

Searching for a Menu Item in Finance Fluid Quick Reference Guide

Effective January 21, 2023

Searching for a Menu Item

Purpose: This quick reference guide shows you how to search for a menu item 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.

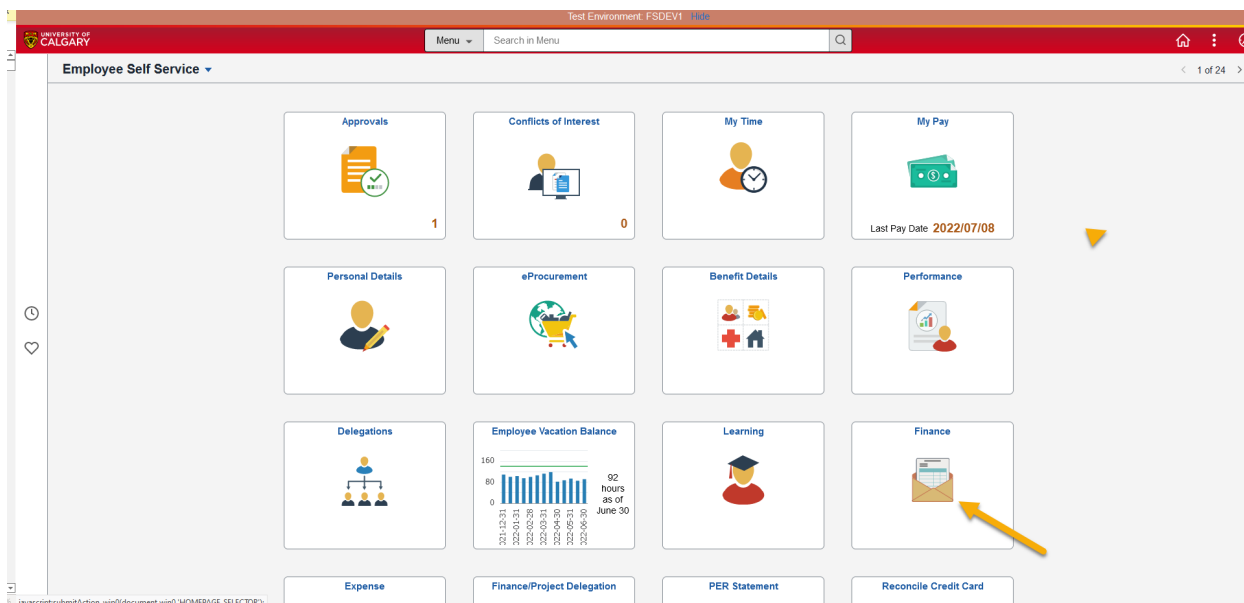
There are multiple ways to reach the menu item you need in the Fluid interface, and we will review them here.

1. Using the Functional Tiles

Navigate to the Employee Self Service home page (my.ucalgary.ca -> MyWork >Direct Access > PS Finance and Supply Chain or Use Quick Link PS Finance and Supply Chain).

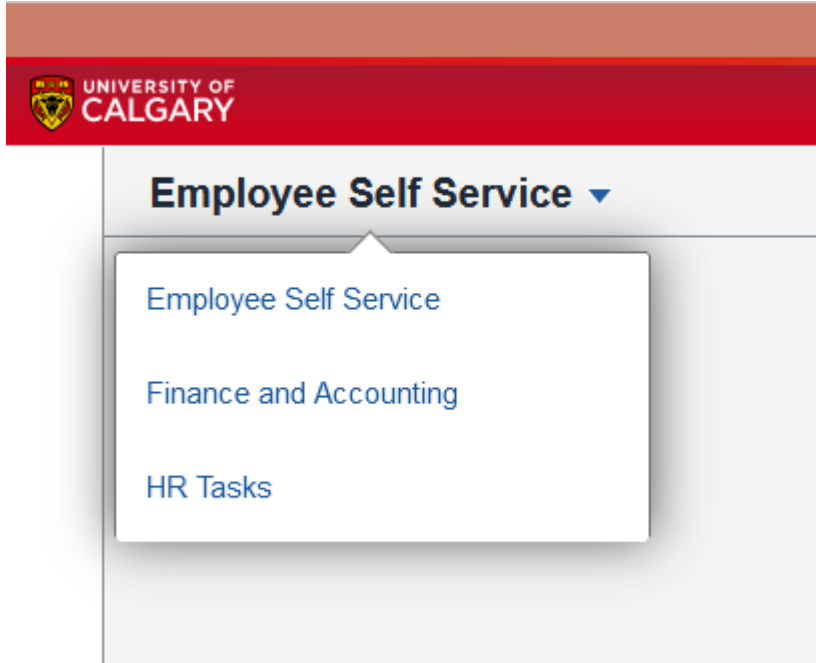
Click on the functional tile to view the Navigation Collection (ie. the actions for which you have security access within that function).

For non-finance business unit users, use the Finance tile on the Employee Self Service Homepage.

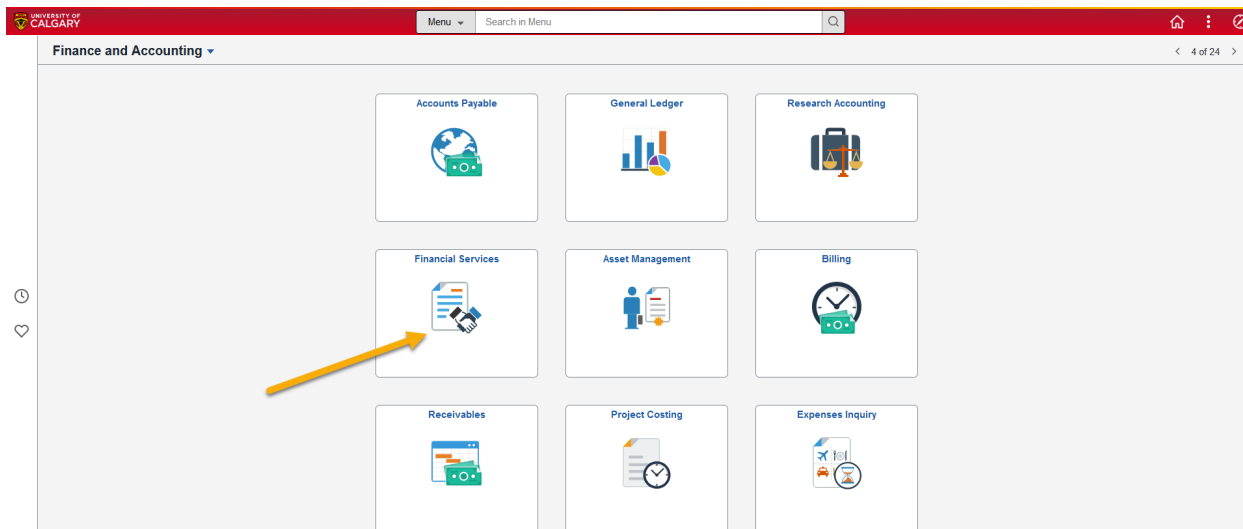


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For those in the Finance business unit, first choose the Finance and Accounting option under the Employee Self-Service drop-down menu.

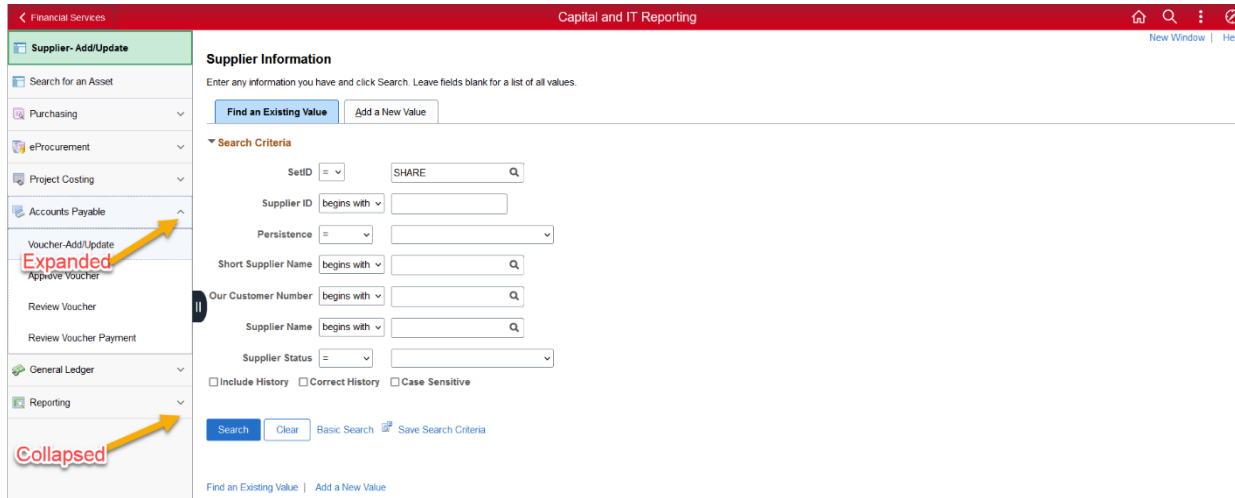


Next, click on the appropriate functional tile.

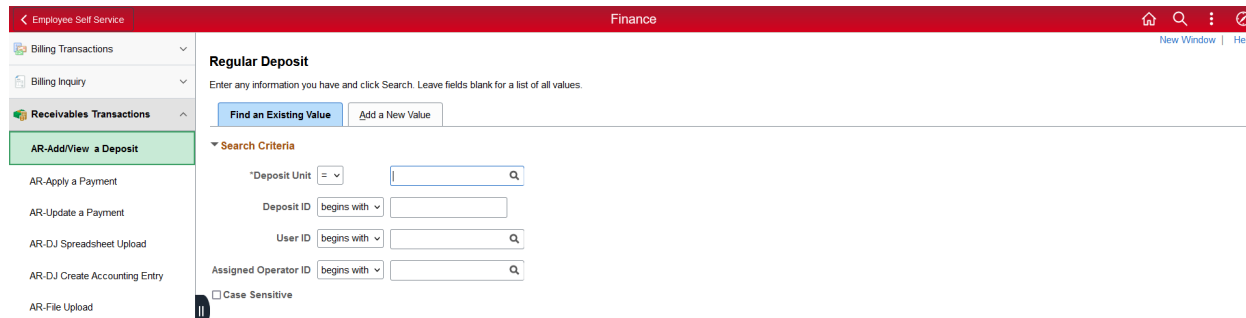


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Once you have clicked on the tile, on the left-hand side of your screen you will see a group of links and folders called a Navigation Collection. If you see an arrow, then this is a folder that can be expanded to show more menu items.



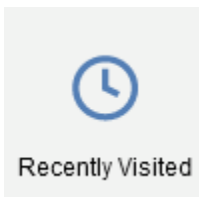
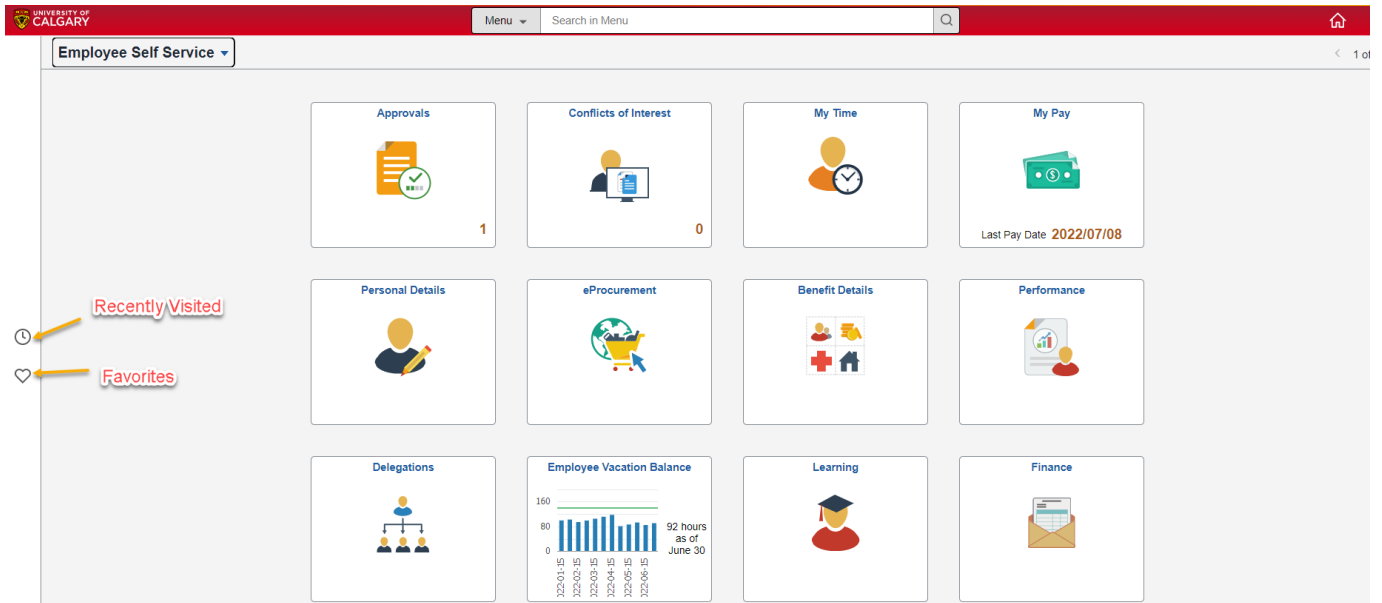
Click on the menu item to access the function you require. Functions have been grouped to make it easier to complete a multi step process without navigating to another section; a significant improvement vs. the previous Classic Cascading menu.



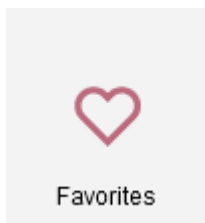
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2. Use your Favorites or Recently Visited Icons

On the left-hand side of your homepage, there are two icons that you can click to access either your Recently Visited items or Favorites.



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



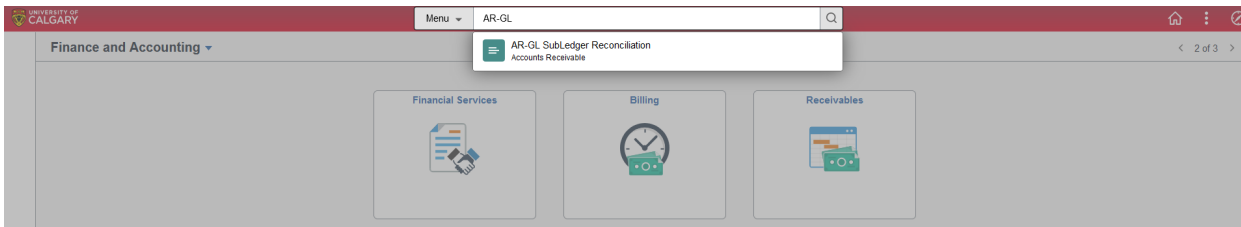
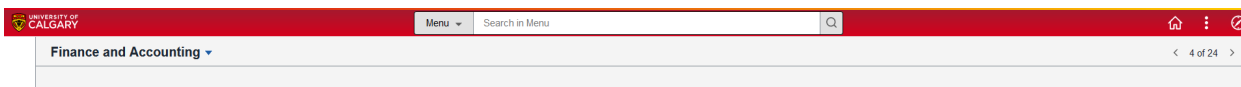
Favorites - This Icon is used to access the Favorites you have saved. Please note any Favorite that you currently have saved in the Classic menu will be saved in the transition to the new Fluid User Interface.

Both Favorites and Recently Visited can also be accessed from the Menu under the Navbar (see 4. below).

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3. Using the Global Search

The Search function in Fluid is robust. Type a few words in the search bar at the top centre of your screen to find options for menu items you are looking for.



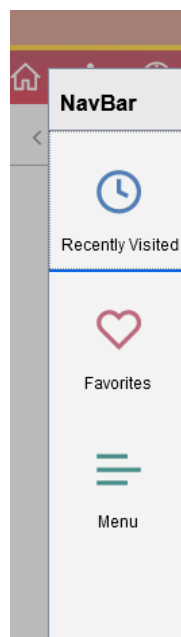
Once the desired menu item appears in the list, click on it to access it.

4. NavBar – Menu

To access the Nav Bar – click on the Compass on at the top right of your screen.



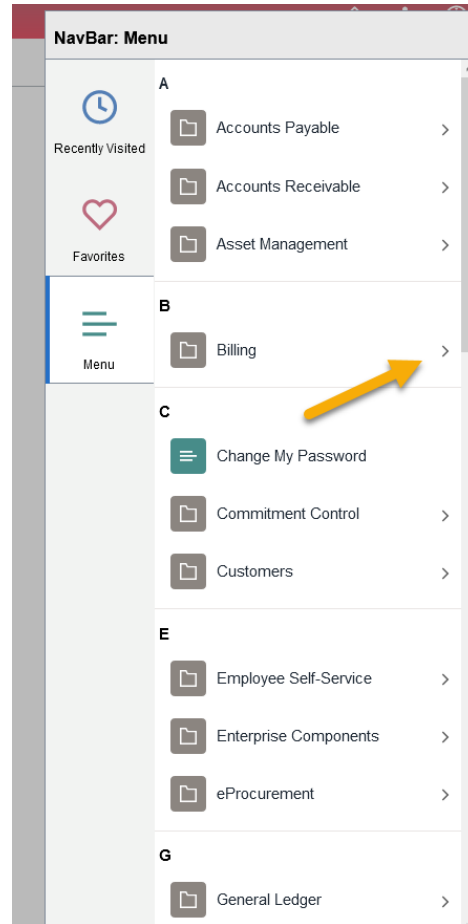
Here you will see Recently Visited and Favourites as mentioned earlier.



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You can also click on Menu to access a full list of desired items, in alphabetic order.



Use the arrow on the right to expand the folder for functional tasks.

