

PeopleSoft HCM Fluid and Tools Upgrade Delta Guide

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Welcome to the PeopleSoft HCM Fluid and Tools 8.61.05 Upgrade Delta Guide!

The PeopleSoft Human Capital Management (HCM) Development, Support and Training Teams are pleased to share the most recent *Fluid and Tools upgrade information* with all users. The upgrade marks a *significant change* in the way users will *navigate* throughout the system. *New terminology* will be introduced to help familiarize users with the new look and feel of the system. This guide will also provide details on how to utilize the *new homepage and tiles created to facilitate work* in PeopleSoft HCM. However, the basic functionality of the application remains the same.

Login Screen

The first change you will see with the new tools is to the **Login Screen**. The look of the page has changed. <u>New Orleans</u> and <u>HCSD</u> users, please login using your LSUHSC **PeopleSoft User ID and Password**. <u>Shreveport</u> users, please login using your LSUHS credentials (3 letters and 3 numbers).

	LSU Health		
	PeopleSoft HRSA - PS9HRTRN	2	
User ID			
Password			
	Sign In		

Toolbar

PS9HRPAT WEB2 🔇	♡ ⑧ △ : ∅
PS9HRTRN	 PS – PeopleSoft 9 – Version of PeopleSoft HR - System – Human Resources TRN – Database (Users will access the Production (PRD) database when working in PeopleSoft)
©	Recently Visited – Provides quick access to often used pages in PeopleSoft.
\heartsuit	Favorite – Provides quick access to often used pages in PeopleSoft.
٢	Accessibility – Accessibility options enable assistive technologies to provide users with features they can use to identify and navigate to sections of page content.
	Home - Returns you to your default homepage.
:	Actions (Three (3) dots) – Drop-down menu delivers a quick access action list consisting of the following options: <i>New Window, My Preferences, Help, and Sign Out.</i>
\oslash	NavBar – Provides tile navigation options - including <i>Search, Recently Visited, Favorites,</i> and <i>Menu</i> - to be used in conjunction with Fluid menus.

My PeopleSoft Home

Once PeopleSoft HCM is launched, the new default landing page displays. The landing page is called a homepage which serves as a navigation gateway. The homepage for HCM is "**My PeopleSoft Home**." There is a drop-down arrow on the right side of the homepage tab, but HCM utilizes only a single homepage. Users will access the tiles and navigation collections to which you have access from the **My PeopleSoft Home** or by using the **NavBar** > **Menu** options. *Tile access* is based on the user's *security access*.

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 Web Clock	
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PS9HRTRN WEB2 │ ③ ♀ ⑦			Notifications	: Ø
	nouncements	Web Clock		
Self Service	Manager Self Service	LSUHSC Forms	No notifications When new notifications arrive, th	е °О-
Business Manager	Human Resources	Benefits	When new notifications anive, the Refresh button will show a badg	e
Resident Scheduler	Time & Labor	Payroll		

The right side of the homepage shows the **Notifications** window. In the previous tools version, *notifications were denoted by a bell on the toolbar*. If the user *received an action*, a *dash or bar* would display *across the top* of the bell. In the new tools version, there is *no bell* on the toolbar and the **Notifications** window is *preset to remain open*. It *cannot be closed*. Actions will display in the **Notifications** window. Actions are *items requiring your attention*, such as approving a vacation request or another item in your worklist.

General Navigation

Announcements		Web Clock
(Ø
No Annoi	incements available	
Self Service	Manager Self Service	LSUHSC Forms
\bigcirc	000	

Fluid Navigation is now the default navigation within PeopleSoft. Tiles to which the user has access display on the homepage. Each tile serves as a navigation collection of

functions and tasks associated with the tile topic. It provides the user a quick and easy way of accessing and completing routine tasks within the system.

←∣⊙ ♡				10. 27 1 E VE S		ΔĢ: (
Self Service						
*** Benefits	^				New Window H	elp Personalize Page
Benefits Summary						
1095-C Consent		As Of Date: 02/02/2025 My Benefits				
1095-C Forms		Plan Type	Benefit Plan	Coverage	Premium per Paycheck	
Payroll Info	~	Medical	WELLCRED LSU FIRST OPT1 BTAX	Employee Only	206.56	
Personal Info	~	Dental	DENTAL BASIC BTAX	Employee Only	22.76	
🛼 My Forms	~	Vision	VISION BTAX	Employee Only	8.60	
		AD/D	LSU AD&D EMPLOYEE	110000.00	2.09	

The **Self Service** menu of *available functions and tasks* opens on the *left side* of the page. Each *functional* section has a drop-down arrow that you can click to display *tasks* pages associated with that function. A **Back** button shows on the toolbar to the *left* of the *Recently Visited* and *Favorites* icons. The **Back** button *returns* you to the **My PeopleSoft Home**.



Most left side menus have an **Expand/Collapse Menu** button. By clicking the button when the *menu is open*, it will *collapse the menu*. Conversely when the *menu is collapsed*, clicking the button will *expand the menu*.

NavBar Navigation

PS9HRTRN WEB2 🕥	♡ (?)		△ : 0	NavBar
	An alternative to tile navigati NavBar. By clicking the Nav the right of the screen display options: Search, Recently V Menu. These icons can be us navigation	vBar , a panel opens from ying a list of icon isited, Favorites , and		Recently Visited Favorites
NavBar	Search			
	Enter search keywords separated by a space.			

Clicking the **Search** icon will open a search panel which will enable users to find a transaction page without searching through submenus if s/he is unsure of its navigational location. The item used for the search **must** have a **minimum of two characters**. You can use multiple words to help focus your search as "**view pay**." Click the **Find** button to view results.

Find

Sea	Search				
Ente	r search keywords separated by a space.				
viev	r pay Find				
Se	arch Results				
1	Pay				
	View Paychecks				
	Main Menu>Fluid Structure Content>Fluid Pages>Employee Self Service>Pay				
2	Review FLSA Pay Data				
	Review earnings details used to calculate the FLSA rate. Main Menu>Payroll for North America>Payroll Processing USA>Produce Payroll>Review FLSA Pay Data				
3	Review HR/Job/Payroll Data				
	View personnel administration and employee personal information.				
	Main Menu>Benefits>Employee/Dependent Information>Review HR/Job/Payroll Data				
4	Review Pay Calendars				
	Review pay calendars or manually build a single calendar. Main Menu>Payroll for North America>Payroll Processing USA>Create and Load				
	Paysheets>Review Pay Calendars				

view pay

Search

A list of items with the words "**view pay**" will appear in a *Search Results* list. If there are more than 100 results, only the first 100 will be displayed. Either select an option from the retrieved list or change your search parameter to help focus your search.



Selecting the **Recently Visited** icon displays a list of pages previously visited. Click on the desired option to navigate to that page.



Favorites have been a popular option with users and *will be available* with the new tools. Also, your *current Favorites will be copied over into the new version*, so you do not need to worry about replicating them. The icon picture has changed in the new version, and is now designated with a **Heart**. When selecting the **Favorites** icon (heart), a list of the user's previously saved favorites will display. Click on the desired option to navigate to that page.

ing reopies	Soft Home 🗸			•		
	Annou	ncements	Web Clock		Û Û	: 0
	No Announce	ements available			New Window	
	Self Service	Manager Self Service	LSUHSC Forms		Add to Favorites	
	20	4 <u>2</u> 4			My Preferences Help	
					Sign Out	

You can add a page to your **Favorites** list however, it <u>cannot</u> be done from the *NavBar* menu. Users can only *Edit Favorites* from the *NavBar* menu. In this example, you will *add Self Service* to your Favorites. **Navigate** to the *Self Service* panel. Click the **Actions** (3 dots) link in the toolbar and select **Add to Favorites**.

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Add To Favorites	×		
*Favorite Label		A	dded 'Self Service' to Favorites
Self Service	Add		ок

The Add To Favorites pop-up window displays and defaults the name of the page you wish to save. Click the Add button. A confirmation window displays stating Self Service has been saved to Favorites. Click the OK button.

\leftarrow \odot	Favorites	P	×
	C Leave Request (SF-6)		
	Self Service		
	User Profiles		

Click the **Heart** (Favorites) icon to verify the Self Service page has been added to Favorites. Self Service displays in your Favorites list.

	NavBar: Mer	nu	
	Search	A Administer Training	>
	L Recently Visited	B Benefits	>
	Favorites	C Compensation	>
Menu	Menu	L LSUHSC Processes	>
		M	

Standard navigation options display when the NavBar Menu option is selected. These are the same options that were listed in the old Classic Menus. Options are organized alphabetically with a break between each alpha character. Scroll down using the grey bar on the right to view additional menu options.



NavBar: Me	nu
	Menu > LSUHSC Processes > Time and
	Labor
Search	
-	Use
G	= Timesheet
Recently	

Your breadcrumbs will display at the top of the menu options. Click on the desired option to navigate to the next set of menu options. Continue to select menu options until you reach your desired search page.

Mobile Phone Access

	PS9HRPAT WEB1 Q :	
	Anouncements Prograded with a new look and uppedded with a new look and with a new look and uppedded with a new look and	
LSU Health		
PeopleSoft HRSA - PS9HRPAT 1 User ID	Manager Self Service	← Self Service Q [®] :
Password		Benefits V Payroll Info V
Sign In	Business Manager <u>A</u> () A () \bigtriangledown \bigtriangledown \textcircled{O}	∴ Personal Info

Users will be able to access the system using their mobile phones. You will <u>sign in</u> using your *LSUHSC or LSUHS credentials*. The **My PeopleSoft Home** page defaults however, the *tiles are listed* rather than in a grid. Also note, the *Recently Visited*, *Favorites*, and *Accessibility* buttons display at the bottom of the panel. *Although all the tiles display, users will only have access to the Self Service, Manager Self Service and Forms tiles*. Clicking the *Self Service* tile, for example, will display the functions and tasks associated with that tile. If you click on any tile other than those listed, you will receive a blank page.

Appendix

Icons and Terminology

Icon	Term	Definition
ŵ	Home Icon	returns users to the homepage
Q	Search Icon	used to search for documents or menu options
:	Action Icon	used to perform various actions including signing out
\bigotimes	NavBar Icon	used to select the right-side navigation and menu options
\heartsuit	Favorites	provides quick access to often used pages in PeopleSoft
\odot	Recent	provides quick access to often used pages in PeopleSoft
Setf Service	Tile	Tiles are used as graphic representation of collections of pages and navigations
Self Service Benefits Benefits Summary 1095-C Consent 1095-C Forms Pay/N/2 Pay/N/2 Pay/N/2 Pay/M/2 Pay/M/2 My Forms	Navigation Collection	This is also known as a "NavCollection". These are groups of frequently used menu navigation links grouped together on a tile to facilitate ease of access in the system. The tiles and navigation collections can save users time by reducing the number of times they need to click menu options as well as alleviate issues when menu navigations are not easily remembered.

Navigation Examples

Classified Timesheet

Old (Tools 8.58.07):

awon i	tes 🔻	Main M	enu 🔻	> S	elf Servic	e▼	> Time R	eporting	▼ > V	iew Times	heet			Search	🟫 Home	Sign Ou
	HRTS1														C Notification	Ø NavBa
mp	I ID:			Rcd#:	0								<u>N</u>	ew Window	Help Personal	ize Page
² Ei	mpi Data								TL I	.eave Dat	a			1-2 of 2		
Inc	dc:	Classifie		-/P: Full-			Hrs: 40.00		<u>Plan</u> <u>Type</u>	Descrip		ate I	Timesheet Balance	<u>Leave</u> Balance		
			AFTER	5 HRS A	ND 15		n Dt:		50	Sick		2/08/24				
Jo	b Code:	нка				ov	r: 40 O1	I-R	51	Vacatio	n 1:	2/08/24				
	ept ID: egin Date	: 02/03/	2025	End Dat	e: 02/16	/202	5 <u>Pay Ruk</u>									
									10/2025	🕅 🎓 Refresh)		<< Prev Period	ous <u>Ne</u>	xt Period >>	
_	unch and	Elanse	d Time	Detail								l q	A 🛛 🖉	1-14 of 14		
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P	Date	Day	Xfer		Out		TRC			ikip/Take Meal	Hazard In Chrg			e Comment le Code		
		Day			Out		TRC									
-	Date	Day Mon			Out		TRC									
-	Date 02/03/25 02/04/25	Day Mon Tue			Out		TRC									
	Date 02/03/25 02/04/25 02/05/25	Day Mon Tue Wed			Out		TRC									
	Date 02/03/25 02/04/25	Day Mon Tue Wed Thu			Out		TRC									

New (Tools 8.61.05):

←∣© ♡											Ô:	Ģ
Self Service												
*** Benefits	~				Empl ID				New Wir	ndow Help	Personalize	e Page
Payroll Info	^				Empl Record	0						
Paychecks		Empl Data						TL Leav	ve Data			
Timesheet		Class Indc Meal	30 MIN AFTER 5 H	HRS AND 15 H	RS	Term Dt	40.00	Plan Type 50	Description	Accrual Date 12/08/24	Timesheet Balance	_
W-2/W-2c Forms		Job Code Dept ID				F/P	40_01-R Full-Time	50	Vacation	12/08/24		-
W-2/W-2c Consent		Begin Date	02/03/2025 E	nd Date 02/1	6/2025	Pay	Rule					
Personal Info	~			D	ate 02/10/20	25 🛗	Refresh	<< Pre	vious Period	Next Period >	*>	
🚉 My Forms	~	Punch and Fla	apsed Time Detail	1								
		E									<	1-
		Reported	lime Override	s ⊪⊳								
			Date	Day	Xfer	In	Out	TR	с н		Cumu lative	Co Co
		-	02/03/25	Mon								
		_	02/04/25	Tue								
		-	02/05/25	Wed								

Payroll and Compensation

Old (Tools 8.58.07):

Favorites 🔻	Main Menu 🔻		Search	A Home	Sign Out
PS9HRTS1 WEBDPS1	Self Service	Time Reporting		لُ Notification	⊘ NavBar
		 Personal Information Payroll and Compen Benefits My Forms Certifications 			? Help

< Home		Pay			: ⊘
Paychec	ks				í
	nd To Date are populated with a deferent set of paychecks.	ault date range of 3 months based on the la	st issued check date.	Modify the dates and select Ap	ply
*From Date	09/13/2024 Date	12/13/2024	Apply		
					↑↓
Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number	
12/13/2024	LSUHSC-New Orleans	11/25/2024 12/08/2024			•
11/27/2024	LSUHSC-New Orleans	11/11/2024 11/24/2024			>
11/15/2024	LSUHSC-New Orleans	10/28/2024 11/10/2024			>
11/01/2024	LSUHSC-New Orleans	10/14/2024 10/27/2024			>

New (Tools 8.61.05):

← ③ ♡ Self Service						Û Ç	ı : ⊘
*** Benefits	~	From Date and To different set of pa		It date range of 3 months based on the last issu	ued check date. Modify	the dates and select Appl	y to view a
💻 Payroll Info	^	*From Date 09		12/13/2024	Apply		
Paychecks						Click An View Pay	
Timesheet		Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number	
W-2/W-2c Forms		12/13/2024	LSUHSC-New Orleans	11/25/2024 12/08/2024			Þ
W-2/W-2c Consent	~	11/27/2024	LSUHSC-New Orleans	11/11/2024 11/24/2024			>
My Forms	~	11/15/2024	LSUHSC-New Orleans	10/28/2024 11/10/2024			>
		11/01/2024	LSUHSC-New Orleans	10/14/2024 10/27/2024			>

Unclassified Absence Request

Old (Tools 8.58.07):

Favorites 🔻 🛛 M	1ain Menu 🔻	\rightarrow	Self Servic	ce 🔻 > 🕴	Absence 🔻 >	Absence	Request	(SF-6)			Sea	arch		合 Hom	ie	Sign Out
	þ														↓ fication	() NavBar
Absence Req	uest (SF-6))									Ne	w Win	dow	Help F	Persona	alize Page 🔺
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Job Title:					Empl Rcd:	0										
				Leave B	Jalance							1	2			
Create New A	bsence Requ	est		Plan Type	As Of Date	Balance	Current Approve		Current P Ending Ba		Future Period Approved Leave		ire Per ing Ba			
Sefresh 🕏				Sick	12/31/2024						0.00					
				Vacation	12/31/2024	1					0.00					
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Absence Re	equest Histe	огу			Find	View 100	2	First	1-1	0 of 455	i 🕑 Last					
Absence Type	Status	FMLA/ Other	Start Date	Start Time	e End Date	End Time	Hours	Trans Nbr	Delete	Prior N	br Action					- 1
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											Delete					
											Delete					-

New (Tools 8.61.05):

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Self Service											
한 Benefits 🗸 🗸	Manage Abs	ence							New Window	Help	Personalize Page 🔺
💻 Pay/W2 🗸							Empl ID				
ैं/ Personal Info 🔷 🔨	Job Title Create New	Absence Requ	iest			E	mpl Rcd	0			
Manage Absences	Leave Balance	;									
Certifications	E						1-2	of 2 🗸			
Timesheet	Plan Type	As Of Date	Balance	Current Approved	Current Ending Bal	Future Approve		uture ing Bal			
Veteran Status	Sick	11/30/2024		0.00		(0.00				
Disability	Vacation	11/30/2024					0.00				
📑 My Forms 🗸 🗸	Off-Campus A	ctivity									
	Fiscal Yea	r Max A	llowed Hrs	Hrs Taken FY	TD I	Balance					
	202	5	120.00	0	.00	120.00					
	Last 10 Reque	sts									
	E, Q				< 1-10	of 10 🗸		View All			
	Absences	Details									
	Action Abs	ence Type	Status	FMLA/ Other Start	Date En	l Date	Hours	Trans Nbr			*