <sup>a</sup> https://fsdev1.my. <b>ucalgary.ca</b> /psc/f	fsdev1_12/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS	=TEMPLATE_ID%3aPTPPNAVCOL&scname=EP_BILLING&PanelCollapsible = 🟠	⊘ III\ ED =
		Test Environment: FSDEV1 Hide		
		Billing		ଜ ୍ : ⊘
🍦 Customers	~		New Window	Help   Personalize Pag
	Customer Search			
Quick Customer Create	SetID	SHARE Q		
General Information	Contact Name			
Update Conversations	User ID			
Contact Information	Email ID			
Pilling Invoices	Contact Telephone			
C Dining involces	Credit Card Number			
Roject Costing	V Customer Name			
interface Transactions	Customer ID			
🧠 Review Billing	✓ II Customer Phone			
Reporting	Country	٩		
	Address 1			
	Address 2			
	City			
	Province			



# Finance Fluid Icons

# Quick Reference Guide

#### To close this new window, simply close the tab.

$\leftarrow \rightarrow$ C $\textcircled{a}$	O A ē <sup>∞</sup> https://fsc	dev1.my. <b>ucalgary.ca</b> /psp/fsdev1_11/EMF		REATE.GBL?&skip
			Test Environment: <sup>-</sup> SI	DEV1 <u>Hide</u>
			Quick Custom	Create

#### Home Page Name

On the left-hand side of your screen, if you see a Home Page name preceded by a back arrow, clicking this will take you back to that Home Page eg. Finance and Accounting.

File Edit View History Bookmarks Tools h	in .		
Image: International state         Image: International state <t< th=""><th>▼ MyUCalgary - Staff X      Quick Customer Create X +</th><th>-</th><th>~</th></t<>	▼ MyUCalgary - Staff X      Quick Customer Create X +	-	~
$\leftarrow$ $\rightarrow$ C $\textcircled{a}$	🖞 🖶 🛤 https://sidev1.my.ucalgary.ca/psc/bdev1/EMPLOYEE/ERP/c/NUL_FRAMEWORK/FT_AGSTARTPAGE_NULGBLICONTEXTIDPARAMS=TEMPLATE_ID%3aPTPPNAVCOL&cname=EP_BILLING&PanelCollapsible=Y6: 🏠	⊗ lii\	. =
	Test Environment: FSDEV1 Hide		
Finance and Accounting	Billing	<u>ଲ</u>	Ø
🍦 Customers	New Winc	low   Help   Person	nalize Page
Quick Customer Create	Customer Search SettD [SHARE Q.]		