

# PeopleSoft Fluid Sneak Peek

Presented by SDCOE EBS | April 18, 2019

# Demo Format

## Project Overview

- 5 Ws (who, what, where, when, why)

## 6-minute Video

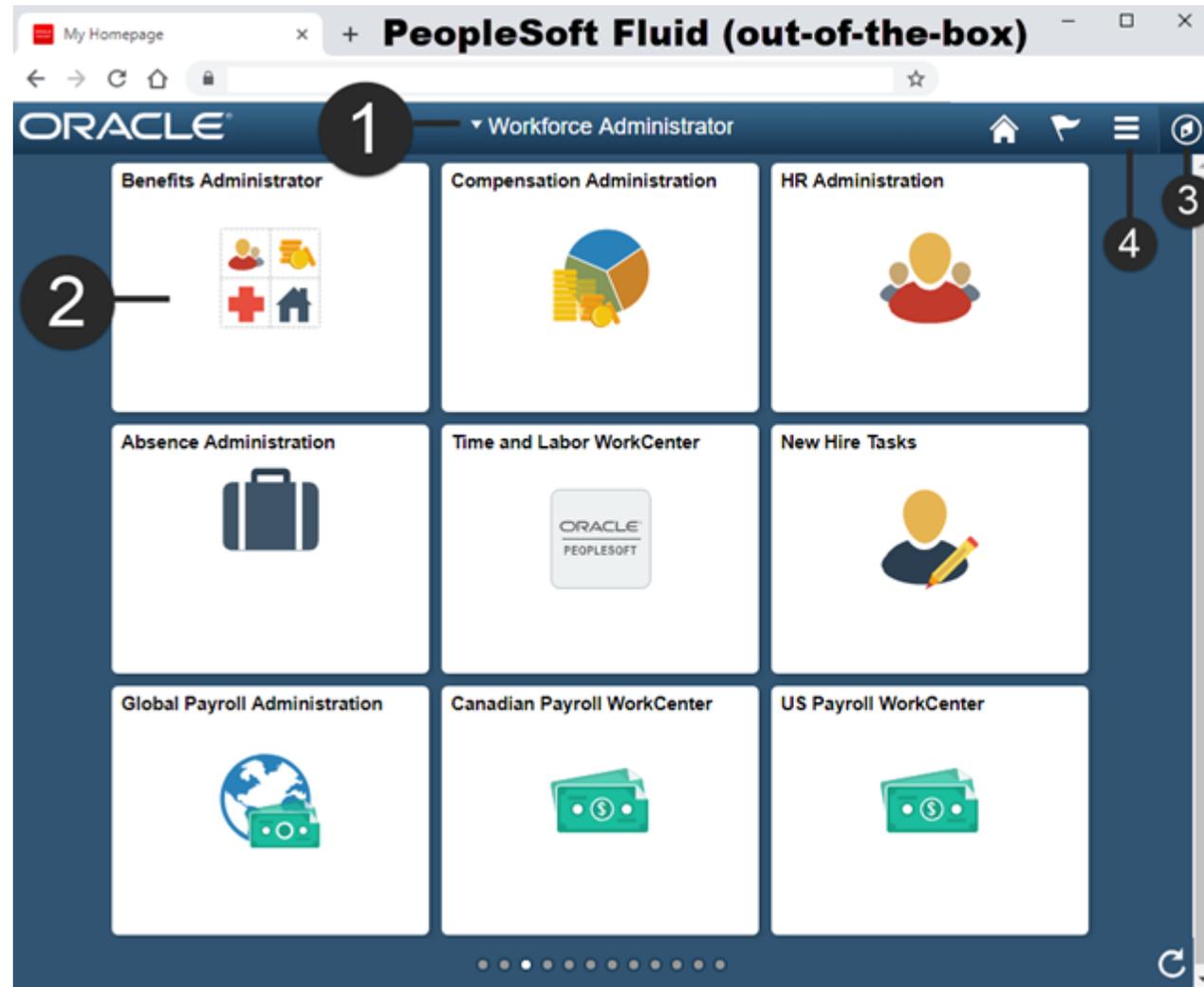
- Side-by-side comparison of how screens look today compared to Fluid for HCM and Finance users (Examples: Job Data, DBT, Supplier screens)
- A focus on navigation
- Key elements: Homepages, Tiles, the Navbar (which is where you can access favorites and also perform navigation similar to the Main Menu you are used to), and the "hamburger" Action List (3 lines)
- You'll see what won't change: Screens look the same

## Discussion

- How we are getting user feedback, plus other ways you can be involved
- Q&A

# PeopleSoft Fluid

- **In our next PeopleSoft upgrade we will be turning on the Fluid User Interface, referred to as "Fluid."** Fluid will change the look-and-feel of PeopleSoft, including a new way to navigate.
- **Who will see the change?** All employees will see the new user interface introduced by Fluid, including employees who log in to view their paychecks and perform other self-service functions.
- **Why are we making the change?** The upgrade to Fluid is a "foundational" project that will allow us to continue with fixes and system updates.
- **When is this happening?** Anticipated Summer 2019.



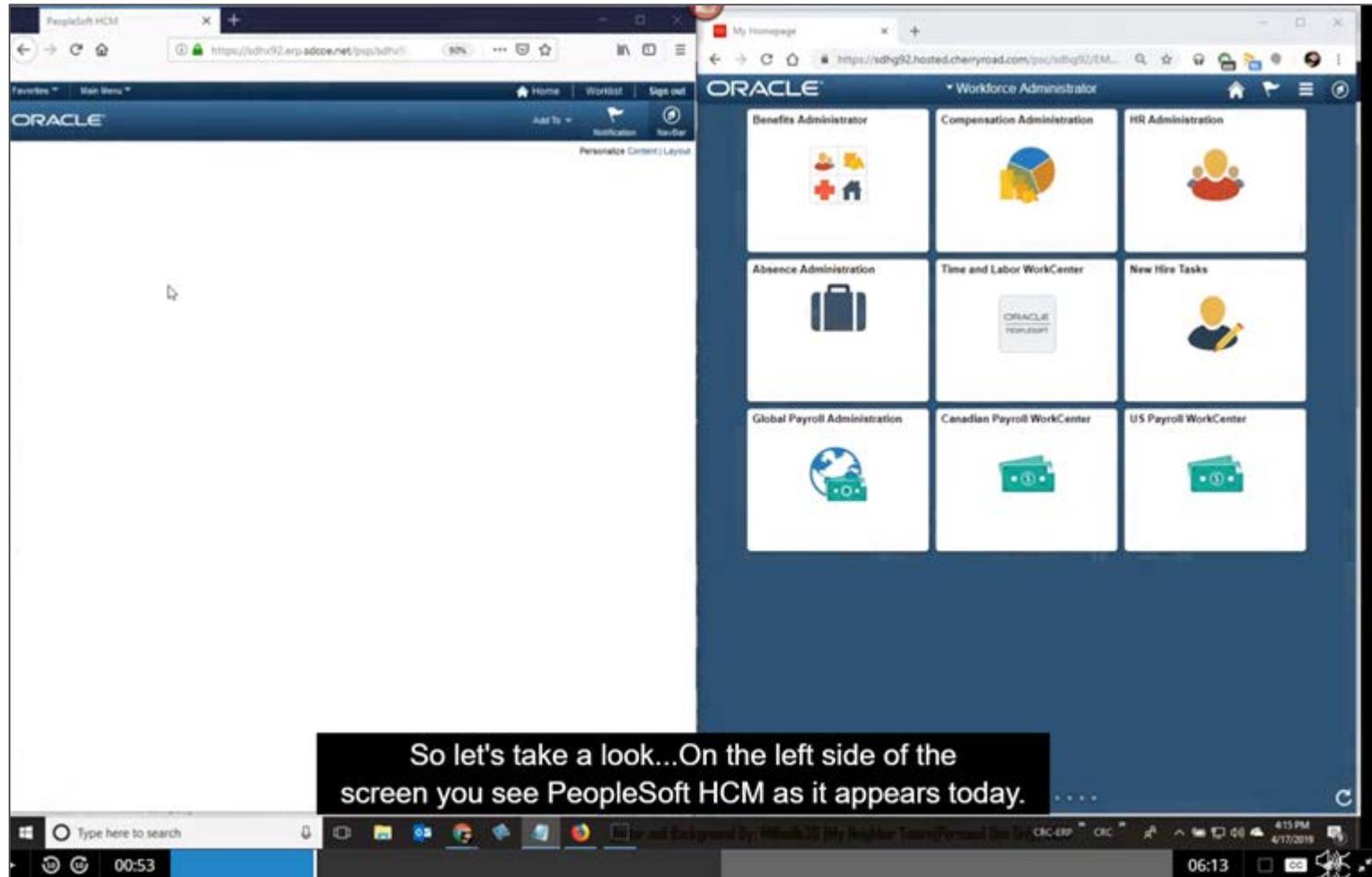
## Fluid Elements

1. Homepages
2. Tiles
3. Navbar
4. "Hamburger" (three lines)

**It is very important to note that the change to Fluid will not impact the way you perform tasks.**

In other words, you will follow the same steps to add a new hire, enter a requisition, enter time on the Timesheet, create a voucher, and so on.

# 6-minute video



## Demo Contents

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- You'll see what won't change: Search and screens look the same

Link to the 6-min video: <https://screencast-o-matic.com/watch/cqfFcNZTQg>

# User Involvement

## FEEDBACK

- Discovery sessions with users for feedback on their needs

## VALIDATIONS

- User involvement in validating the implementation

## TRY IT!

- Environment for users to log in and try out navigating to your favorite screens

## HEAR FROM EBS (AND HELP SPREAD THE WORD)

- Roadshows and webinars to demo the new navigation

## SUPPORT

- District Office: SDCOE will provide you with a “Communications Toolkit” to assist district offices with announcements and messaging (template articles, FAQ sheets)
- SDCOE will create instructional resources, like job aids and short video tutorials with “how to’s”

# Summary

## KEY ELEMENTS OF FLUID:

- Homepages, Tiles, the Navbar (which is where you can access favorites and also perform navigation similar to the Main Menu you are used to), and the "hamburger" Action List (3 lines)

## WHAT WON'T CHANGE:

- Screens
- How you perform tasks

## WHAT IS BEING CONFIGURED?

- Please keep in mind that what you see here is not yet configured so it may look different when you start using it.

Some examples:

- Out of the box, the top of the page has an Oracle logo - that might change.
- Out of the box, the page background is dark blue - that might change.
- There are tiles, icons, and labels that you see in our demo environment - how those look or are labeled might change.

## SUPPORT:

- Once configured, we will provide job aids and short video tutorials to aid you with the transition.
- <http://crc.sdcoe.net/projects/fluid>

# Questions Asked at Third Thursday Demo

Email additional questions to Project Lead: [sally.morton@sdcoe.net](mailto:sally.morton@sdcoe.net)

We will post all questions at <http://crc.sdcoe.net/projects/fluid>

- Initial feedback:
  - Looks great, can't wait
  - Seems like the new look and feel will be modernized and easier to navigate
  - Schools end in June so we need to get all site employees the information to look at paychecks, requisitions, budget transfers, and journal entries
- Is there an option to switch back to Classic view?
- Will the login change?
- Will existing Favorites carry over?
- Will we need to re-save our Favorites once Fluid begins?
- Can I still open a New Window?
- Follow up question...Eventually, we will not be able to toggle between windows?
- Can the Main Menu be alphabetized?
- Will the process for changing passwords change?
- Can all browsers be used?
- How about the spinning wheel of death?
- Will it be hard for site users (site secretaries, for example)?
- Who decides which tiles we will have? A: This is why we are having user feedback sessions now.
- If we need additional tiles, will that be requested through the SDCOE Service Portal?
- Once tiles are set, are they customizable and can we move them around as we please?
- How much advance notification will we be provided before Go Live? Will the date be available mid-June before staff leave for summer?