

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.

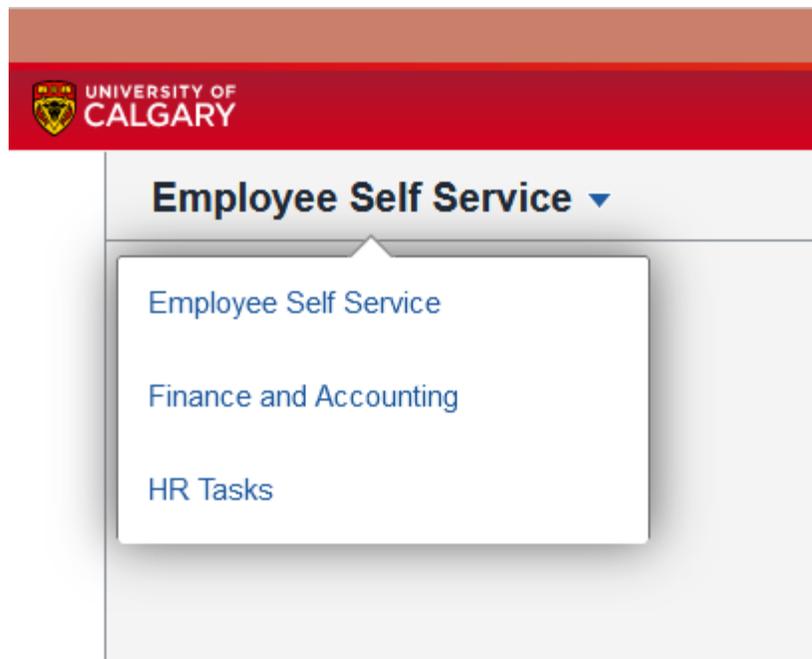
PeopleSoft has moved away from the classic cascading menu and all modules will appear in Fluid format, just like HCM (i.e., the HR Module).

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).

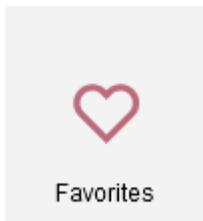
On Left hand side there is a **Home Page Selector**. Click on the drop-down arrow to see which Homepages you can access; this will vary based on the security access you have been granted.



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



Recently Visited - Use this icon to see the menu items you have recently accessed.



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:



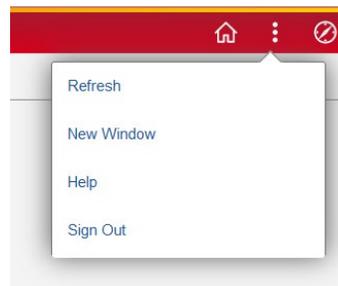
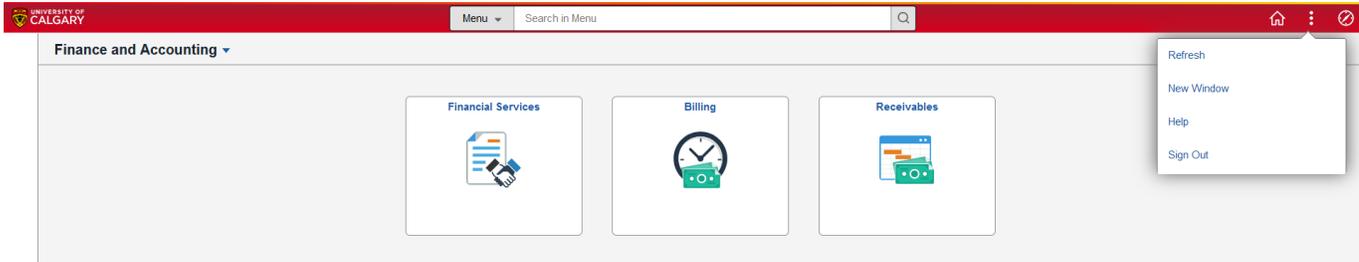
Home Icon - This will return you to the default Homepage which is typically the Employee Self Service Home Page.



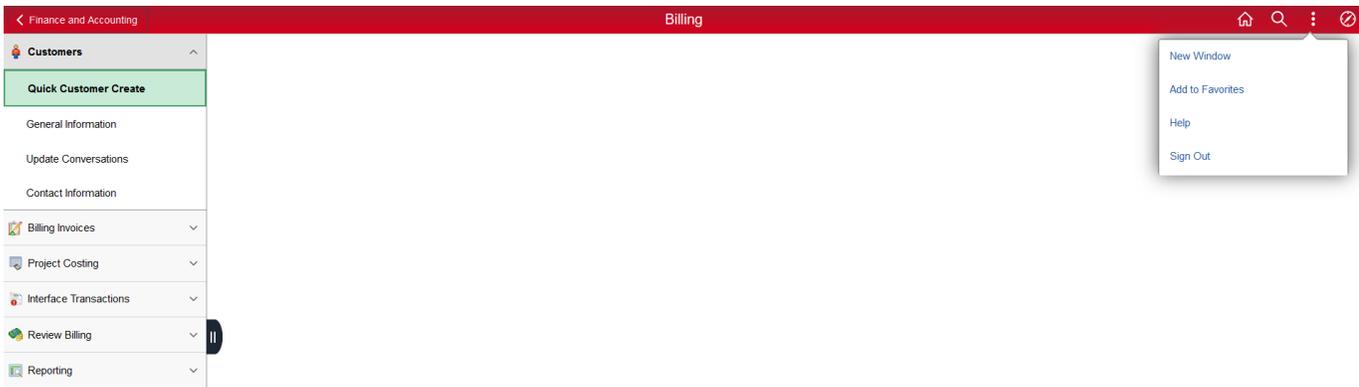
Kabob Icon - This allows you to access additional functions.

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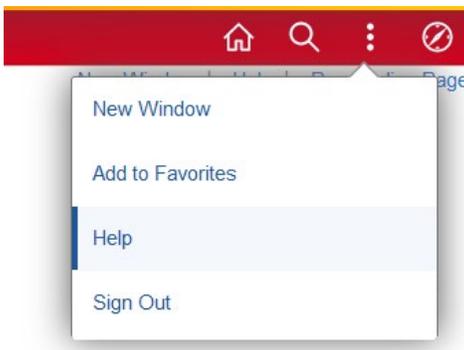
Please Note: The Kabob will display different choices depending on what page you are on. If you are on a Homepage, these choices will show:



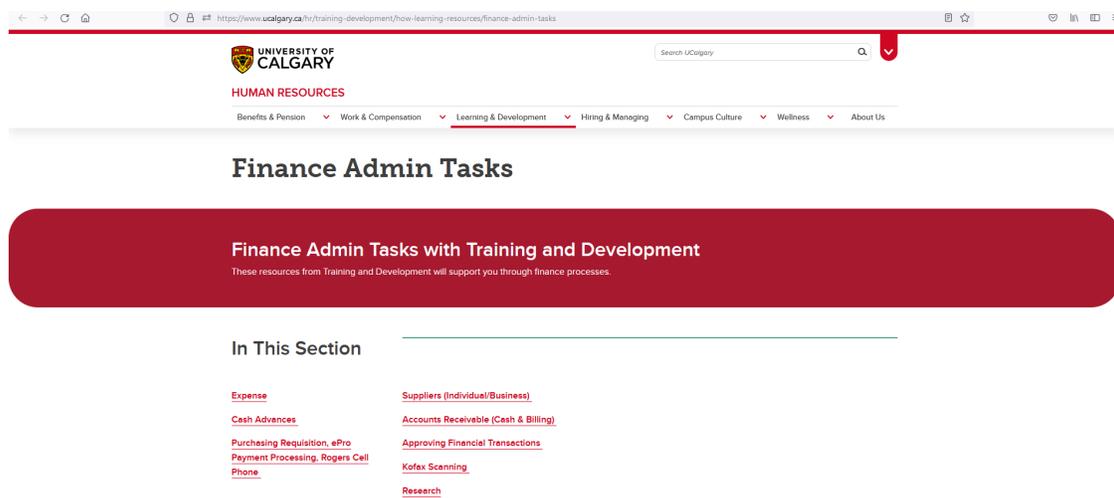
If you are in a Navigation Collection you will see these choices:



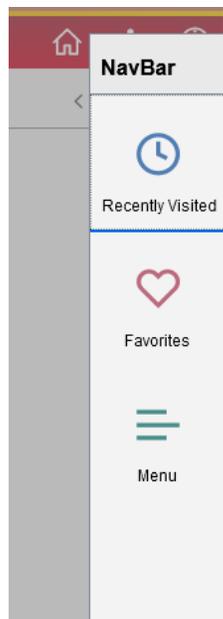
The magnifying glass will only show when in the Navigation Collection. It will open the Search Box.



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.



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



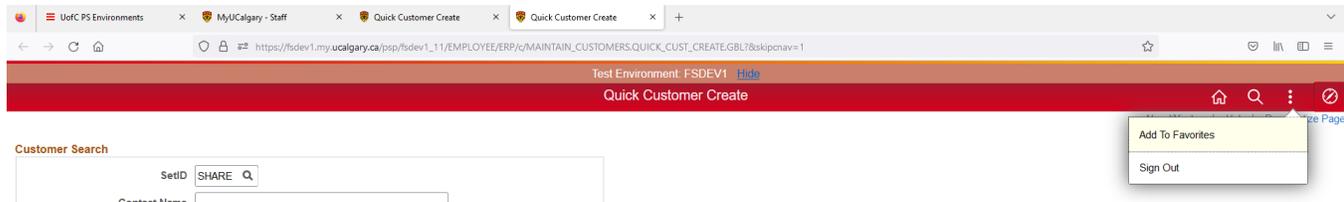
Here you can access Recently Visited, Favourites and the Menu.

Opening a New Window

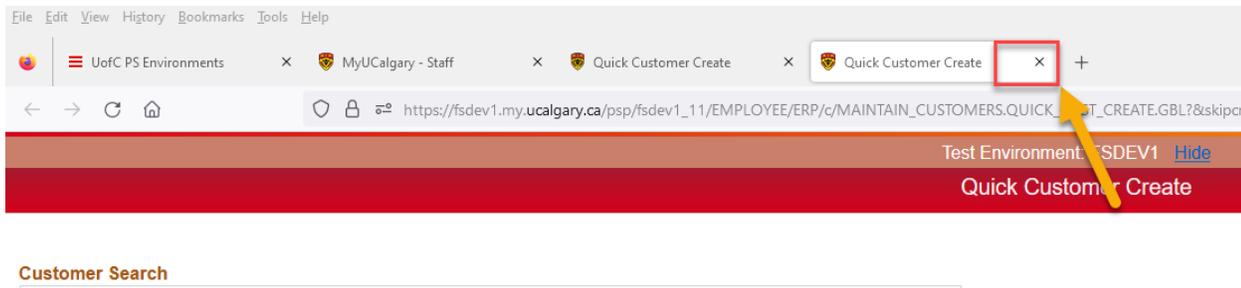
If you are in a Navigation Collection and want a new window to be opened there are two options:

1. At the top of the page, you can click [New Window](#).
 ⚠️ 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.

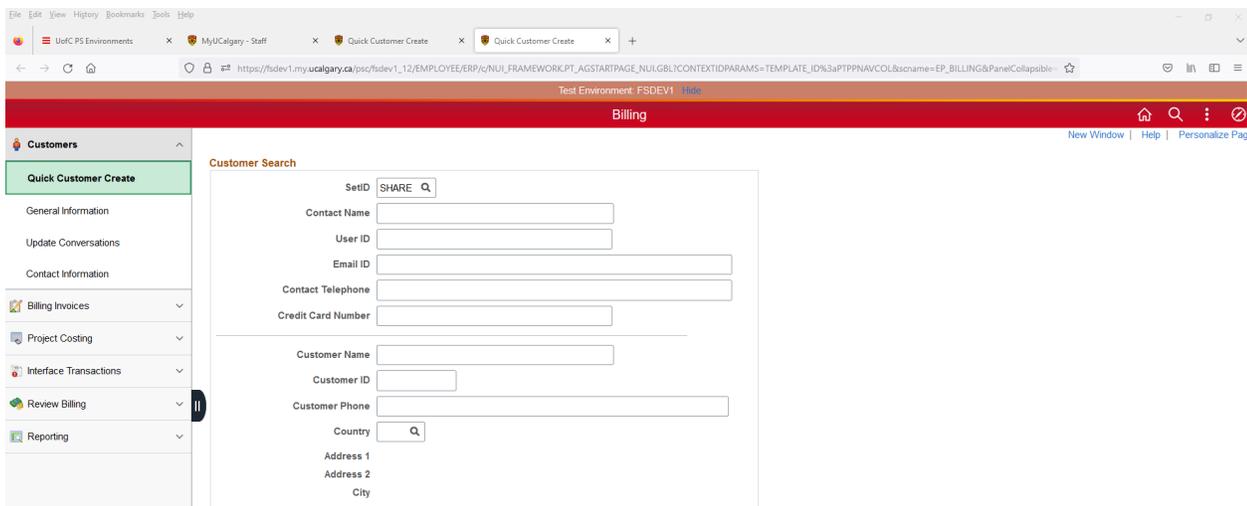


- ⚠️ If you are done with this window but have more tasks to complete - DO NOT click Sign out (under your Kabob) or you will be signed out of PeopleSoft. Instead, to close this new window, simply close the tab.

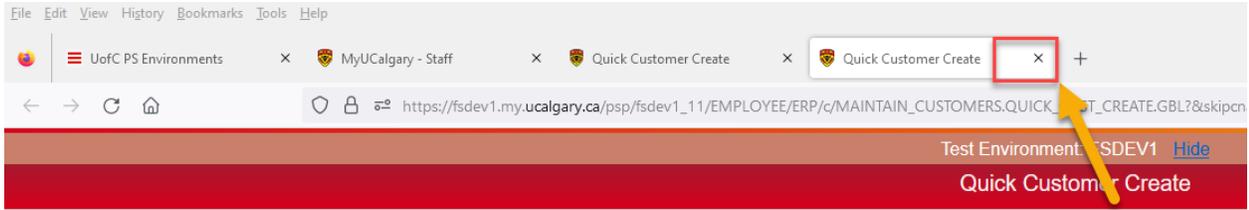


2. You can also open a New Window using the link in the Kabob.

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



To close this new window, simply close the tab.



Customer Search

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.

