



**State of Wisconsin**  
**Department of Administration**

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**Payroll & Benefits Core User Fluid Job  
Aid**

*(Released 5-1-19)*

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## DEFINITIONS

1. **Homepage:** a landing page with a collection of Tiles or Dashboards. There are 3 Homepages:
  - a. Employee Self Service – all employees will have this Homepage
  - b. Manager Self Service – only those who approve time will have this Homepage. Must have one of the following security roles to have this Homepage:
    - i. AM\_SUPERVISOR
    - ii. TL\_MANAGER
    - iii. TL\_ADMIN\_WCS (Courts System Only)
  - c. Workforce Administrator – only those who have a core user role will have this Homepage
2. **Dashboard:** a collection of Tiles that is not a Homepage. Examples of Dashboards include:
  - a. Payroll
  - b. Benefits Administration
  - c. Annual Processing
  - d. Human Resources
3. **Tile:** located on a Homepage or Dashboard and allow users quick access to a Navigation Collection or transactional page.
4. **Navigation Collection:** a compilation of folders and pages grouped together by functionality in a Tile.
5. **WorkCenter:** used to increase the productivity of users by streamlining and simplifying their work in a central place (e.g. HR WorkCenter, Payroll/Benefits WorkCenter).

## FLUID NAVIGATION

There are several ways to navigate within Fluid:

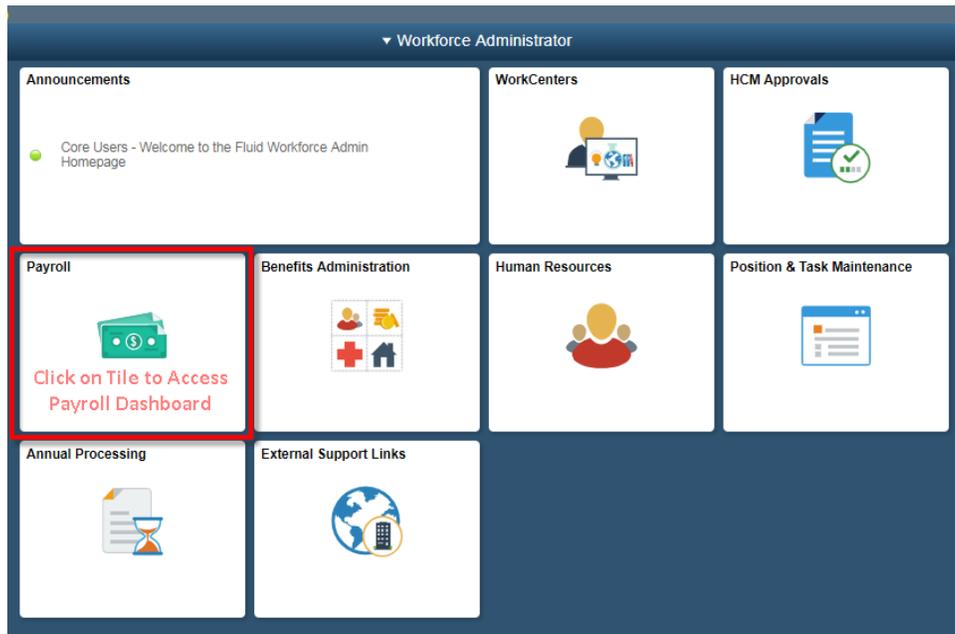
1. Dashboards, Tiles and Navigation Collections – recommended and most efficient
2. Navigator
3. My Favorites
4. WorkCenters

### ***Dashboards, Tiles and Navigation Collections***

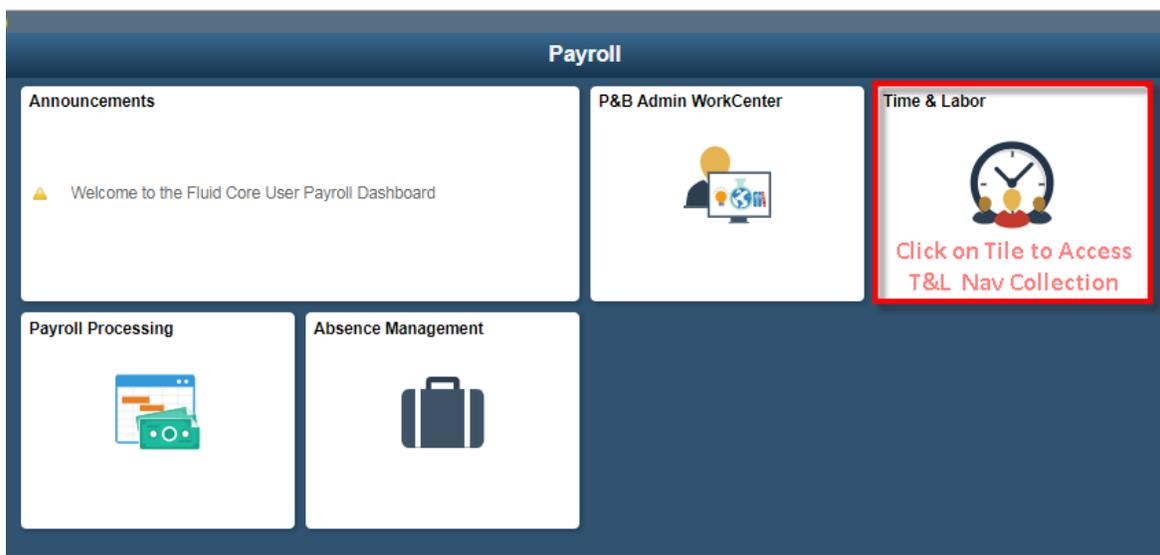
You must first select the Homepage that contains the information you need. Select the **Workforce Administrator Homepage** from the Homepage drop down menu located in the middle of the top bar to access all Core User Pages.



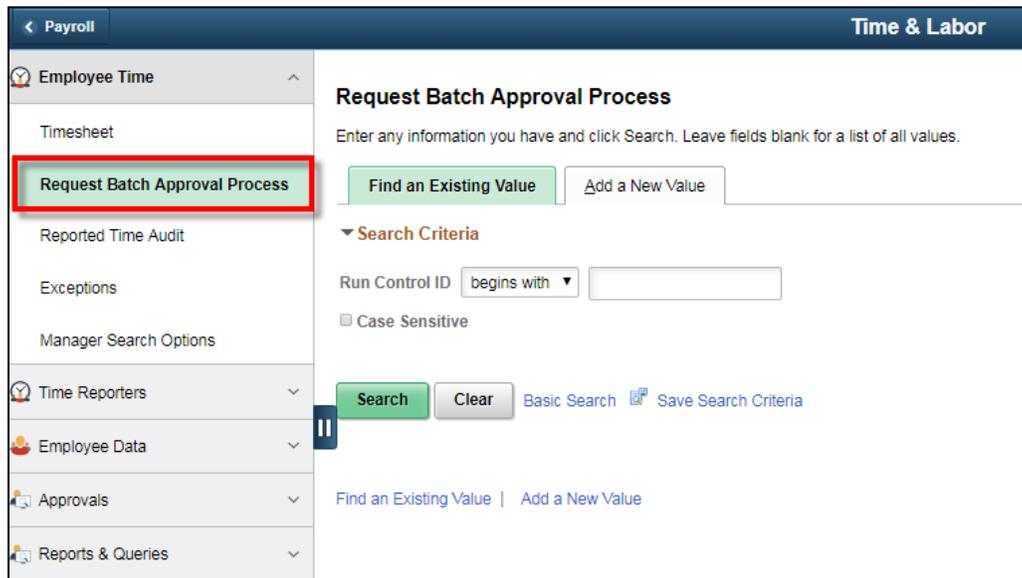
You will then select the applicable Tile to access either a Dashboard (ex. Payroll or Benefits Administration Dashboard) or a Navigation Collection (ex. Annual Processing).



Once you are on a Dashboard, click on a Tile within the Dashboard to access the Navigation Collection.

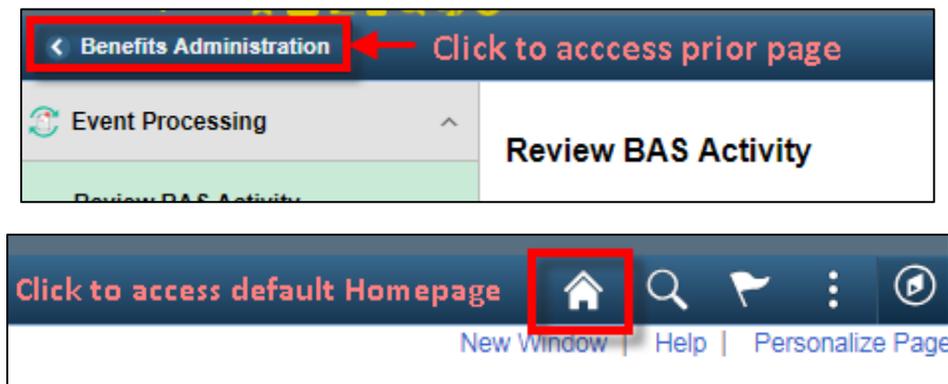


Once you are in a Navigation Collection, click on the Page within the Navigation Collection to access a specific Page.



You continue to click on the different pages within the Navigation Collection to access those pages.

To move between Tiles, Dashboards or Homepages, you can click on the name in the upper left corner of the top bar to go back to the last place you were before your current page or click the Home button to return to your default Homepage.



### Top Bar Buttons

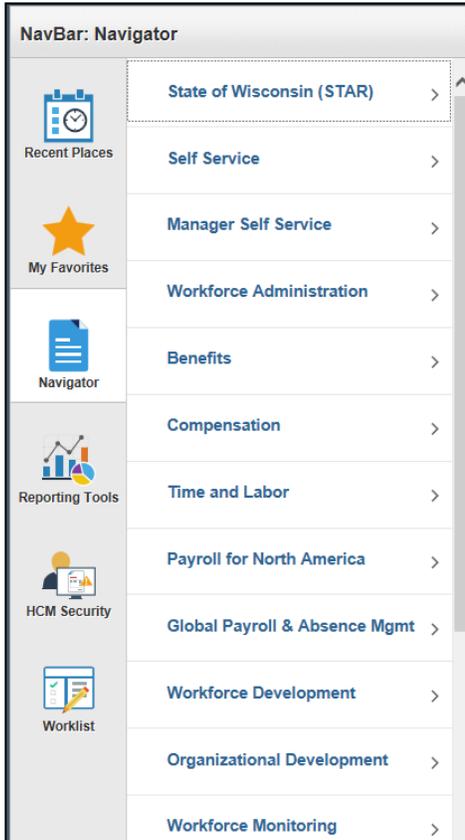
There are several buttons on the top bar of the page. The buttons that appear on the page may change based on the page you are on.

Button Name	Icon	Description
Home		<ul style="list-style-type: none"> <li>Will take you back to your default Homepage</li> <li>Default Homepage is Employee Self Service unless you change it</li> </ul>
Search		<ul style="list-style-type: none"> <li>Use to search for pages within the system</li> </ul>
Alerts & Notifications		<ul style="list-style-type: none"> <li>Will eventually be used for messages and alerts</li> <li>No information will be populated at go-live</li> </ul>

Button Name	Icon	Description
Action List		<ul style="list-style-type: none"> <li>Action List options change based on the page you are on. Options include: <ul style="list-style-type: none"> <li>Add To Favorites – will add a page to your favorites</li> <li>Personalize Homepage – set your default homepage</li> <li>Personalize Dashboard – can move tiles around on your dashboard</li> <li>My Preferences – various options can be selected here including navigation settings</li> <li>Help – contains links to Oracle reference materials</li> <li>Sign Out – signs you out of PeopleSoft</li> </ul> </li> </ul>
NavBar Reveal		<ul style="list-style-type: none"> <li>Reveals the NavBar: Navigator menu and access to classic navigation</li> </ul>

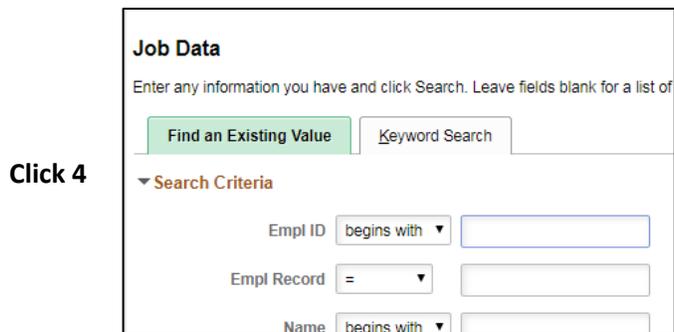
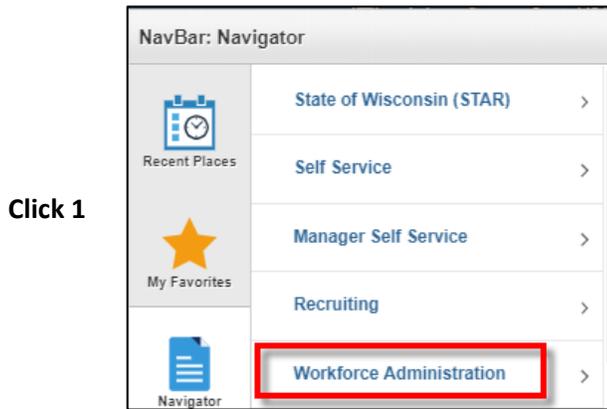
### NavBar: Navigator

Another way to navigate through the system is through items in the NavBar: Navigator.

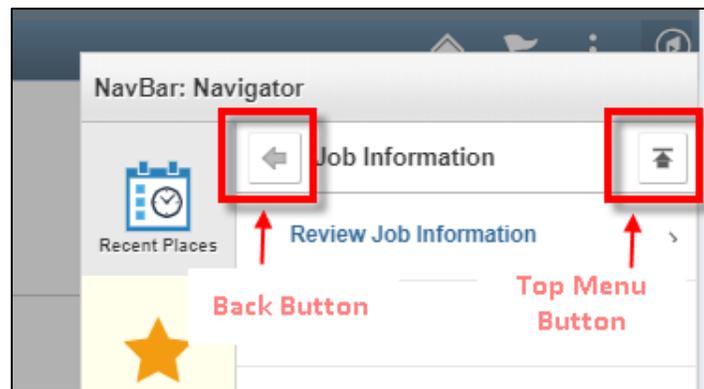


Button	Description
Recent Places	<ul style="list-style-type: none"> <li>Last 5 places you visited</li> </ul>
My Favorites	<ul style="list-style-type: none"> <li>Your Favorites – your current Favorites will move forward in to Fluid</li> <li>Can edit Favorites</li> </ul>
Navigator	<ul style="list-style-type: none"> <li>Similar to 'Main Menu' and will only display Navigation pages for which you have security</li> </ul>
Reporting Tools	<ul style="list-style-type: none"> <li>Provide quick access in a new tab to STAR Report Search, Report Manager, Query Viewer and Process Monitor</li> <li>Will open in a new tab so you can preserve the page you are on</li> </ul>
HCM Security	<ul style="list-style-type: none"> <li>Quick access to security requests and approvals (only visible if you have applicable security role)</li> </ul>
Worklist	<ul style="list-style-type: none"> <li>Quick access to Worklist (for those who use it)</li> </ul>

When you access pages through the Navigator Menu, there are no bread crumbs. You click through the menu levels to access the page.



To move to another page through the Navigator, you then click the NavBar Reveal button again and either select the back button to go back up through the menu or click the Top Menu button to bring you back to the main menu.



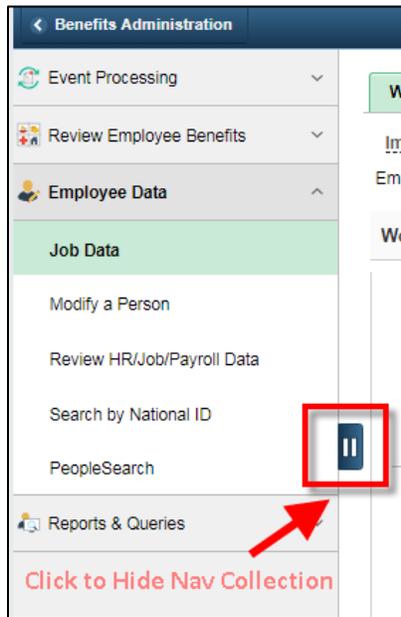
### ***WorkCenters***

Both the Human Resources and Payroll & Benefits WorkCenters will be available in Fluid. Click on the WorkCenters Tile from the Workforce Administrator Homepage to access.

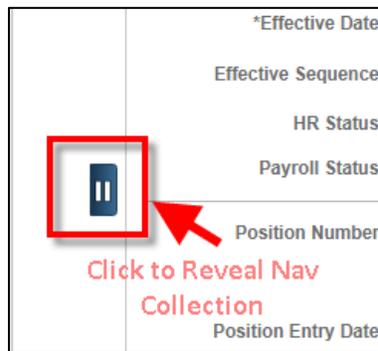
When you click on a link to open a page within the WorkCenter, it will open in a new tab.

### ***Hiding the Navigation Collection***

If you want more room to view a page on your screen, you can hide the Navigation Collection by clicking the blue box to the right of the Navigation Collection.



When you want to access the Navigation Collection again, click on the blue box again.

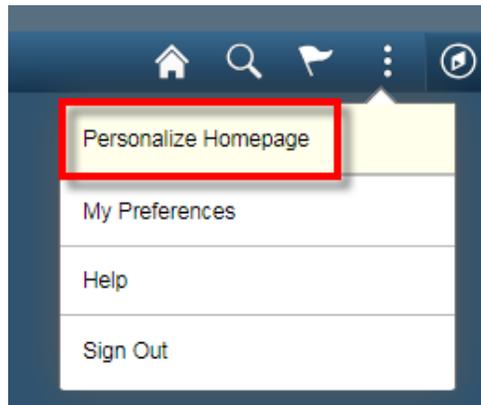


### ***Changing Your Default Homepage***

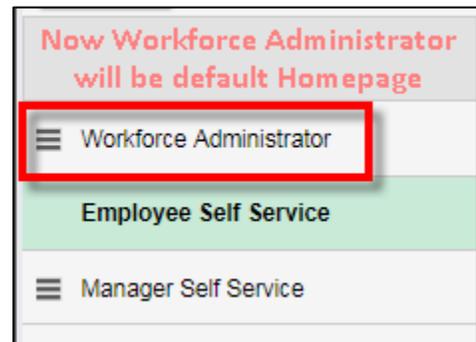
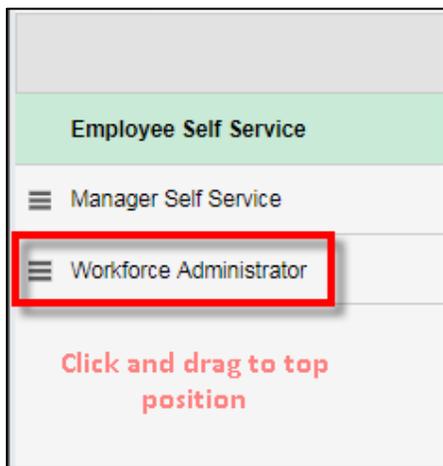
1. From one of the Homepages, select the Action List from the Top Bar



2. Select Personalize Homepage



3. Click on the Homepage that you want to be your default Homepage and drag it to the top of the Homepage list.



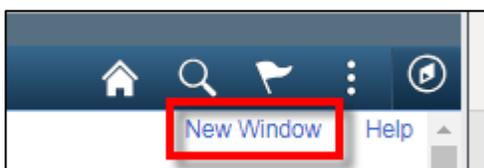
4. Click Save in the upper right corner of the page.

### ***Moving Tiles on a Homepage or Dashboard***

1. Click on the Tile that you want to move and drag it to its new position (an orange border will outline the Tile as you move it)
2. Once it is in position, drop it in the spot you want it on the page

### ***Opening a New Window***

1. Click on **New Window** in the upper right corner to open a new window.

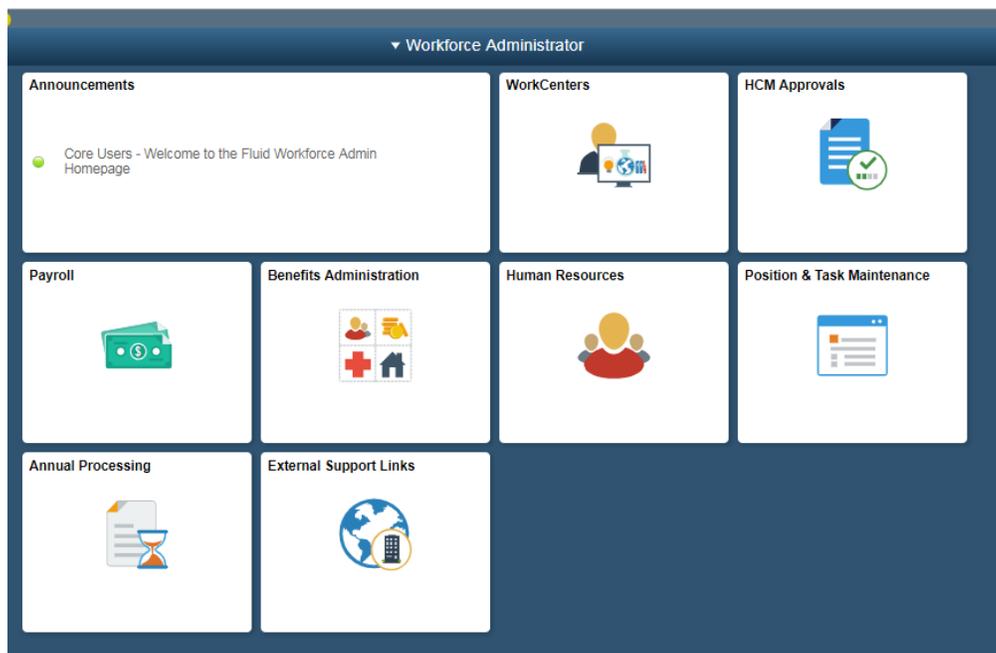


2. The page that you were on will open in the new window; however, if you were accessing that page via a Navigation Collection, the Navigation Collection will NOT appear on that page in the new window. You will

have to re-access the page through the Navigation Collection again in the new window to have the Navigation Collection appear on the page.

## WORKFORCE ADMINISTRATOR HOMEPAGE

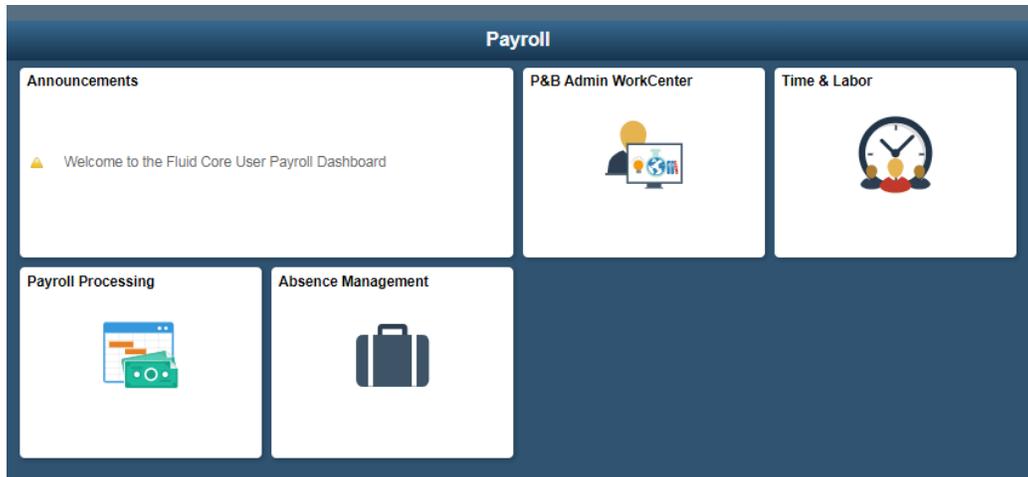
Below is an image of all possible Tiles on the Workforce Administrator Homepage. The ability to view and access Tiles is based on your security.



Tile	Description
WorkCenters	<ul style="list-style-type: none"> <li>• Access to the HR and P&amp;B WorkCenters</li> <li>• Open to P&amp;B WorkCenter by default</li> </ul>
HCM Approvals	<ul style="list-style-type: none"> <li>• Quick access to Batch Approval Process and Worklist pages</li> </ul>
Payroll	<ul style="list-style-type: none"> <li>• Access to Payroll Dashboard</li> </ul>
Benefits Administration	<ul style="list-style-type: none"> <li>• Access to Benefits Administration Dashboard</li> </ul>
Human Resources	<ul style="list-style-type: none"> <li>• Access to the Human Resources Dashboard</li> </ul>
Position & Task Maintenance	<ul style="list-style-type: none"> <li>• Access to Position &amp; Task Maintenance Navigation Collection</li> </ul>
Annual Processing	<ul style="list-style-type: none"> <li>• Access to Annual Processing Navigation Collection</li> <li>• Includes ICI Annual/Deferred, ACA, W-2 Information and Sabbatical Processing</li> </ul>
External Support Links	<ul style="list-style-type: none"> <li>• Direct links to websites that support HR, Payroll and Benefits Staff</li> <li>• Includes direct links to JIRA, DPM and ETF resources</li> <li>• All links open in a new tab</li> </ul>

## PAYROLL DASHBOARD AND TILES

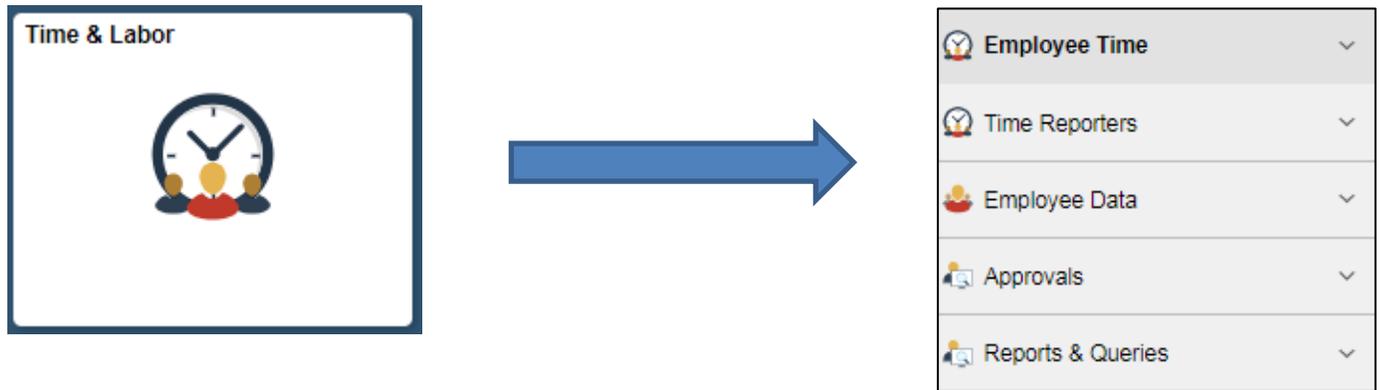
Below is an image of all possible Tiles on the Payroll Dashboard. The ability to view and access Tiles is based on your security.



Tile	Description
P&B Admin WorkCenter	<ul style="list-style-type: none"> <li>• Direct access to P&amp;B WorkCenter</li> </ul>
Time & Labor	<ul style="list-style-type: none"> <li>• Access to Time &amp; Labor Navigation Collection</li> <li>• Includes all pages needed related to Timesheets, Time Reporting Data, Approvals and Delegation</li> <li>• Includes Employee data pages and applicable reports and queries</li> </ul>
Payroll Processing	<ul style="list-style-type: none"> <li>• Access to Payroll Processing Navigation Collection</li> <li>• Includes all pages needed for payroll processing, including access to pay data, POTTs, W-2 information and balances</li> <li>• Includes Employee data pages and applicable reports and queries</li> </ul>
Absence Management	<ul style="list-style-type: none"> <li>• Access to Absence Management Navigation Collection</li> <li>• Includes all pages needed for absence management, including absence entry and review and leave donations</li> <li>• Includes Employee data pages and applicable reports and queries</li> </ul>

## Time and Labor Tile and Navigation Collection

Below is an image of all pages in the Time and Labor Tile. Only pages for which you have access will appear in the Navigation Collection

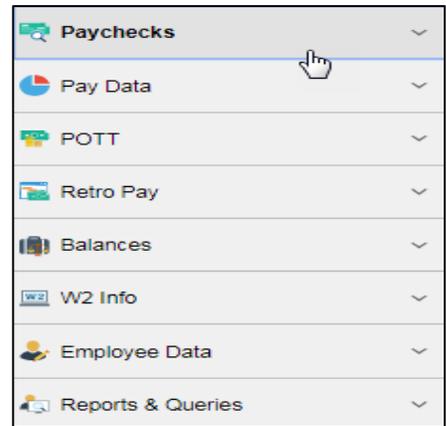
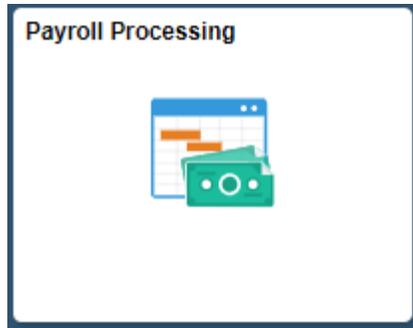


### All Pages within the Navigation Collection

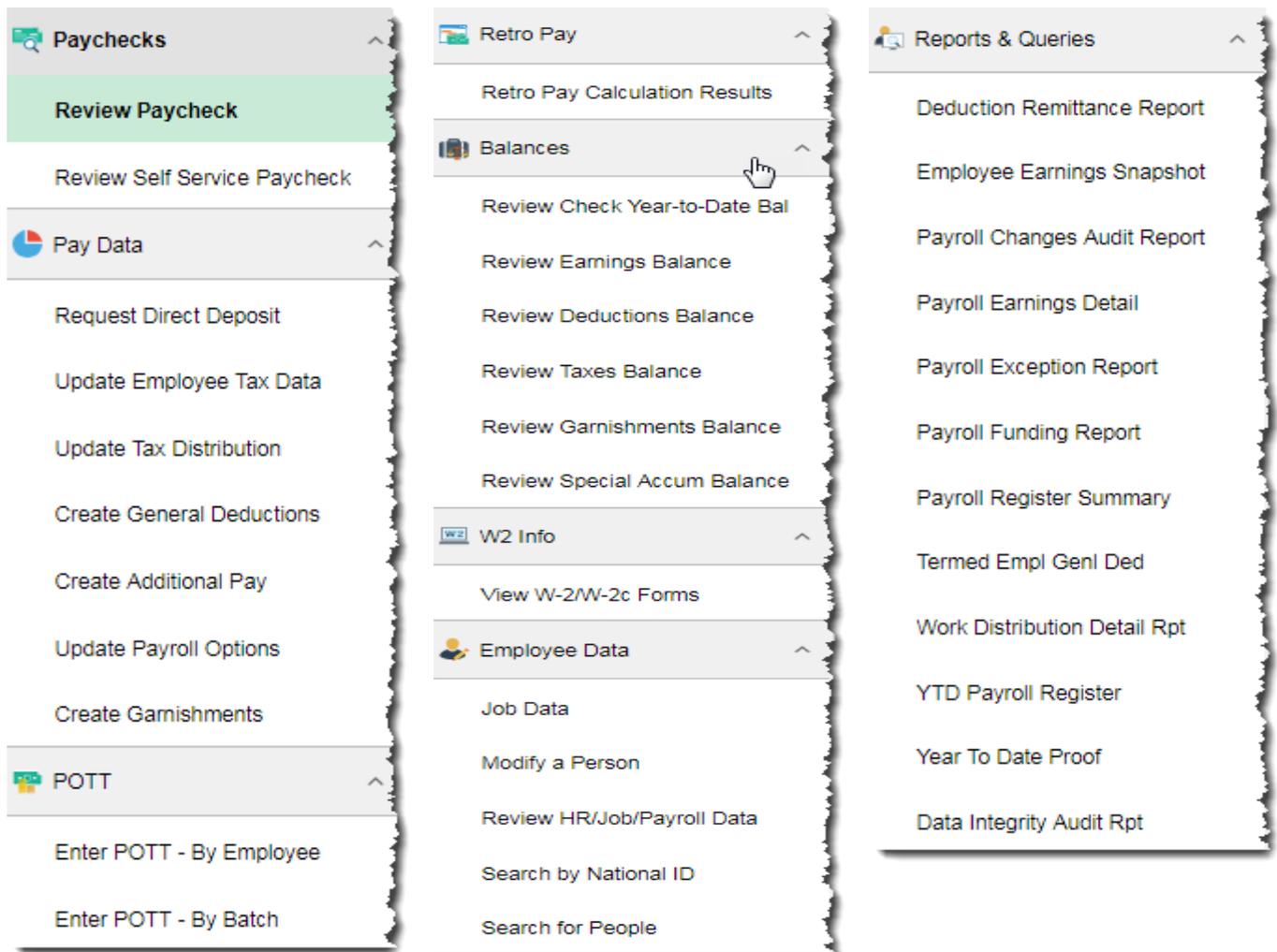
This section displays the detailed content of three navigation collection items, each shown in a vertical panel with a header and a list of sub-items. The panels are: 1) 'Employee Time' (clock icon) with sub-items: Timesheet, Request Batch Approval Process, Reported Time Audit, Exceptions, and Manager Search Options. 2) 'Employee Data' (person icon) with sub-items: Job Data, Modify a Person, Review HR/Job/Payroll Data, Search by National ID, and Search for People. 3) 'Approvals' (document icon) with sub-items: Add Delegation Request, Administer Delegation, Reports & Queries (with a dropdown arrow), LOA and Layoff Report, LTE Hours Tracking, TL Comp Plan Payout, Payable Time TRC Register, and DDS Reported Time for SSA.

## Payroll Processing Tile and Navigation Collection

Below is an image of all pages in the Payroll Processing Tile. Only pages for which you have access will appear in the Navigation Collection

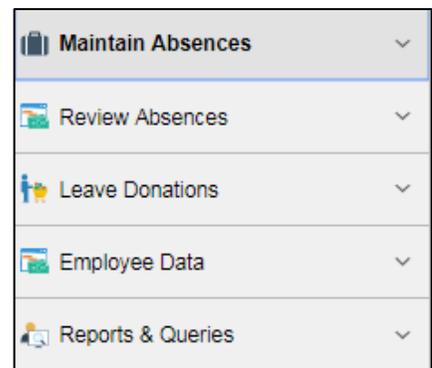


### All Pages within the Navigation Collection

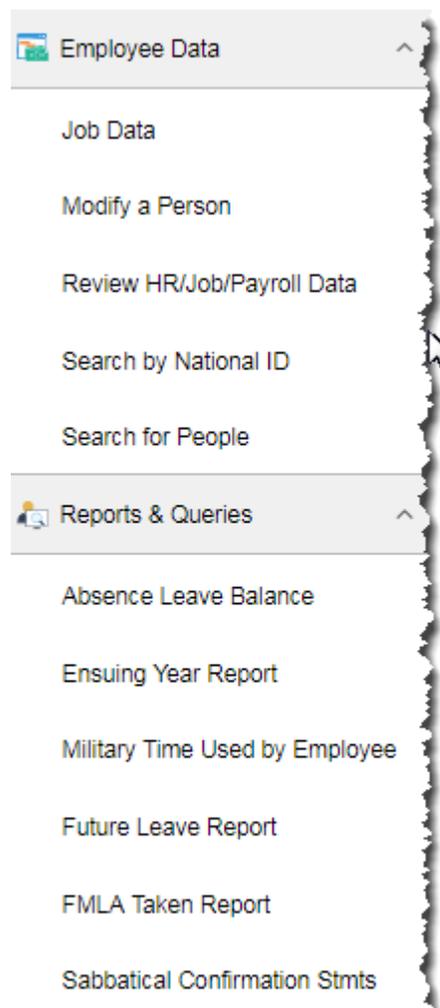
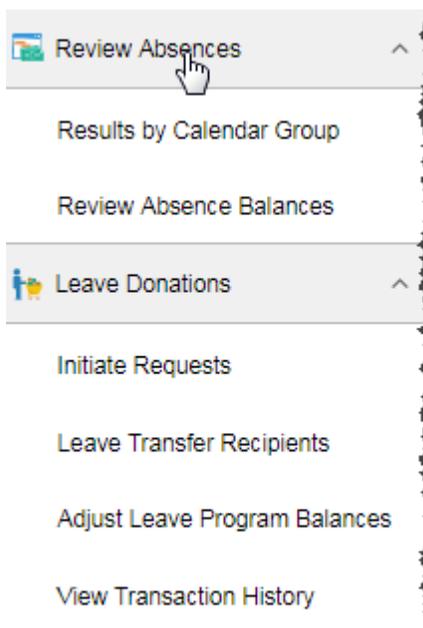
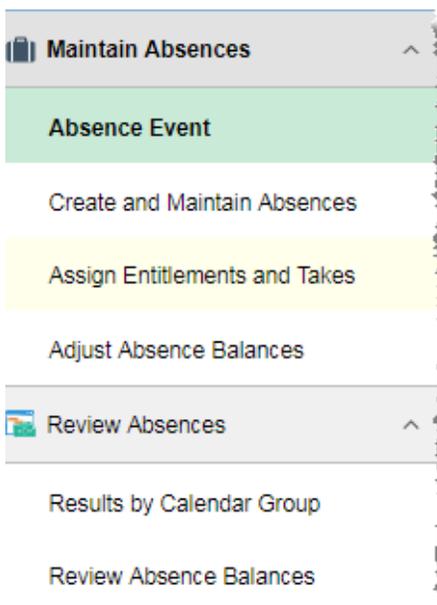


## Absence Management Tile and Navigation Collection

Below is an image of all pages in Absence Management Tile. Only pages for which you have access will appear in the Navigation Collection

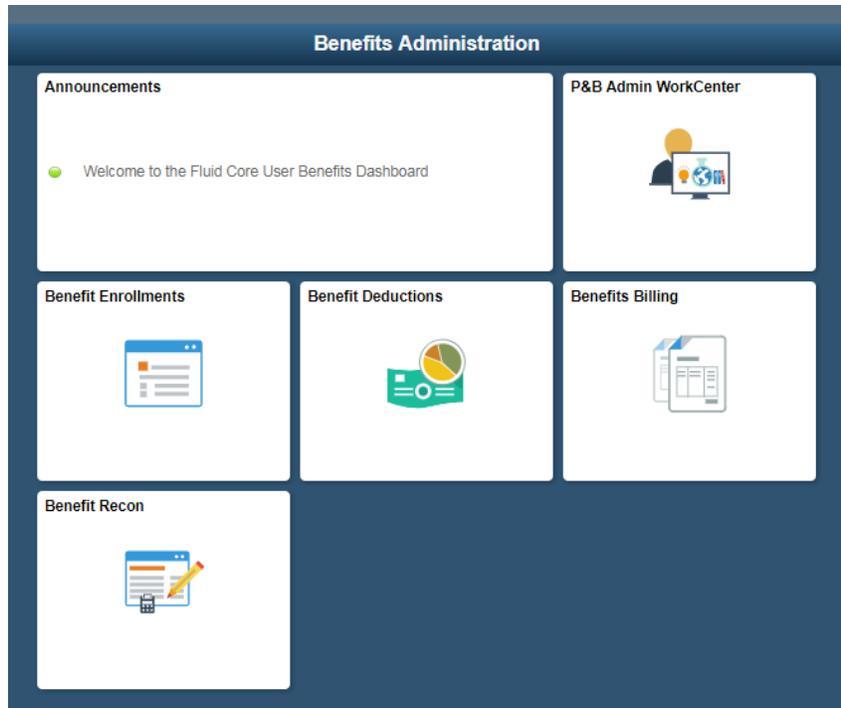


### All Pages within the Navigation Collection



## BENEFITS ADMINISTRATION DASHBOARD AND TILES

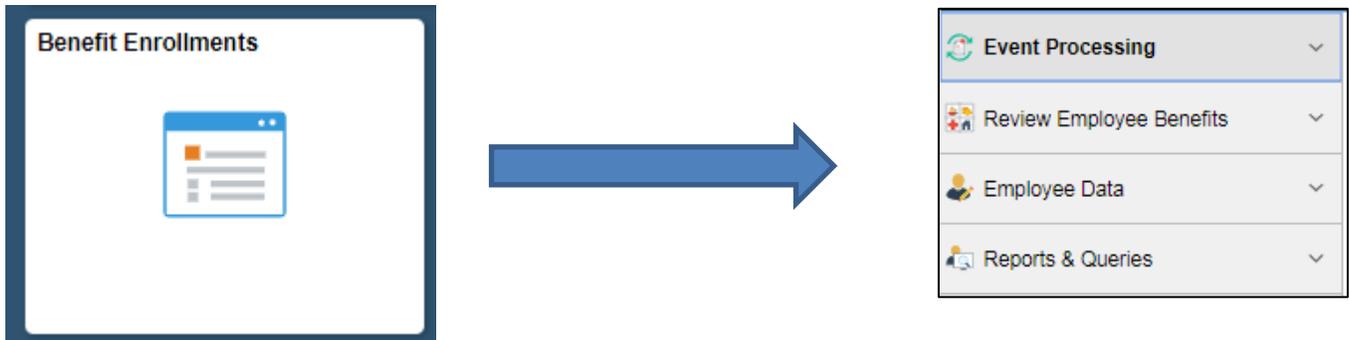
Below is an image of all possible Tiles on the Benefits Administration Dashboard. The ability to view and access Tiles is based on your security.



Tile	Description
P&B Admin WorkCenter	<ul style="list-style-type: none"> <li>• Direct access to P&amp;B WorkCenter</li> </ul>
Benefit Enrollments	<ul style="list-style-type: none"> <li>• Access to Benefit Enrollment Navigation Collection</li> <li>• Includes all pages needed related to enter and review benefits, dependents and ABBRs</li> <li>• Includes Employee data pages and applicable reports and queries</li> </ul>
Benefit Deductions	<ul style="list-style-type: none"> <li>• Access to Benefit Deductions Navigation Collection</li> <li>• Includes access to pay check, retro and arrears, POTT, benefit flags, general deductions, additional pay and balances</li> <li>• Includes Employee data pages and applicable reports and queries</li> </ul>
Benefits Billing	<ul style="list-style-type: none"> <li>• Access to Benefits Billing Navigation Collection</li> <li>• Includes all pages needed for managing benefits billing, as well as access to POTT, retro and arrears</li> <li>• Includes Employee data pages and applicable reports and queries</li> </ul>
Benefit Recon	<ul style="list-style-type: none"> <li>• Access to Benefit Recon Navigation Collection</li> <li>• Includes all pages to manage benefit recon, as well as access to benefit enrollments, benefit deductions and benefits billing</li> <li>• Includes Employee data pages and applicable reports and queries</li> </ul>

## Benefit Enrollment Tile and Navigation Collection

Below is an image of all pages in the Benefit Enrollment Tile. Only pages for which you have access will appear in the Navigation Collection.

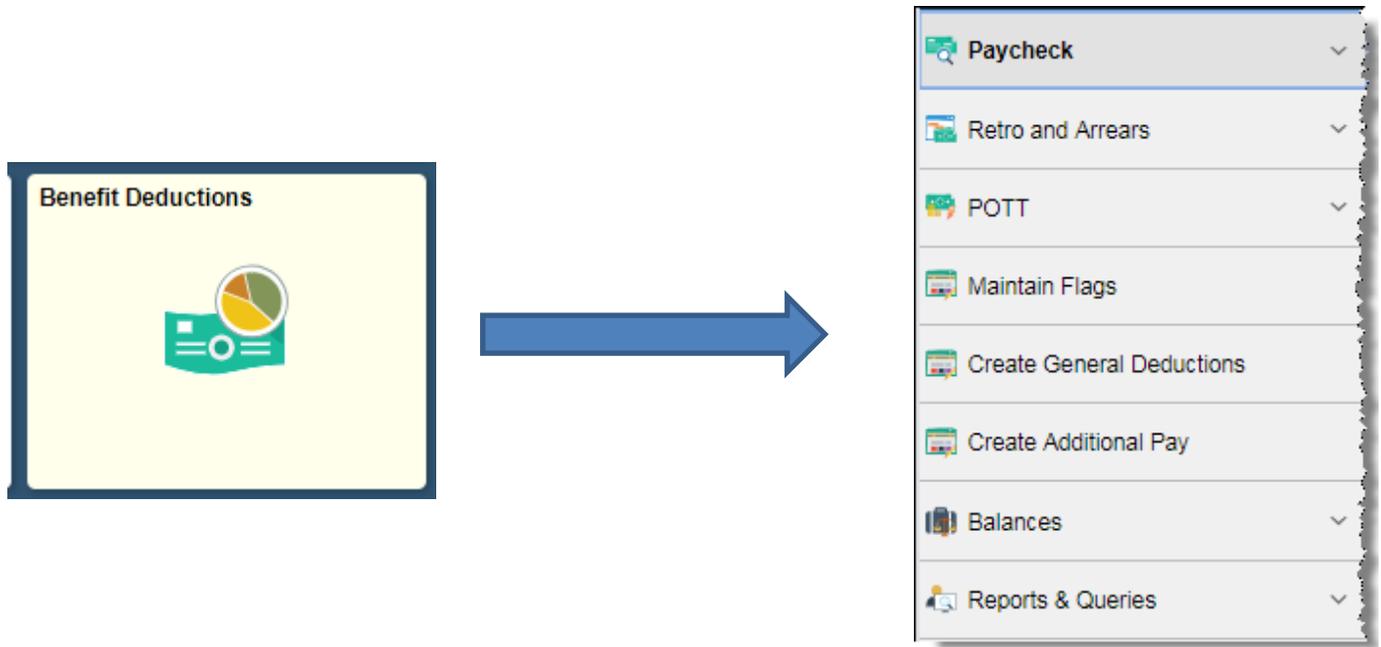


### All Pages within the Navigation Collection

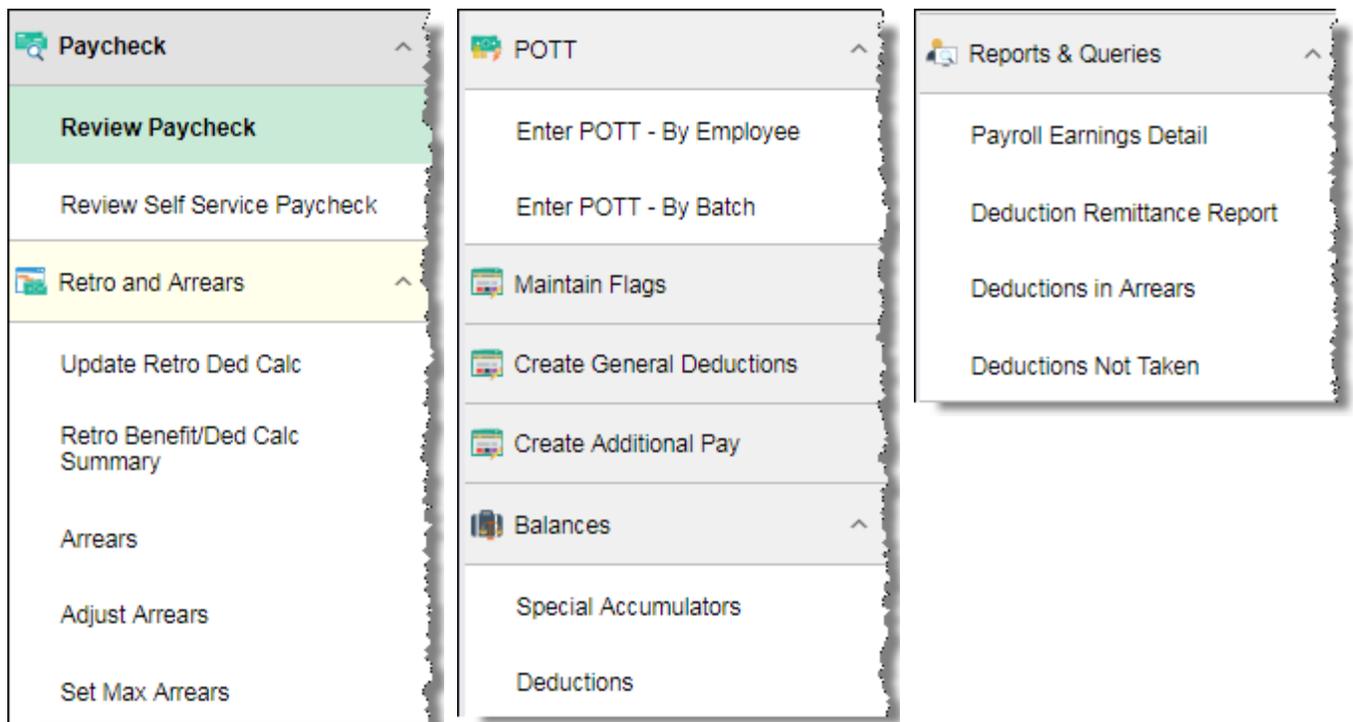
The diagram shows three vertical panels, each representing the expanded content of a navigation collection item. The first panel is titled 'Event Processing' and contains the following sub-items: 'Review BAS Activity', 'Perform Election Entry', 'Update Dependent/Beneficiary', 'Review ABBRs', 'Update ABBRs', 'Maintain Flags', 'Update Event Status', and 'Employee Event Detail'. The second panel is titled 'Review Employee Benefits' and contains the following sub-items: 'Current Benefits Summary', 'Review ABBRs', 'Update Dependent/Beneficiary', 'Health Benefits', 'Life and AD/D Benefits', 'Disability Benefits', 'Simple Benefits', 'Spending Accounts', 'Savings Plans', 'Retirement Plans', 'Create Additional Pay', 'Review Paycheck', and 'Review Self Service Paycheck'. The third panel is titled 'Employee Data' and contains the following sub-items: 'Job Data', 'Modify a Person', 'Review HR/Job/Payroll Data', 'Search by National ID', 'PeopleSearch', and 'WRS Tracking Report'.

## Benefit Deductions Tile and Navigation Collection

Below is an image of all pages in the Benefit Deductions Tile. Only pages for which you have access will appear in the Navigation Collection.



### All Pages within the Navigation Collection



## Benefits Billing Tile and Navigation Collection

Below is an image of all pages in the Benefits Billing Tile. Only pages for which you have access will appear in the Navigation Collection.



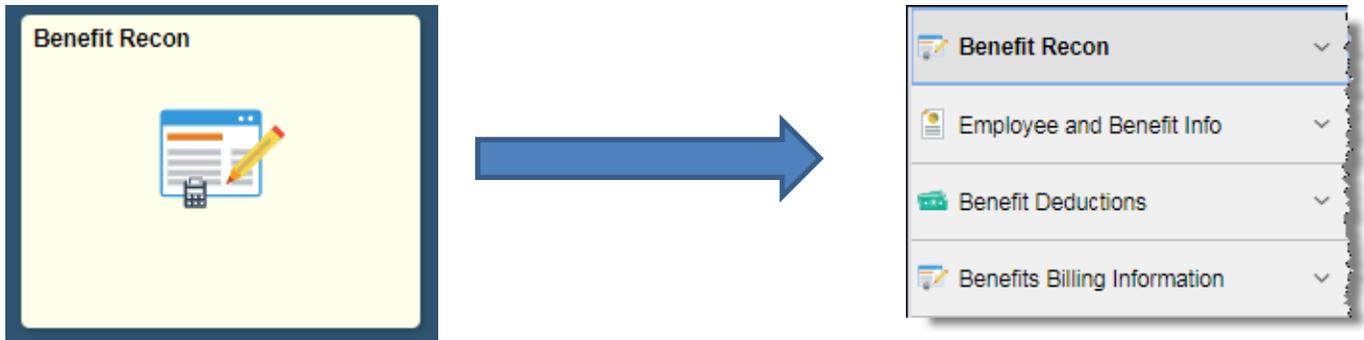
### All Pages within the Navigation Collection

This section displays three panels showing the expanded content of the navigation collection items. Each panel has a header with the item name and a dropdown arrow, and a list of sub-items below it.

- Benefits Billing** (document icon):
  - Enroll in Billing
  - Review Employee Balances
  - Allocate Payments to Charges
  - Review Payment/Details
  - Adjust Payments
  - Adjust Charges
  - Enter Manual Charges
  - Review Adjustment Summary
  - Benefits Billing Audit Report
- Review Employee Benefits** (group of people icon):
  - Current Benefits Summary
  - Health Benefits
  - Life and AD/D Benefits
  - Disability Benefits
  - Employee Data
  - Job Data
  - Modify a Person
  - Review Paycheck
  - Review Self Service Paycheck
- POTT** (calendar icon):
  - Enter POTT - By Employee
  - Enter POTT - By Batch
  - Retro and Arrears
    - Update Retro Ded Calc
    - Arrears
    - Adjust Arrears
    - Set Max Arrears
  - Reports and Queries
    - Benefits Billing Report

## Benefit Recon Tile and Navigation Collection

Below is an image of all pages in the Benefit Recon Tile. Only pages for which you have access will appear in the Navigation Collection.



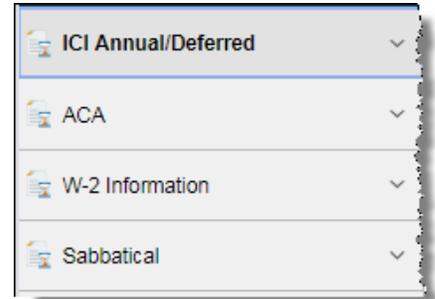
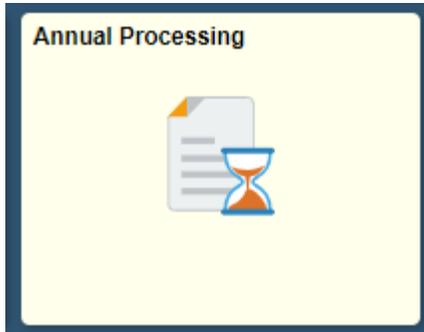
### All Pages within the Navigation Collection

This section displays three panels showing the expanded navigation collection for each item in the main navigation collection. Each panel has a header with the item name and an upward arrow, and a list of sub-items below it.

- Benefit Recon** (header):
  - Express Reconciliation
  - Benefit Payment Reconciliation
  - GL Reconciliation Report (New)
  - GL Reconciliation Report
  - Employee and Benefit Info (header):
    - Job Data
    - Health Benefits
    - Life and AD/D Benefits
    - Review ABBRs
    - Update ABBRs
    - Employee Event Detail
- Benefit Deductions** (header):
  - Review Paycheck
  - Review Self Service Paycheck
  - Arrears
  - Adjust Arrears
  - Set Max Arrears
  - Update Retro Ded Calc
  - Enter POTT - By Employee
  - Enter POTT - By Batch
- Benefits Billing Information** (header):
  - Enroll in Billing
  - Review Employee Balances
  - Allocate Payments to Charges
  - Review Payment/Details
  - Adjust Payments
  - Adjust Charges
  - Enter Manual Charges
  - Review Adjustment Summary
  - Benefits Billing Audit Report

## ANNUAL PROCESSING TILE

Below is an image of all pages in the Annual Processing Tile. Only pages for which you have access will appear in the Navigation Collection.



### All Pages within the Navigation Collection

