



Financial Services/Comptroller

Login/Navigation 101 for Super User Acceptance Testing (06/04/18 – 06/21/18)

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Updated:

05/29/2018

Welcome Super Users

The entire UTRGV PeopleSoft 9.2 Team is excited to have you here.
We thank you for joining us.

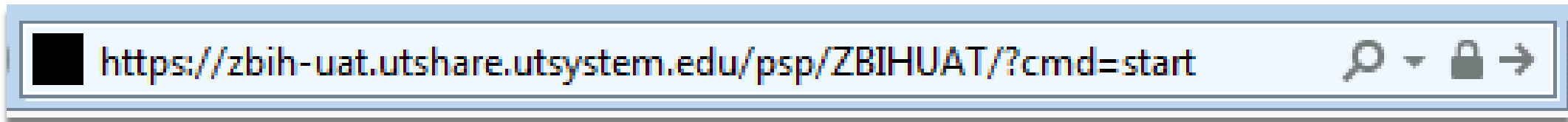
Knowing you are anxious to get started there are a few administrative tasks we must address.

1. LOG IN
2. NAVIGATION basics

NOTE: This document will be updated once the testing period has ceased and prior to GOING LIVE (09/01/2018). The changes to this document will specifically reflect how everyone can access PEOPLESOFT 9.2 via the **my.UTRGV.edu** website.

Logging In

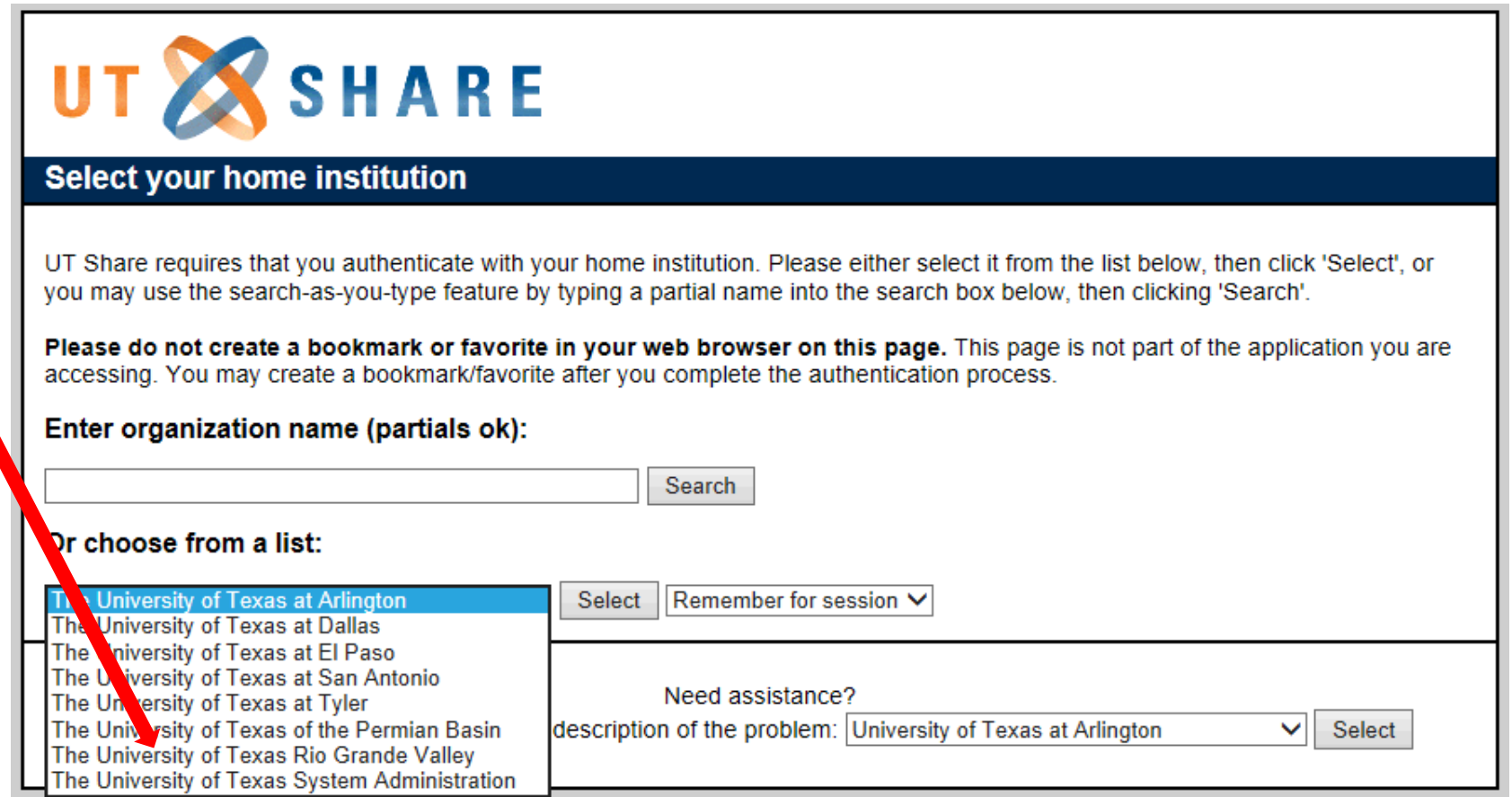
- Open Internet Browser
 - Internet Explorer (recommended)
- During the User Testing Period (06/04/18 – 06/21/18) please enter the following link:
<https://zbih-uat.utshare.utsystem.edu/psp/ZBIHUAT/?cmd=start>



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- **NOTE:** As of SEPTEMBER 1, 2018, the login process in PeopleSoft production will be through the My UTRGV portal found at <https://my.utrgv.edu>.

Logging In

- Please select **The University of Texas Rio Grande Valley** from the drop down list



UT SHARE

Select your home institution

UT Share requires that you authenticate with your home institution. Please either select it from the list below, then click 'Select', or you may use the search-as-you-type feature by typing a partial name into the search box below, then clicking 'Search'.

Please do not create a bookmark or favorite in your web browser on this page. This page is not part of the application you are accessing. You may create a bookmark/favorite after you complete the authentication process.

Enter organization name (partials ok):

Or choose from a list:

- The University of Texas at Arlington**
- The University of Texas at Dallas
- The University of Texas at El Paso
- The University of Texas at San Antonio
- The University of Texas at Tyler
- The University of Texas of the Permian Basin
- The University of Texas Rio Grande Valley
- The University of Texas System Administration

Need assistance?

description of the problem:

Logging In

- Sign In with your UTRGV network credentials



Online Services Login

Sign in with your UTRGV account

[Can't access your account?](#)

To protect your personal information, please close ALL open browser windows when you sign out.

By pressing the Sign in button, you agree to:

- › Use the system and data only for official University transactions.
- › Never share your password or access.

Help

- › Brownsville: (956) 882-2020
- › Edinburg: (956) 665-2020

Unauthorized use of this site is prohibited and may subject you to civil and criminal prosecution. Usage may be subject to security testing and monitoring.

DUO 2 Factor Authentication (if applicable)

- When logging into portal, you will have you authenticate only after you have accessed an FMS component of the system.
- You will either receive a push to your cell phone through the app or receive a phone call depending on your 2 factor set-up.
- Follow the directions for 2 factor to access Financials



FLUID Navigation

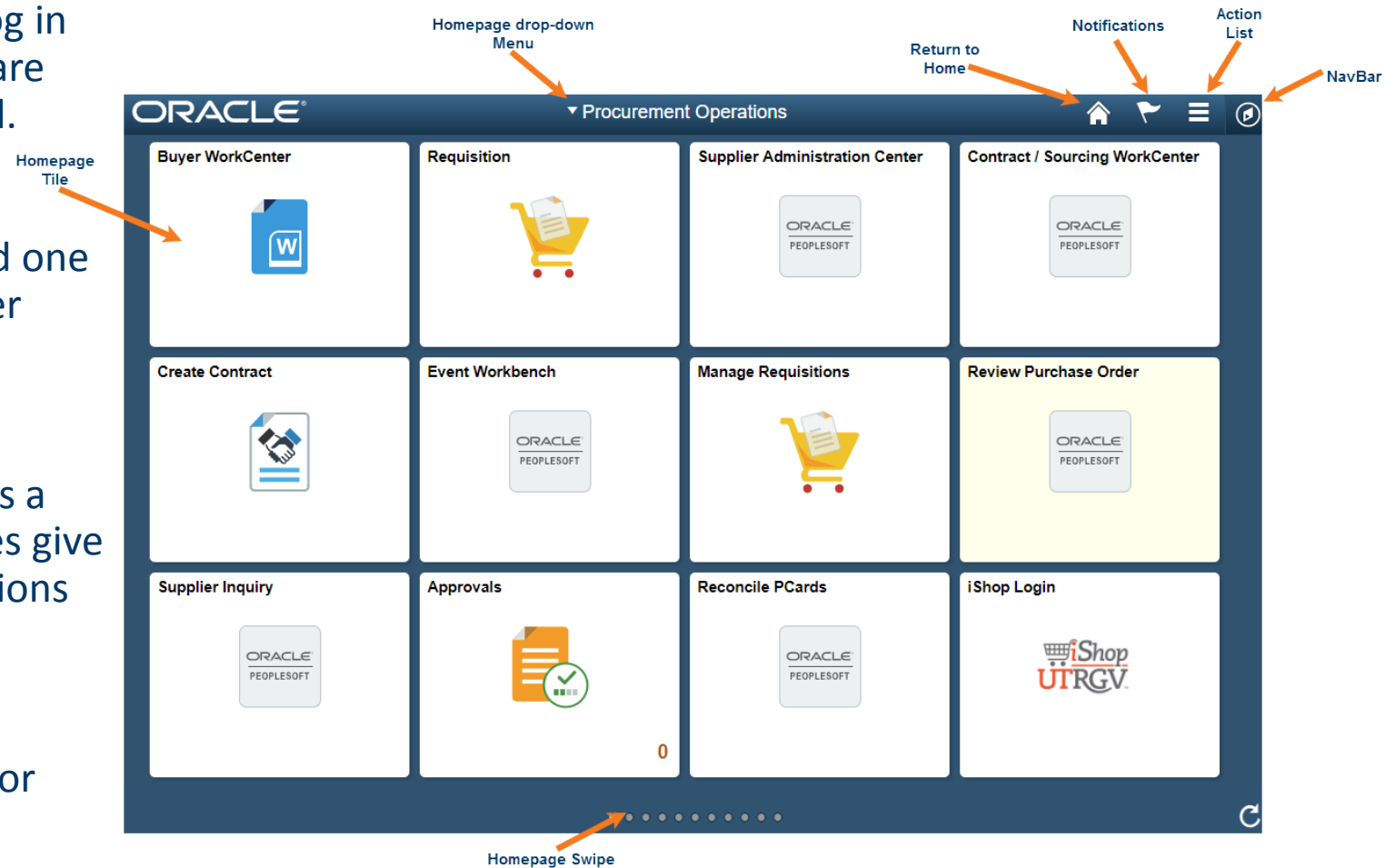
The philosophy of Fluid navigation focuses on:

- Multiple paths for users to access functionality
- Users choosing the path that is most effective for them
- Use of Related actions to make navigation work across all paths

The Classic menu navigation uses a breadcrumb menu with a deep hierarchy. Fluid navigation uses Homepages and Tiles as the starting point for navigation to both Fluid and Classic pages. Further categorization and navigation to Fluid and Classic transactions is achieved through the use of Fluid Application Start pages and Fluid Application Homepages.

Homepage

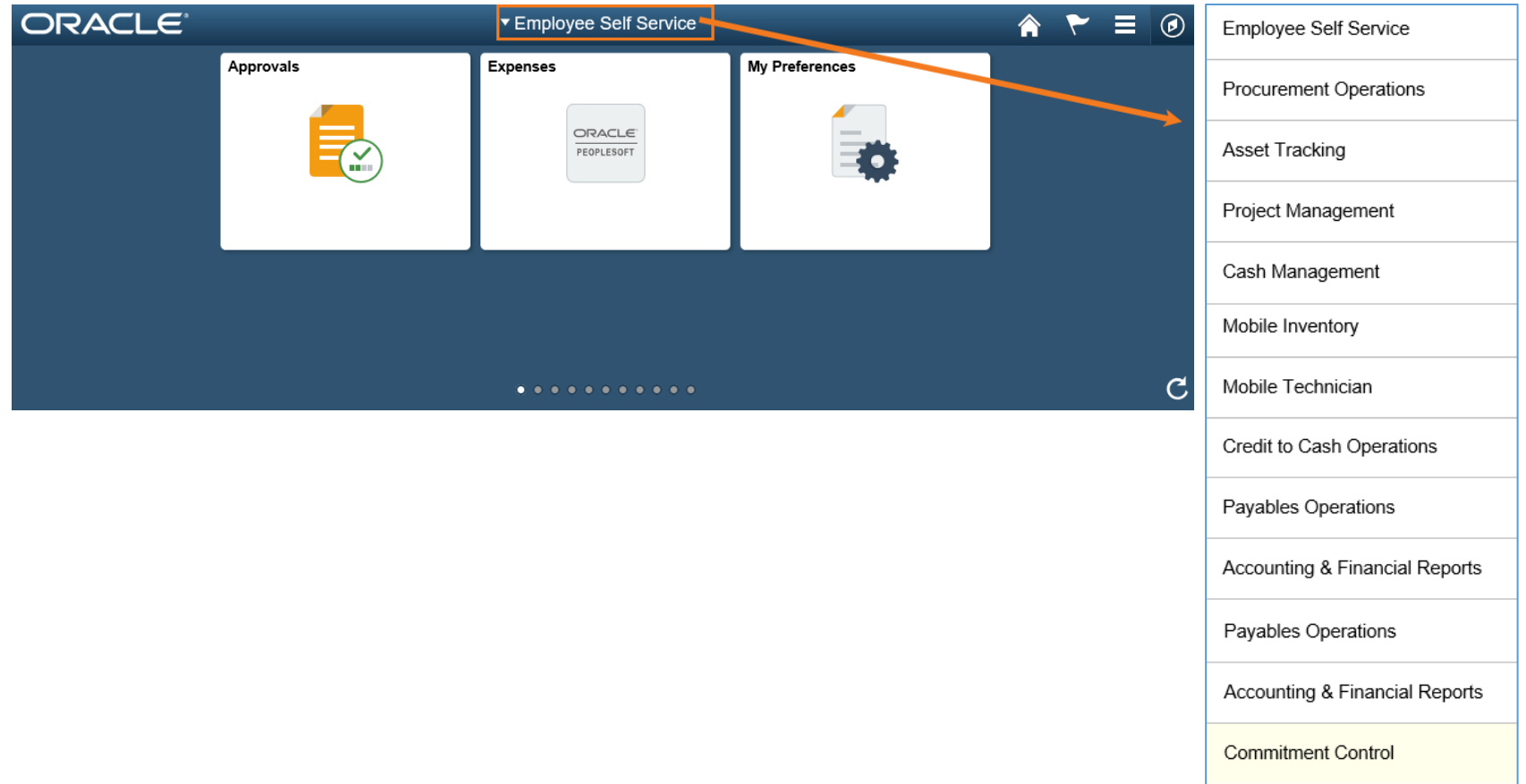
- A Fluid homepage appears when you log in to the PeopleSoft system. Homepages are the starting point for navigation in Fluid.
- A user can have several homepages and one default homepage that is displayed after login.
- The homepage has tiles that allow users a quick way to perform routine tasks. Tiles give users direct access to targeted transactions areas within the system.
- Homepages may have role based titles or function based titles.



Homepage Dropdown

The Fluid Menu dropdown has a list of several homepages from which you can choose.

Each homepage consist of a collection of tiles that show information to the end-user, and enable an easy way to navigate around the system.

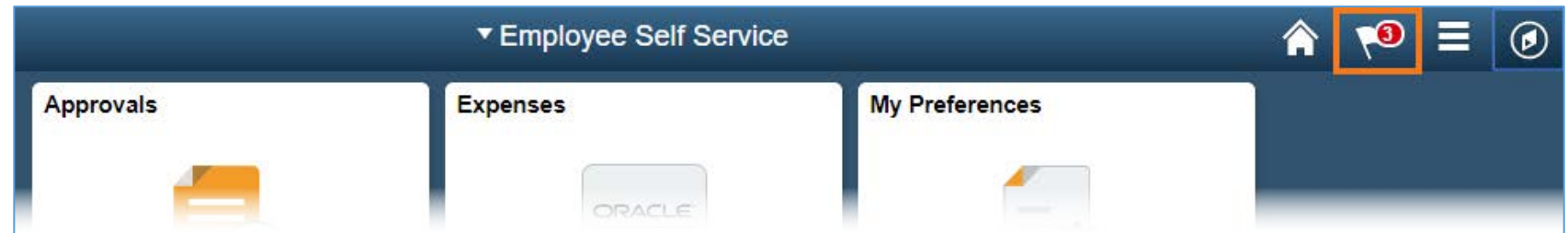


Notifications

There are two types of notifications:

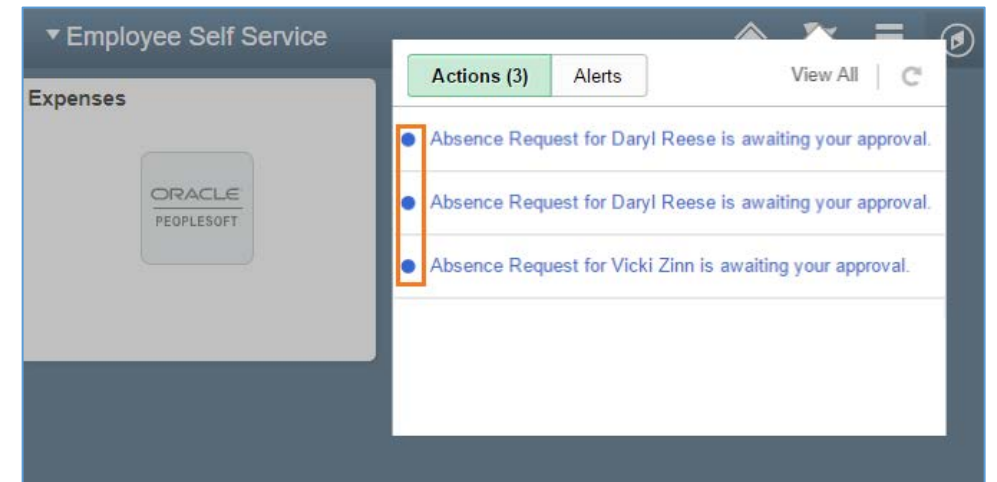
- Actions: Allow transfer to a transaction where some action may be performed.
- Alerts: An informational message that may be deleted by the user. A transfer to the transaction may also be performed, but is optional.

The Notifications will display a badge with a count on the flag icon to notify the user of any new Actions or Alerts. The example shows a count of 3 Notifications:



Tapping the flag icon opens a modal window that displays Actions and Alerts.

Actions or Alerts that have not been viewed yet will have a blue circle next to them



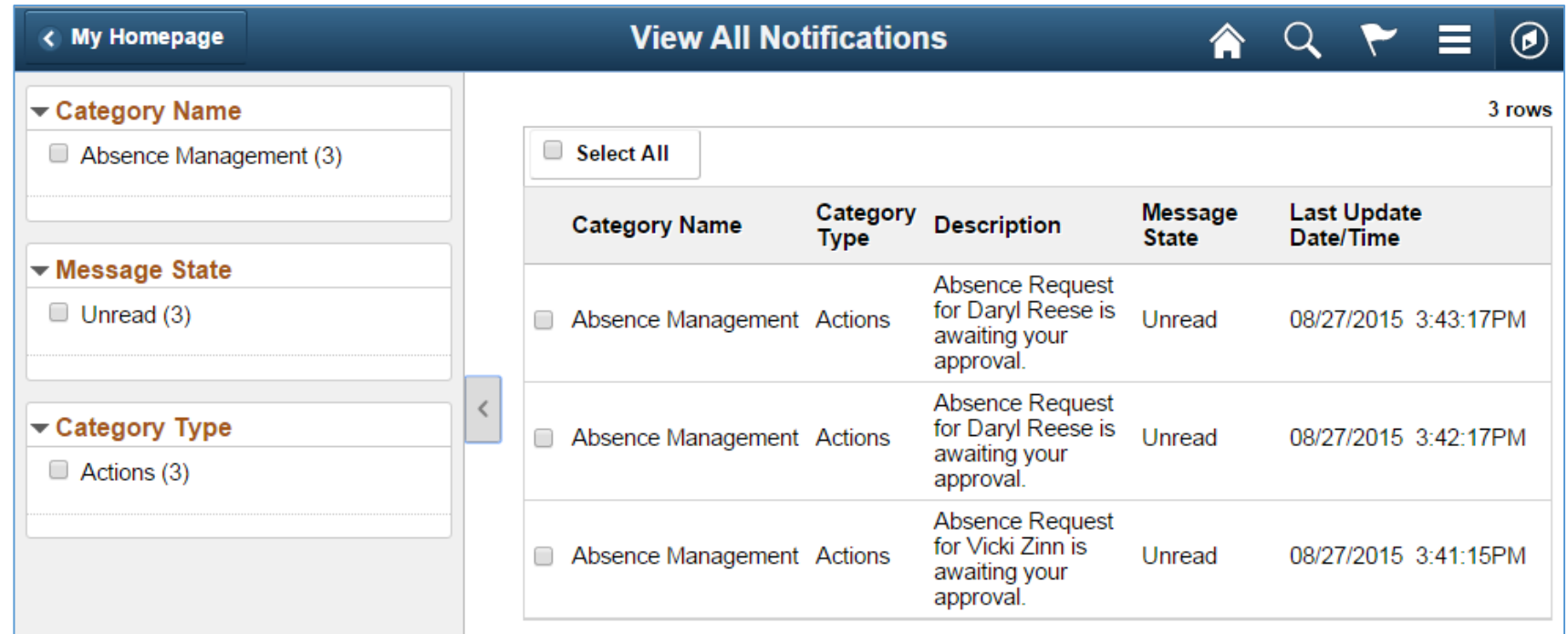
Notifications Continued

Tap an individual Action or Alert to transfer to the transaction.

Alternatively, tap the View All link to see a detailed list of the transactions:



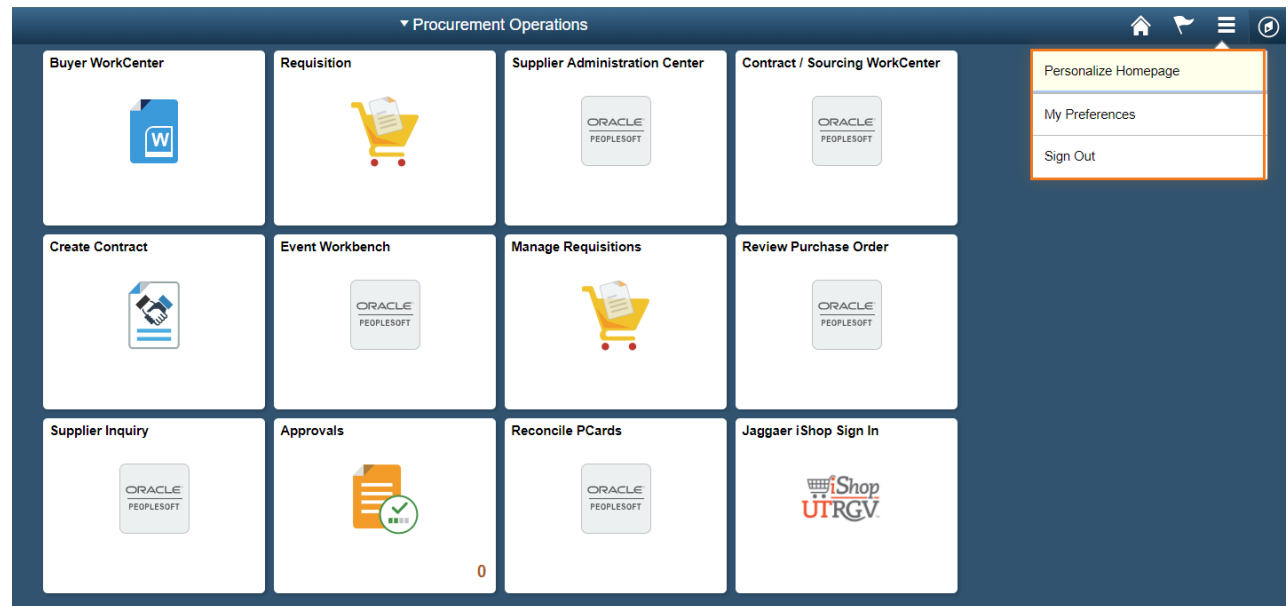
After tapping the View All, the View All Notifications window will open:



Action List

The Actions List icon gives options for personalization, viewing preferences, or signing out of PeopleSoft. If accessing the Actions List from a page other than a homepage, there will also be additional menu items including Add to Homepage, Add to NavBar, and Add to Favorites.

1. From a Homepage, click the Actions List icon.
2. Select an item from the menu:
 - a) Personalize Homepage – add/edit homepages or add/edit tiles on a homepage (see Personalizing Homepages for details)
 - b) My Preferences – edit general settings
 - c) Sign Out – securely logs user out of PeopleSoft



Action List

1. From a page in PeopleSoft (not the homepage), click the Actions List icon.

2. Select an item from the menu:

- Add to Homepage – add the current location to one of your homepages
- Add to NavBar – add the current page to the NavBar
- Add to Favorites – add the current page to My Links (preferred method to save most visited pages) My Links can be accessed from the NavBar

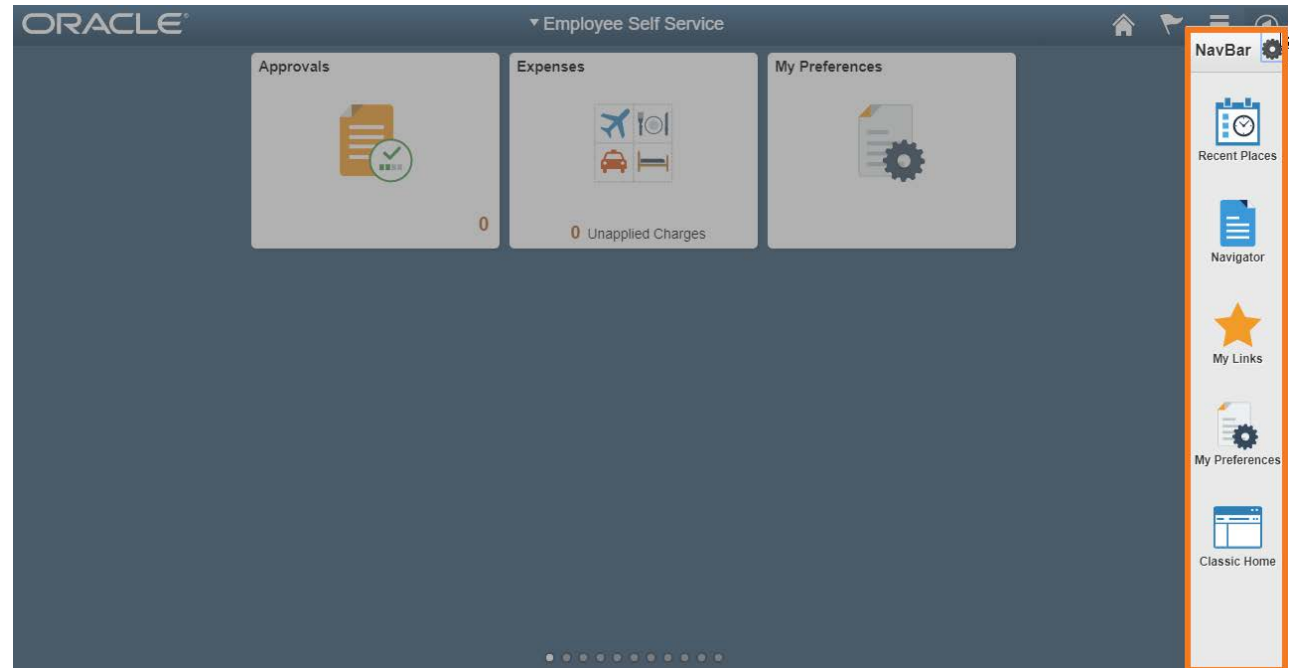
The screenshot displays the 'Event Workbench' interface in PeopleSoft. The top navigation bar includes 'Procurement Operations' and 'Event Workbench'. Below the navigation bar, there's a 'Search Criteria' section with various input fields for filtering events, such as Business Unit, Event ID, From Start Date, To Start Date, Sort With, etc. A 'Search' button is present. Below the search criteria is a 'Legend' section. The main part of the interface is a table of 'Search Results' with columns for Event ID, Name, Format, Type, Unit, and Status. The table lists several events, some marked as 'Event Completed'. On the right side of the interface, there is a vertical menu with options: 'Add To Homepage', 'Add To NavBar', 'Add To Favorites', 'My Preferences', and 'Sign out'. The 'Add To Homepage' option is highlighted with a yellow background.

Event ID	Name	Format	Type	Unit	Status
0000000010	test Event for col...	Buy	RFX	UTRGV	Collaborating Event
0000000008	Demo 01-09-18	Buy	RFX	UTRGV	Event Completed
0000000001	Still Testing	Buy	RFX	UTRGV	Collaborating Event
0000000002	First Sourcing Dev...	Buy	RFX	UTRGV	Event Completed
0000000004	test Collaboration...	Buy	RFX	UTRGV	Collaborating Event
0000000003	TESTRT1	Buy	RFX	UTRGV	Collaborating Event
0000000006	Contract for Boots...	Buy	RFX	UTRGV	Event Completed
0000000007	The Other Contract...	Buy	RFX	UTRGV	Event Completed
0000000005	Purchase Computer ...	Buy	RFX	UTRGV	Event Completed
TEST01	BPG TEST	Buy	RFX	UTRGV	Pending Award

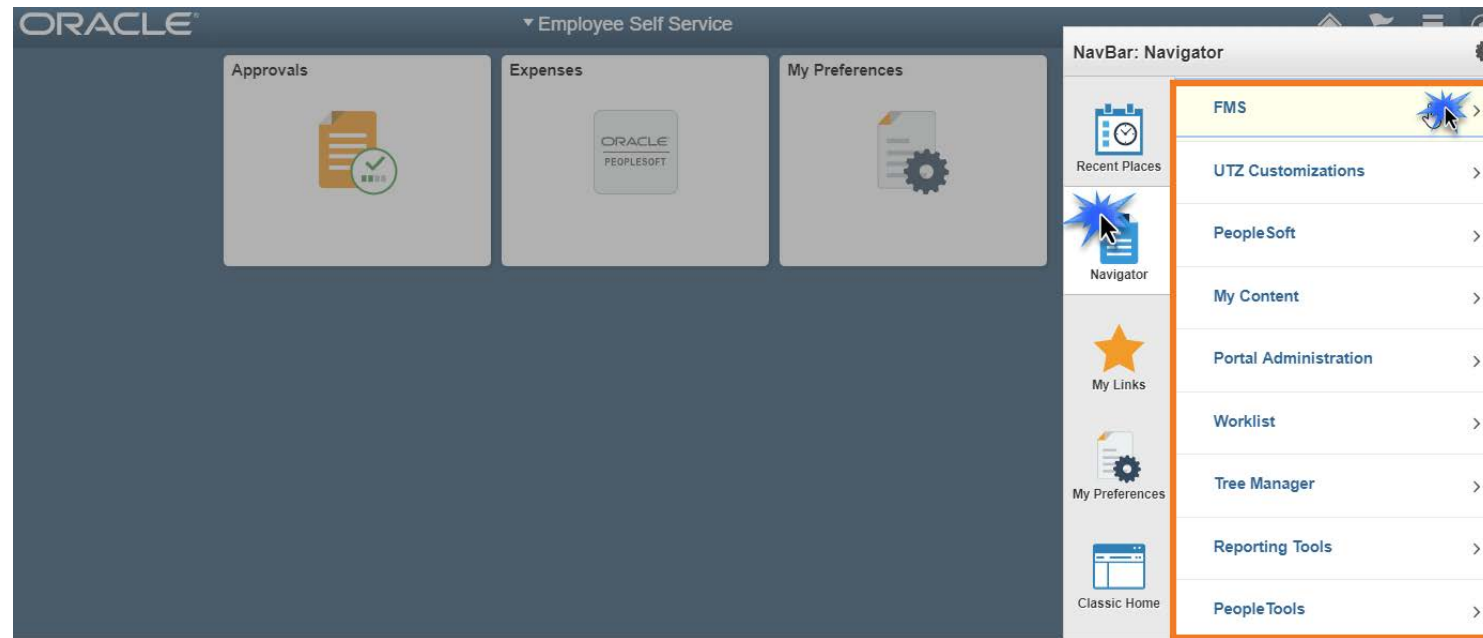
NavBar

The NavBar contains items to access Recent Places, My Links, Navigator, Preferences and Classic Home.

- **Recent Places** – lists the five last visited areas within PeopleSoft. Users can navigate back to pages from this list.
- **Navigator** – features the navigational items seen from the Main Menu drop down or Classic Home, but offers a different navigation experience.
- **My Links** – lists pages that have been saved as favorites.
- **My Preferences** – enables end users to personalize their workspaces. i.e., navigation and display
- **Classic Home** – Displays the classic PeopleSoft menu with breadcrumbs and hierarchy. To return to the “Fluid” menus, simply click the Home button at the top of the toolbar.



Navigator Tile



To Access the Financial Components of the system in Portal, the user will need to:

1. Click the NavBar
2. Click the Navigator Tile
 - a) This will cause the Navigator to appear to the right of the NavBar tiles.
3. Click Financials
4. You will only be able to see items you have access to based on Security Roles and Levels

THANK YOU!

The University of Texas
Rio Grande ValleyTM

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