

Fluid Navigation for Non-Finance Users

Quick Reference Guide

Effective January 21, 2023

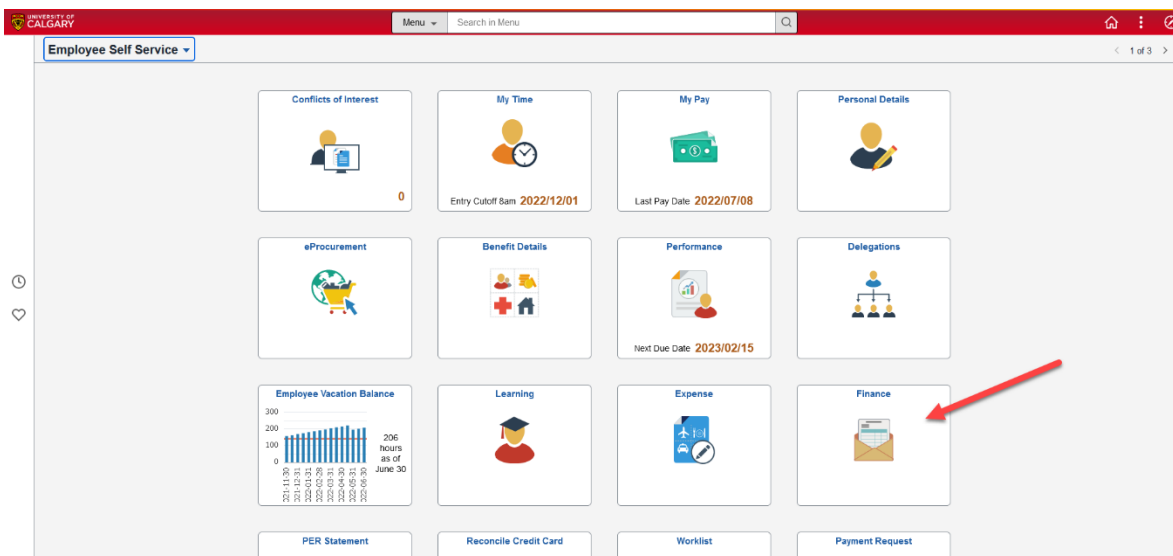
Fluid Navigation for Non-Finance Users

Purpose: This quick reference guide shows you how to navigate FSCM (Finance and Supply Chain Management) functions in the new fluid user interface.

PeopleSoft has moved away from the Classic Cascading Menu and all applications will be Fluid, just like HCM (ie. The HR module).

Audience: All University of Calgary users who are outside of the Finance Business Unit and use PeopleSoft FSCM to complete some of their daily tasks.

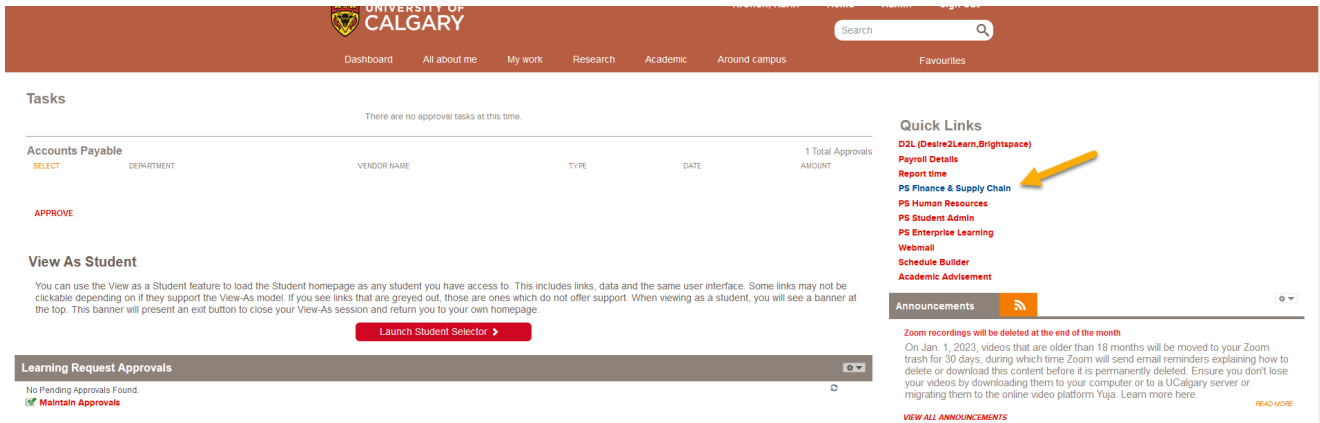
FSCM will be moving from the Classic Menu to Fluid User Interface. This will mean the cascading menu will be replaced by Homepages and Tiles.



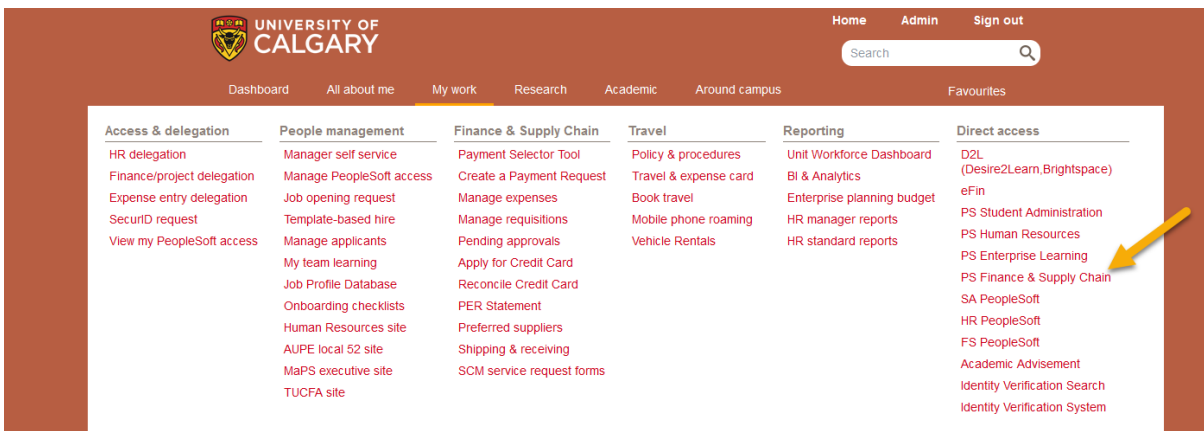
Fluid Navigation for Non-Finance Users

Quick Reference Guide

The way you log in to FSCM (Quick Links or Direct Access) will not change.



The screenshot shows the top navigation bar with links for Dashboard, All about me, My work, Research, Academic, Around campus, and Favourites. Below this, there are sections for Tasks, Accounts Payable (with a table), View As Student, Learning Request Approvals, and a Quick Links sidebar. A yellow arrow points to the 'PS Finance & Supply Chain' link in the Quick Links sidebar.

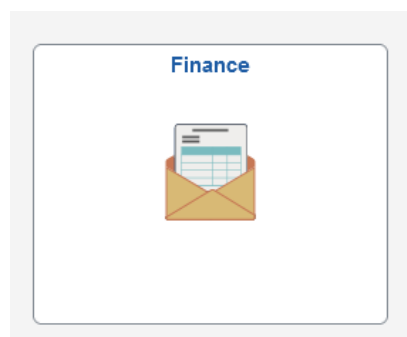


This screenshot shows a grid of direct access links under the heading 'Direct access'. A yellow arrow points to the 'PS Finance & Supply Chain' link in this grid.

Access & delegation	People management	Finance & Supply Chain	Travel	Reporting	Direct access
HR delegation	Manager self service	Payment Selector Tool	Policy & procedures	Unit Workforce Dashboard	D2L (Desire2Learn, Brightspace)
Finance/project delegation	Manage PeopleSoft access	Create a Payment Request	Travel & expense card	BI & Analytics	eFin
Expense entry delegation	Job opening request	Manage expenses	Book travel	Enterprise planning budget	PS Student Administration
SecurID request	Template-based hire	Manage requisitions	Mobile phone roaming	HR manager reports	PS Human Resources
View my PeopleSoft access	Manage applicants	Pending approvals	Vehicle Rentals	HR standard reports	PS Enterprise Learning
	My team learning	Apply for Credit Card			PS Finance & Supply Chain
	Job Profile Database	Reconcile Credit Card			SA PeopleSoft
	Onboarding checklists	PER Statement			HR PeopleSoft
	Human Resources site	Preferred suppliers			FS PeopleSoft
	AUPE local 52 site	Shipping & receiving			Academic Advisement
	MaPS executive site	SCM service request forms			Identity Verification Search
	TUCFA site				Identity Verification System

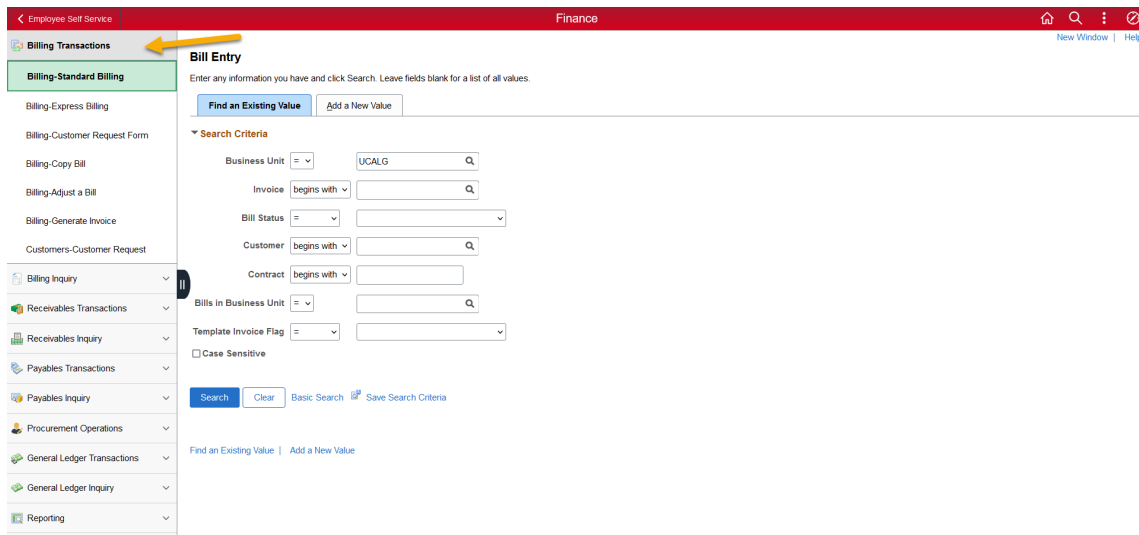
The access that you currently have will also not change; the functions and pages you can access today will be the same when we implement the Fluid User interface.

For all Non-Finance Business Unit users who complete transactions or inquiries in FSCM, you will use the Finance Tile on the Employee Self Service Home Page



Fluid Navigation for Non-Finance Users

Quick Reference Guide

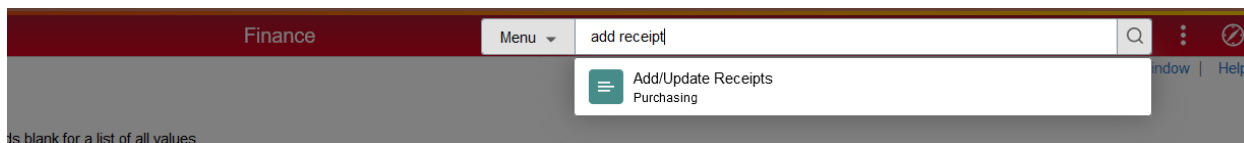


This tile will provide you access to Transactions and Inquiry for Billing, Receivables, Accounts Payable, Procurement Operations, General Ledger, and Reporting such as Queries and eFin. Select the menu item in the Navigation Collection on the left-hand side to display the task available to you.

FAQ: What if my task is not in the list on the left-hand side of my screen?

Answer: If you are unable to find your desired task in the list of items in the Navigation Collection you can use the Search or Menu functions:

1. Click the magnifying glass on the right-hand side and enter the task you are looking for:



Or,

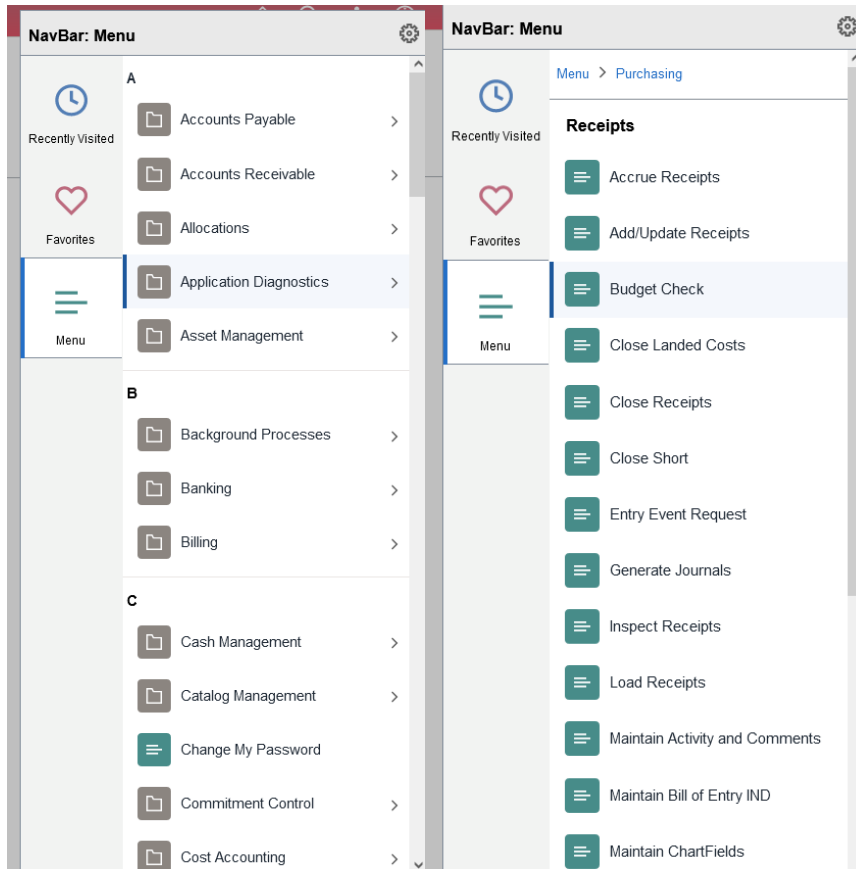
2. Click the compass at the top right of your screen and then select Menu.



Fluid Navigation for Non-Finance Users

Quick Reference Guide

The menu is organized alphabetically and will display additional items like in the previous Classic cascading menu.



When you are done, you can click the Employee Self Service link to return to the Homepage or you can select the Home icon at the top right of your screen to return to the Employee Self Service Home page.



From the Employee Self Service Homepage, you can access other tiles for functions such as My Pay or My Time in HCM (Peoplesoft HR) as well as other functions you may have access to within Peoplesoft HCM or FSCM.

