



PeopleSoft HCM Fluid and Tools Upgrade Delta Guide

February 13, 2025

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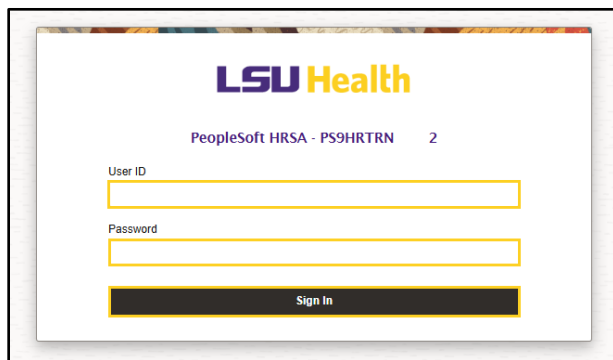
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Welcome to the PeopleSoft HCM Fluid and Tools 8.61.05 Upgrade Delta Guide!

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.

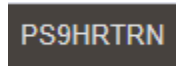
Login Screen

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



The screenshot shows the login interface for LSU Health. At the top, the "LSU Health" logo is displayed in blue and yellow. Below the logo, the text "PeopleSoft HRSA - PS9HRTRN 2" is visible. The login form consists of three main elements: a "User ID" label followed by a yellow-bordered input field, a "Password" label followed by a yellow-bordered input field, and a black "Sign In" button with white text at the bottom.

Toolbar



1. **PS** – PeopleSoft
2. **9** – Version of PeopleSoft
3. **HR** - System – Human Resources
4. **TRN** – Database (Users will access the Production (PRD) database when working in PeopleSoft)



Recently Visited – Provides quick access to often used pages in PeopleSoft.



Favorite – Provides quick access to often used pages in PeopleSoft.



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.



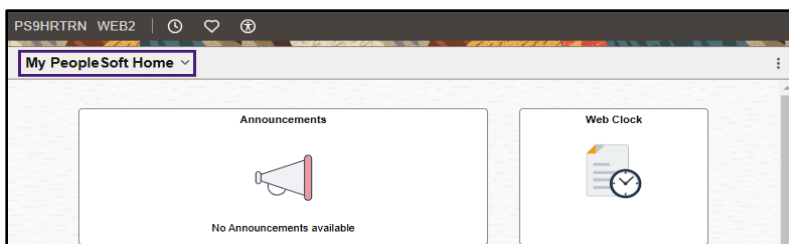
Actions (Three (3) dots) – Drop-down menu delivers a quick access action list consisting of the following options: *New Window, My Preferences, Help, and Sign Out.*

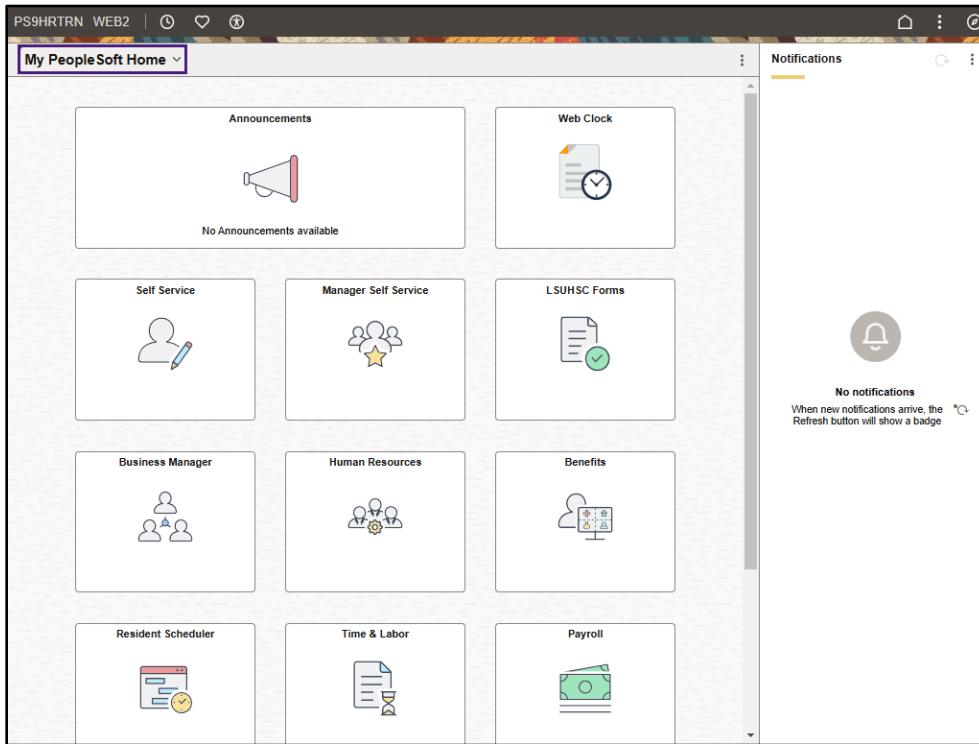


NavBar – Provides tile navigation options - including *Search, Recently Visited, Favorites, and Menu* - to be used in conjunction with Fluid menus.

My PeopleSoft Home

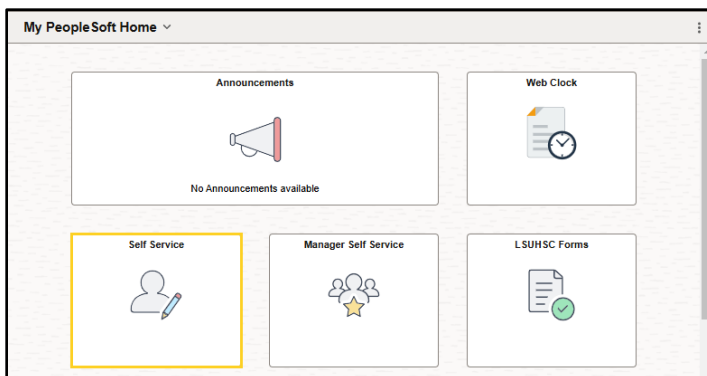
Once PeopleSoft HCM is launched, the new default landing page displays. The landing page is called a homepage which serves as a navigation gateway. The homepage for HCM is “**My PeopleSoft Home.**” There is a drop-down arrow on the right side of the homepage tab, but HCM utilizes only a single homepage. 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*.





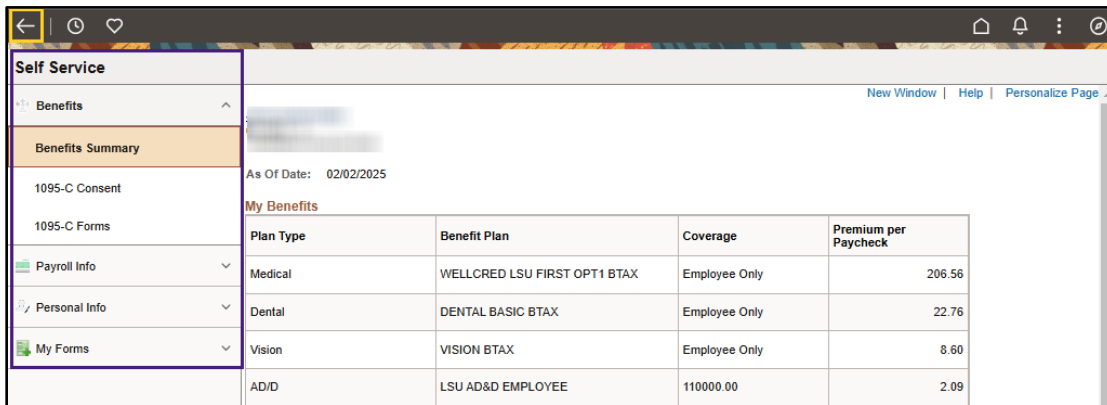
The right side of the homepage shows the **Notifications** window. In the previous tools version, *notifications were denoted by a bell on the toolbar*. If the user *received an action*, a dash or bar would display *across the top of the bell*. In the new tools version, there is **no bell** on the toolbar 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 workload.

General Navigation

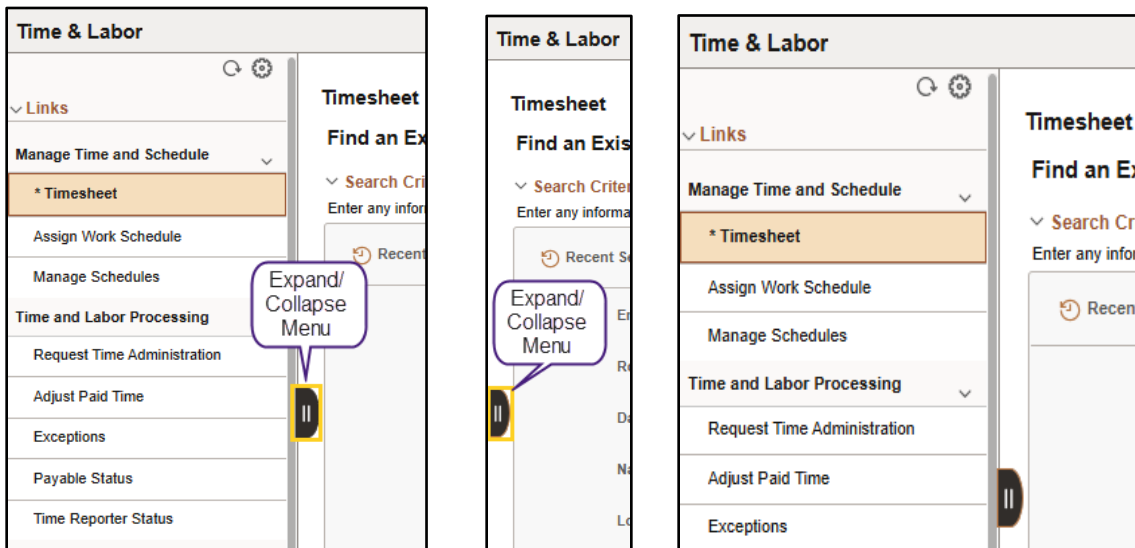


Fluid Navigation is now the default navigation within PeopleSoft. **Tiles** to which the user has access display on the homepage. Each **tile** serves as a **navigation collection** of

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.

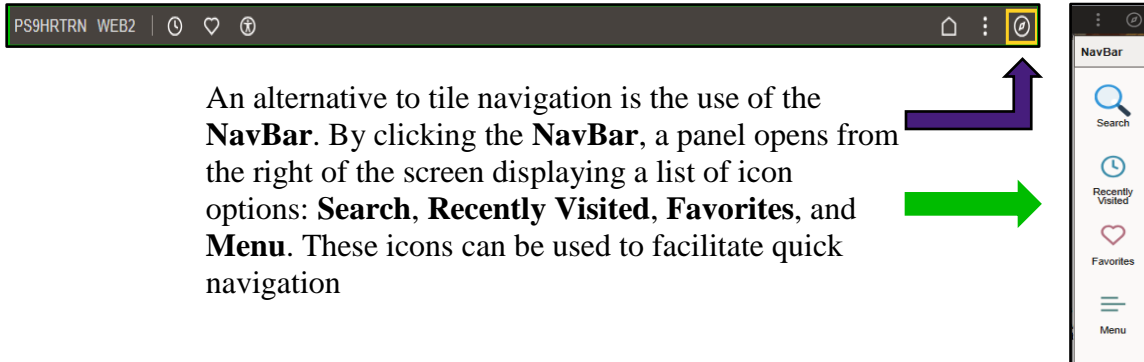


The **Self Service** menu of *available functions and tasks* opens on the *left side* of the page. Each *functional* section has a drop-down arrow that you can click to display *tasks* pages associated with that function. A **Back** button shows on the toolbar to the *left* of the *Recently Visited*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

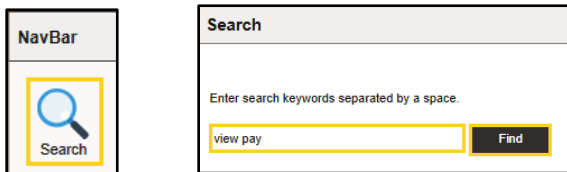


Most left side menus have an **Expand/Collapse Menu** button. By clicking the button when the *menu is open*, it will *collapse the menu*. Conversely when the *menu is collapsed*, clicking the button will *expand the menu*.

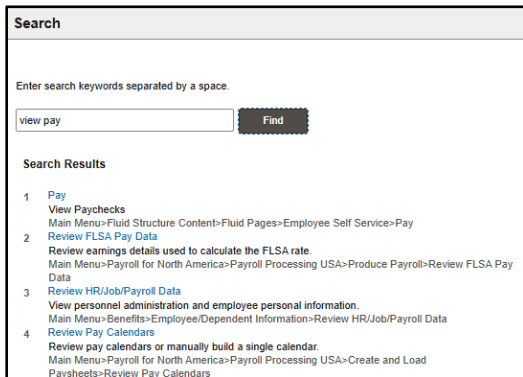
NavBar Navigation



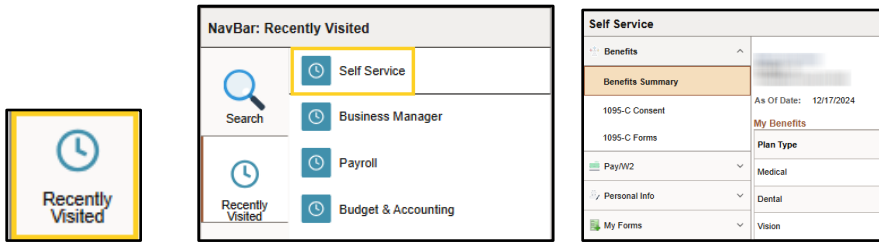
An alternative to tile navigation is the use of the **NavBar**. By clicking the **NavBar**, a panel opens from the right of the screen displaying a list of icon options: **Search**, **Recently Visited**, **Favorites**, and **Menu**. These icons can be used to facilitate quick navigation



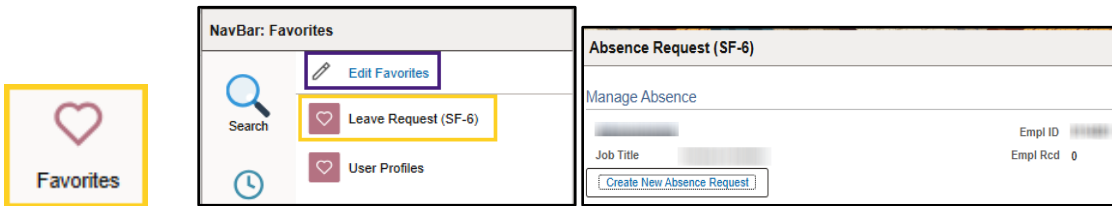
Clicking the **Search** icon will open a search panel which will enable users to find a transaction page without searching through submenus if s/he is unsure of its navigational location. The item used for the search **must** have a **minimum of two characters**. You can use multiple words to help focus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



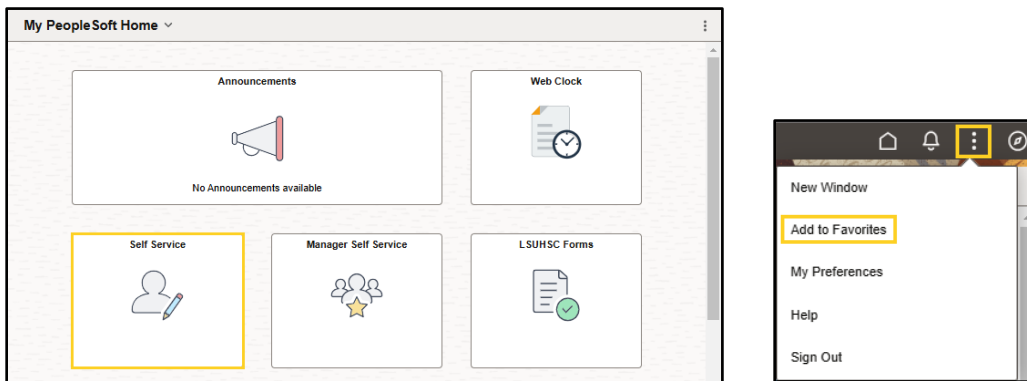
A list of items with the words “**view pay**” will appear in a **Search Results** list. If there are more than 100 results, only the first 100 will be displayed. Either select an option from the retrieved list or change your search parameter to help focus your search.



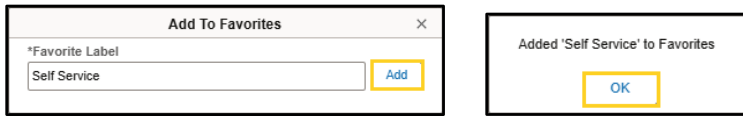
Selecting the **Recently Visited** icon displays a list of pages previously visited. Click on the desired option to navigate to that page.



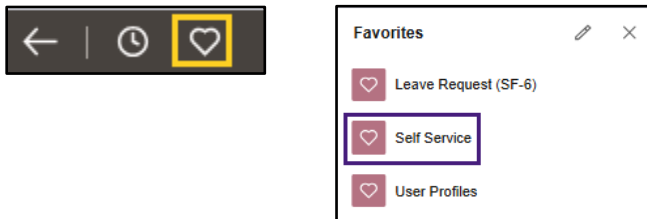
Favorites have been a popular option with users and *will be available* with the new tools. Also, your *current Favorites will be copied over into the new version*, so you do not need to worry about replicating them. The icon picture has changed in the new version, and is now designated with a **Heart**. 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.



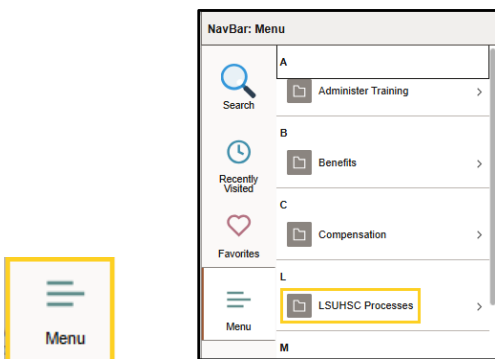
You can add a page to your **Favorites** list however, it cannot be done from the *NavBar* menu. Users can only *Edit Favorites* from the *NavBar* menu. In this example, you will *add Self Service* to your Favorites. **Navigate** to the *Self Service* panel. Click the **Actions** (3 dots) link in the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



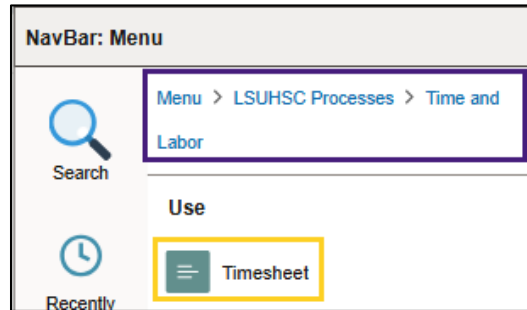
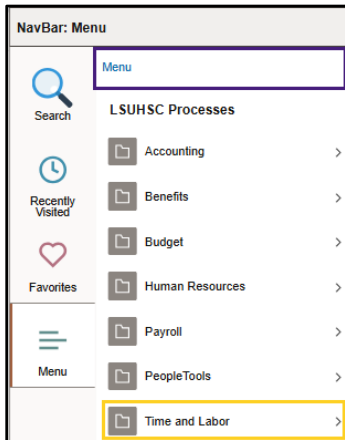
The **Add To Favorites** pop-up window displays and defaults the name of the page you wish to save. Click the **Add** button. A *confirmation window* displays stating **Self Service** has been saved to **Favorites**. Click the **OK** button.



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

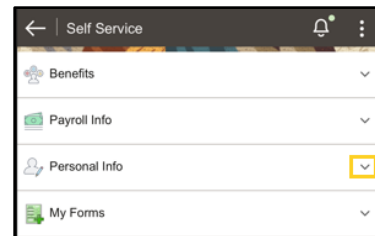
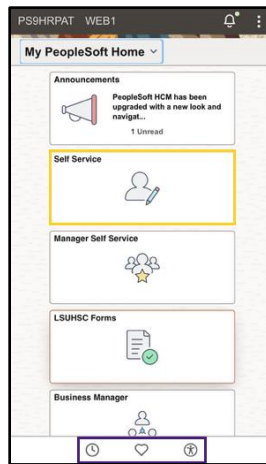
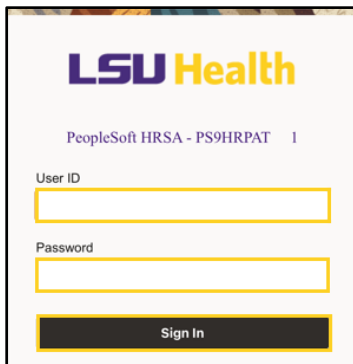


Standard navigation options display when the **NavBar Menu** option is selected. These are the same options that were listed in the *old Classic Menus*. Options are organized alphabetically with a break between each alpha character. Scroll down using the grey bar on the right to view additional menu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



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.








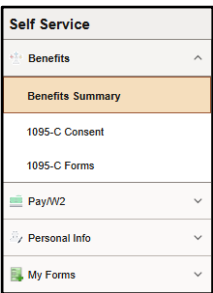
Mobile Phone Access



Users will be able to access the system using their mobile phones. You will sign in 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

<i>Icon</i>	<i>Term</i>	<i>Definition</i>
	Home Icon	returns users to the homepage
	Search Icon	used to search for documents or menu options
	Action Icon	used to perform various actions including signing out
	NavBar Icon	used to select the right-side navigation and menu options
	Favorites	provides quick access to often used pages in PeopleSoft
	Recent	provides quick access to often used pages in PeopleSoft
	Tile	Tiles are used as graphic representation of collections of pages and navigations
	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):

PS9HRTST
WEBDPS1

Emp ID: [redacted] Rcd#: 0

Emp Data

Class: Classified F/P: Full-Time Std Hrs: 40.00
 Indc: [redacted]
 Meal: 30 MIN AFTER 5 HRS AND 15 Term Dt: [redacted]
 Job Code: HRS OVT: 40_O1-R
 Dept ID: [redacted]

Begin Date: 02/03/2025 End Date: 02/16/2025 Pay Rule

TL Leave Data 1-2 of 2

Plan Type	Description	Accrual Date	Timesheet Balance	Leave Balance
50	Sick	12/08/24	[redacted]	[redacted]
51	Vacation	12/08/24	[redacted]	[redacted]

Date: 02/10/2025 Refresh << Previous Period Next Period >>

Punch and Elapsed Time Detail 1-14 of 14

Date	Day	Xfer	In	Out	TRC	Hours	Cumulative	Skip/Take Meal	Hazard/In Chrg	Callback/NoPay	Override Overtime	Comment Code
02/03/25	Mon											
02/04/25	Tue											
02/05/25	Wed											
02/06/25	Thu											
02/07/25	Fri											

New (Tools 8.61.05):

Self Service

Emp ID: [redacted]
Emp Record: 0

Emp Data

Class Indc: Classified Std Hrs: 40.00
 Meal: 30 MIN AFTER 5 HRS AND 15 HRS Term Dt: [redacted]
 Job Code: [redacted] OVT: 40_O1-R
 Dept ID: [redacted] F/P: Full-Time
 Begin Date: 02/03/2025 End Date: 02/16/2025 Pay Rule

TL Leave Data

Plan Type	Description	Accrual Date	Timesheet Balance
50	Sick	12/08/24	[redacted]
51	Vacation	12/08/24	[redacted]

Date: 02/10/2025 Refresh << Previous Period Next Period >>

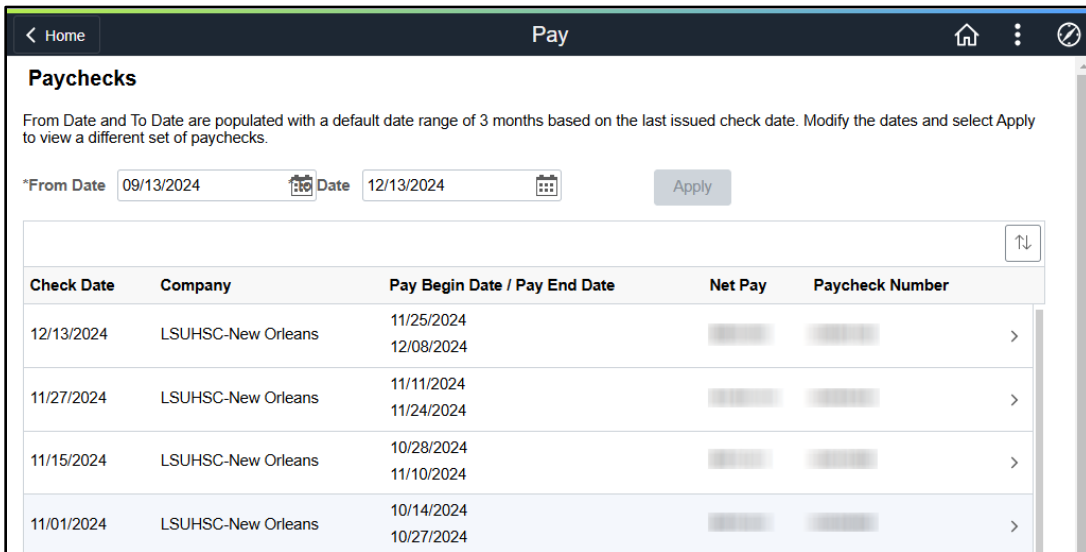
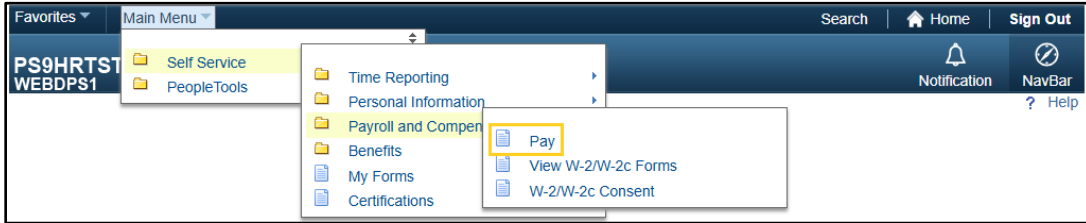
Punch and Elapsed Time Detail

Reported Time Overrides

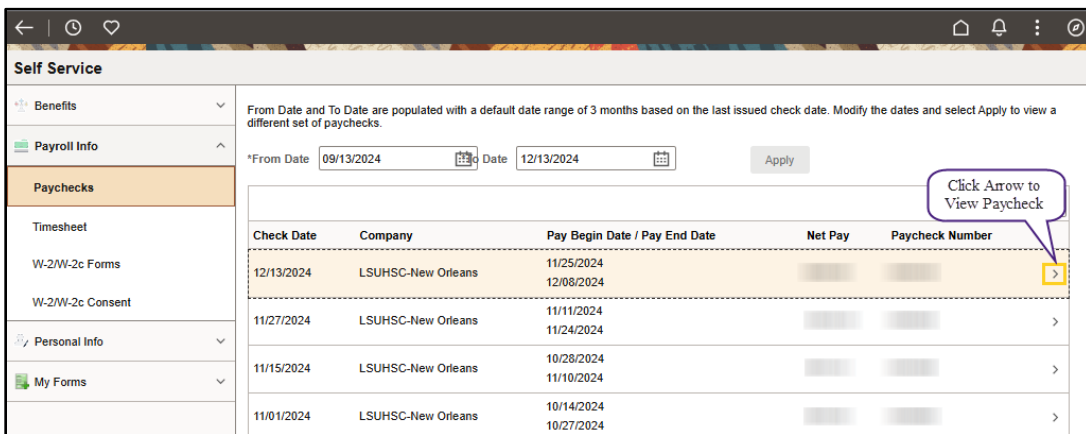
Date	Day	Xfer	In	Out	TRC	Hours	Cumulative	Cor Coc
02/03/25	Mon							
02/04/25	Tue							
02/05/25	Wed							

Payroll and Compensation

Old (Tools 8.58.07):



New (Tools 8.61.05):



Unclassified Absence Request

Old (Tools 8.58.07):

PS9HRPRD
WEB4

Absence Request (SF-6)

Empl ID: [redacted]
Job Title: [redacted] Empl Rcd: 0

[Create New Absence Request](#)

[Refresh](#)

Plan Type	As Of Date	Balance	Current Period Approved Leave	Current Period Ending Balance	Future Period Approved Leave	Future Period Ending Balance
Sick	12/31/2024	[redacted]	[redacted]	[redacted]	0.00	[redacted]
Vacation	12/31/2024	[redacted]	[redacted]	[redacted]	0.00	[redacted]

Fiscal Year	Max Allowed Hrs	Hrs Taken FYTD	Balance
2025	120.00	0.00	120.00

Absence Type	Status	FMLA/Other	Start Date	Start Time	End Date	End Time	Hours	Trans Nbr	Delete	Prior Nbr	Action
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	<input type="checkbox"/>	[redacted]	Delete
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	<input type="checkbox"/>	[redacted]	Delete
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	<input type="checkbox"/>	[redacted]	Delete
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	<input type="checkbox"/>	[redacted]	Delete
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	<input type="checkbox"/>	[redacted]	Delete
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	<input type="checkbox"/>	[redacted]	Delete

New (Tools 8.61.05):

Self Service

Manage Absence

Empl ID [redacted]
Job Title [redacted] Empl Rcd 0

[Create New Absence Request](#)

Plan Type	As Of Date	Balance	Current Approved	Current Ending Bal	Future Approved	Future Ending Bal
Sick	11/30/2024	[redacted]	0.00	[redacted]	0.00	[redacted]
Vacation	11/30/2024	[redacted]	[redacted]	[redacted]	0.00	[redacted]

Fiscal Year	Max Allowed Hrs	Hrs Taken FYTD	Balance
2025	120.00	0.00	120.00

Last 10 Requests

1-10 of 10 View All

Action	Absence Type	Status	FMLA/Other	Start Date	End Date	Hours	Trans Nbr
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
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