



State of Wisconsin

Department of Administration

HR Core User Fluid Job Aid

(Released 5-1-19)

TABLE OF CONTENTS

DEFINITIONS	3
FLUID NAVIGATION	3
<i>Dashboards, Tiles and Navigation Collections</i>	<i>4</i>
<i>Top Bar Buttons</i>	<i>6</i>
<i>NavBar: Navigator</i>	<i>6</i>
<i>WorkCenters</i>	<i>7</i>
<i>Hiding the Navigation Collection</i>	<i>8</i>
<i>Changing Your Default Homepage</i>	<i>9</i>
<i>Moving Tiles on a Homepage or Dashboard.....</i>	<i>9</i>
<i>Opening a New Window</i>	<i>10</i>
WORKFORCE ADMINISTRATOR HOMEPAGE	11
HR DASHBOARD AND TILES	12
<i>Person Tile and Navigation Collection</i>	<i>13</i>
<i>Position Tile and Navigation Collection</i>	<i>14</i>
<i>Job Tile and Navigation Collection.....</i>	<i>15</i>
<i>Personnel Transactions Tile and Navigation Collection</i>	<i>16</i>
<i>Reports & Queries Tile and Navigation Collection</i>	<i>17</i>
<i>P-File Administrator Tile and Navigation Collection</i>	<i>18</i>

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).

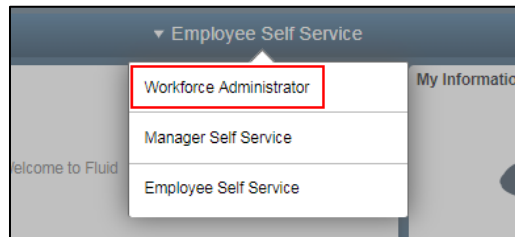
FLUID NAVIGATION

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

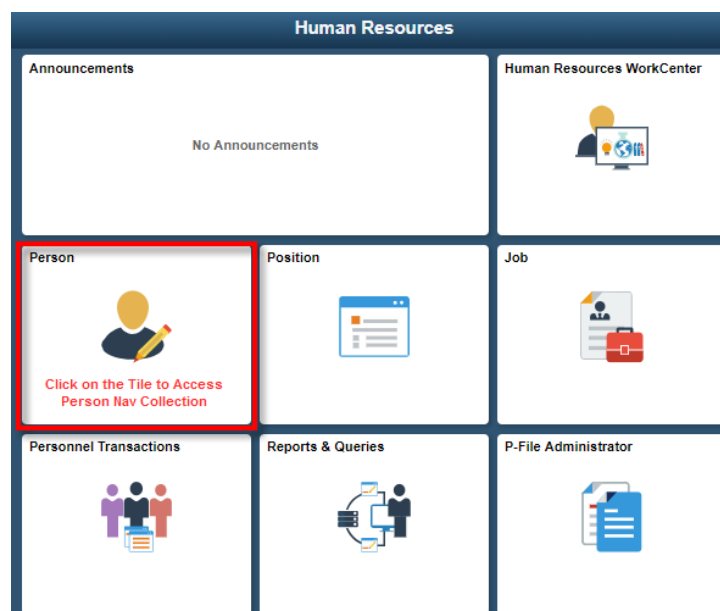
You must first select the Homepage that contains the information you need. Select the **Workforce Administrator Homepage** from the Homepage drop down menu located in the middle of the top bar to access all Core User Pages.



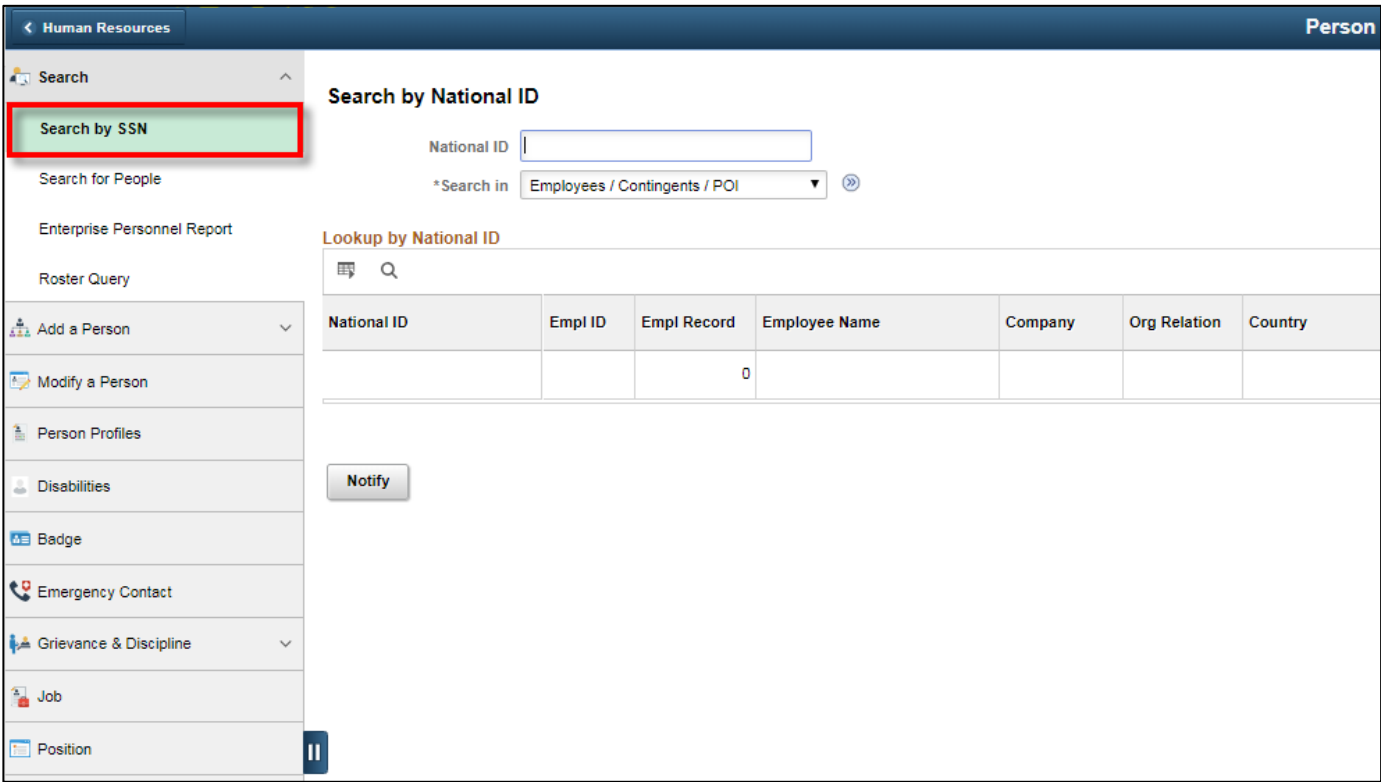
You will then select the applicable Tile to access either a Dashboard (ex. HR Dashboard) or a Navigation Collection (ex. Person, Position, Job, etc.).



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

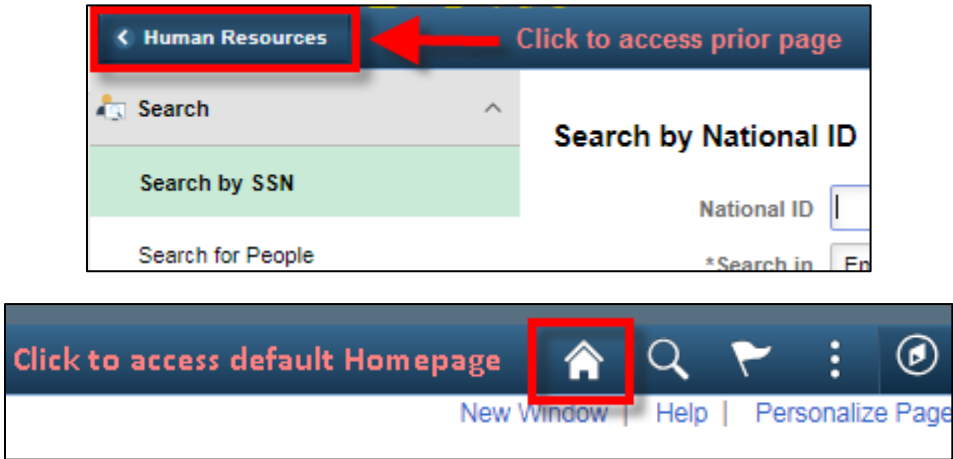


Once you are in a Navigation Collection, click on the Page within the Navigation Collection to access a specific Page.








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.



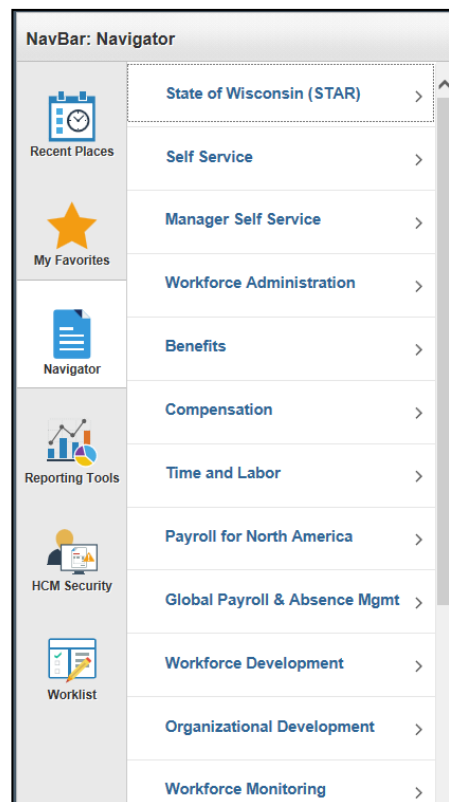
Top Bar Buttons

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

Button Name	Icon	Description
Home		<ul style="list-style-type: none"> Will take you back to your default Homepage Default Homepage is Employee Self Service unless you change it
Search		<ul style="list-style-type: none"> Use to search for pages within the system
Alerts & Notifications		<ul style="list-style-type: none"> Will eventually be used for messages and alerts No information will be populated at go-live
Action List		<ul style="list-style-type: none"> Action List options change based on the page you are on. Options include: <ul style="list-style-type: none"> Add To Favorites – will add a page to your favorites Personalize Homepage – set your default homepage Personalize Dashboard – can move tiles around on your dashboard My Preferences – various options can be selected here including navigation settings Help – contains links to Oracle reference materials Sign Out – signs you out of PeopleSoft
NavBar Reveal		<ul style="list-style-type: none"> Reveals the NavBar: Navigator menu and access to classic navigation

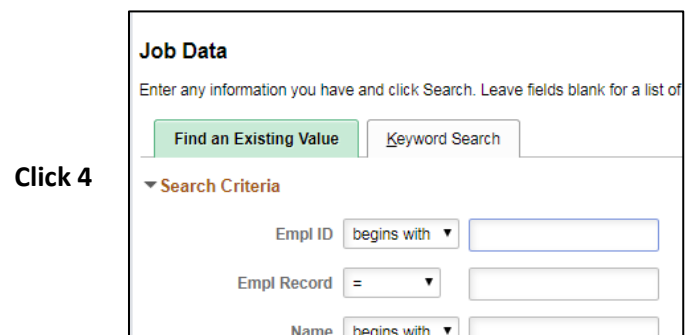
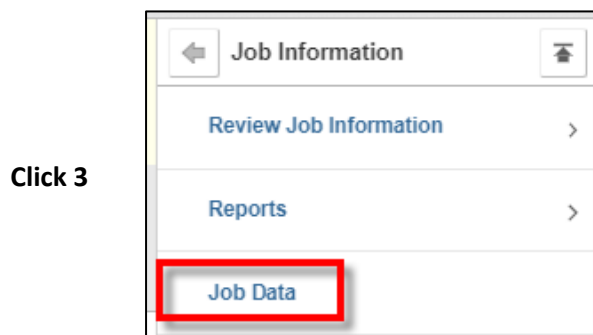
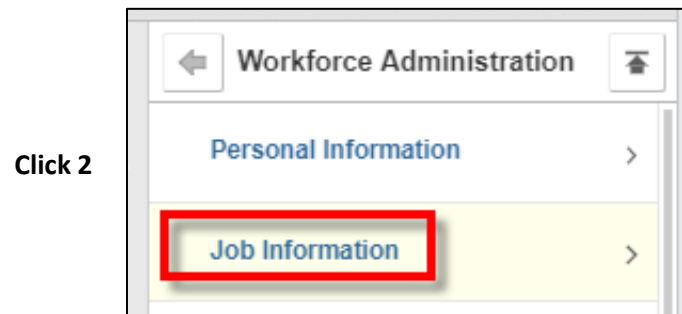
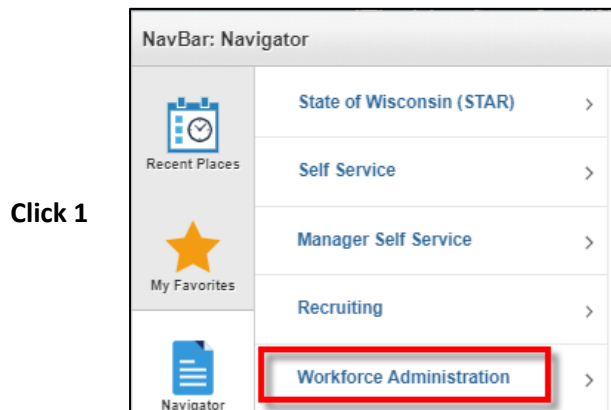
NavBar: Navigator

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

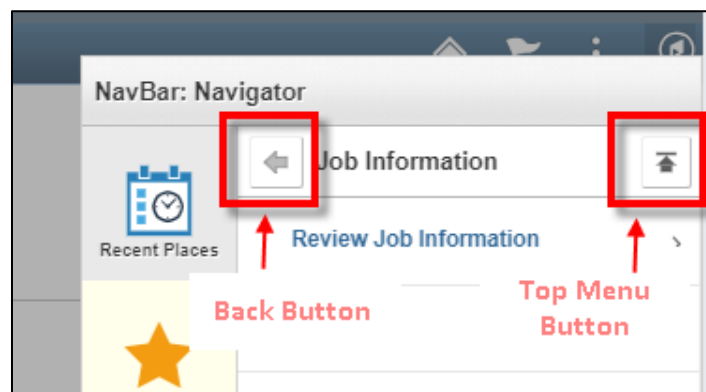


Button	Description
Recent Places	<ul style="list-style-type: none"> Last 5 places you visited
My Favorites	<ul style="list-style-type: none"> Your Favorites – your current Favorites will move forward in to Fluid Can edit Favorites
Navigator	<ul style="list-style-type: none"> Similar to 'Main Menu' and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

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.



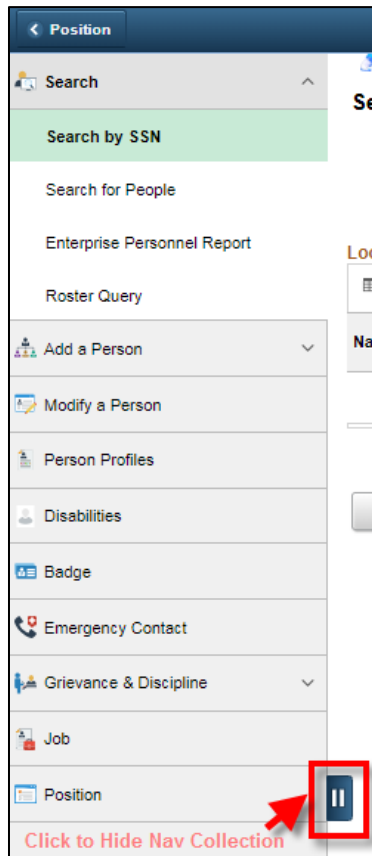
WorkCenters

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.

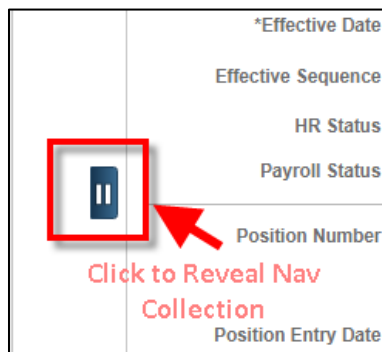
When you click on a link to open a page within the WorkCenter, it will open in a new tab.

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.

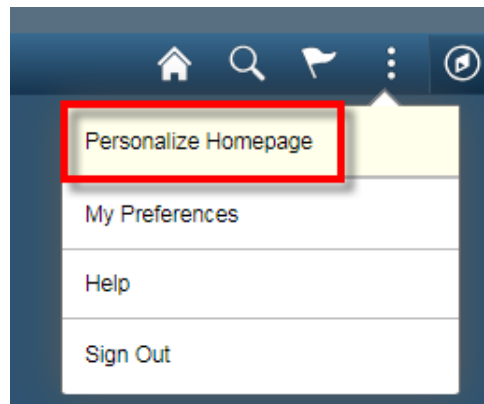


Changing Your Default Homepage

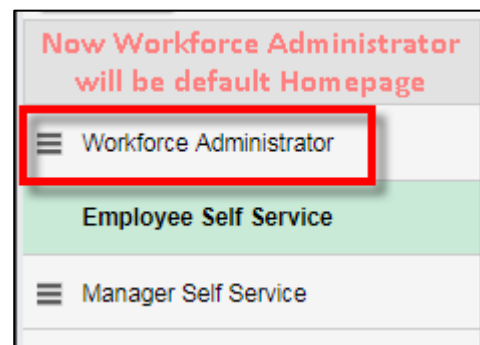
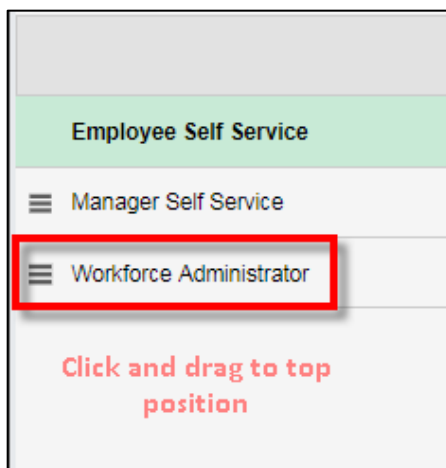
1. From one of the Homepages, select the Action List from the Top Bar



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.



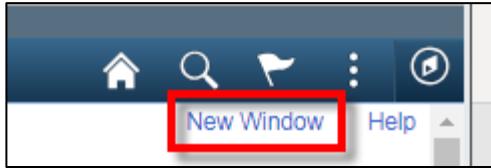
4. Click Save in the upper right corner of the page.

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

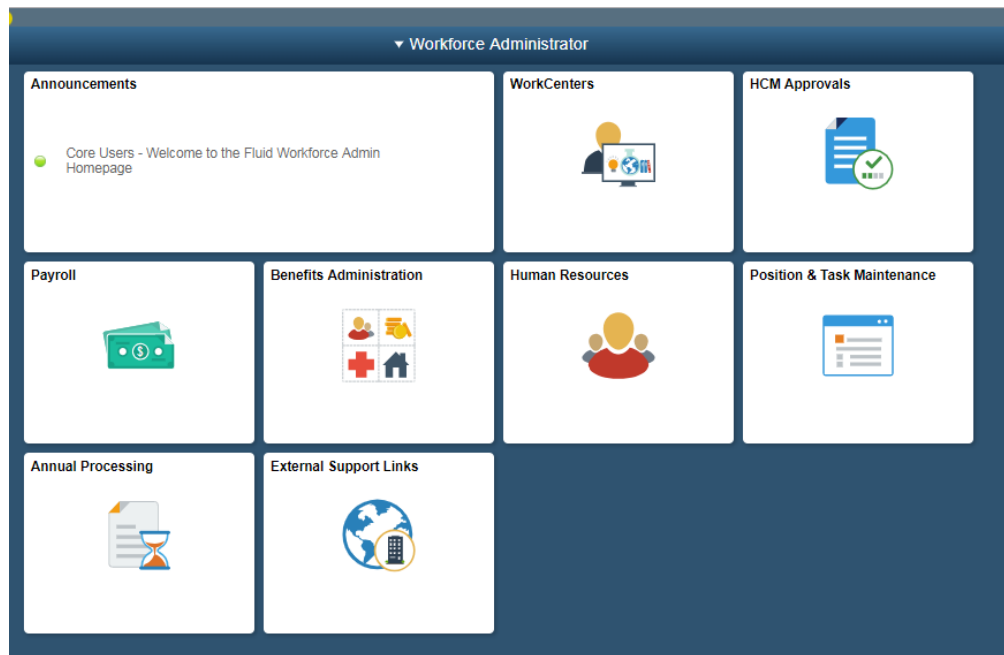
1. Click on **New Window** in the upper right corner to open a new window.



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

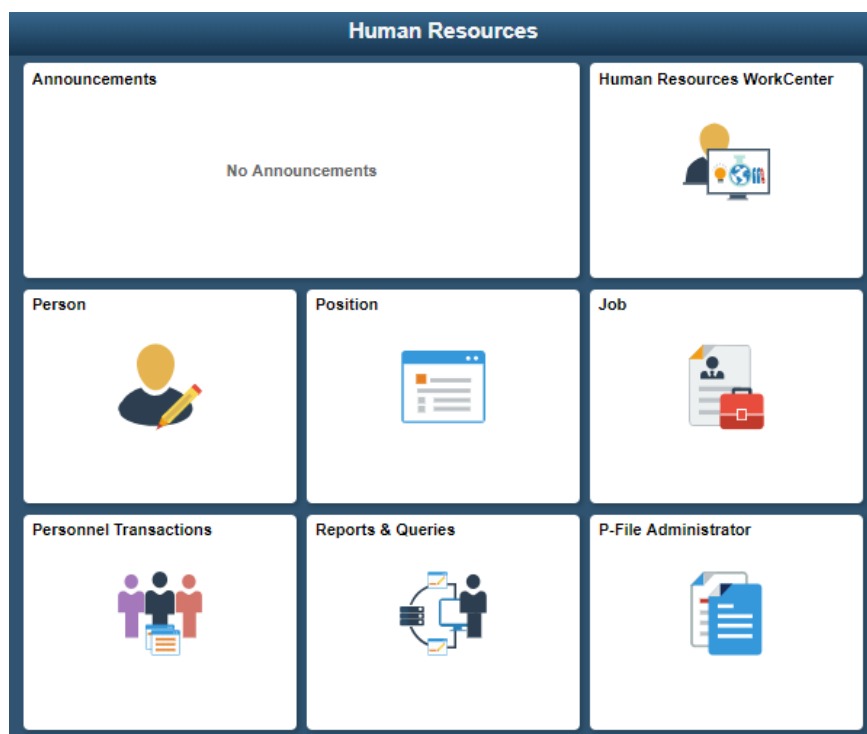
Below is an image of all possible Tiles on the Workforce Administrator Homepage. The ability to view and access Tiles is based on your security.



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

HR DASHBOARD AND TILES

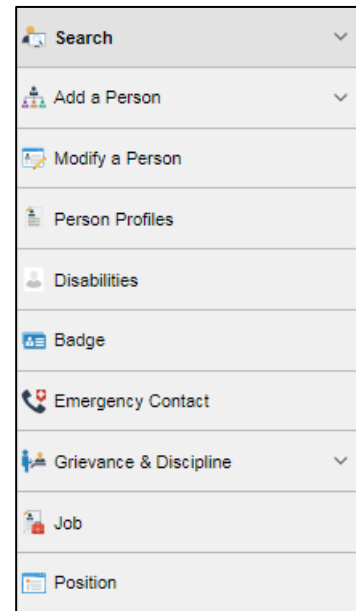
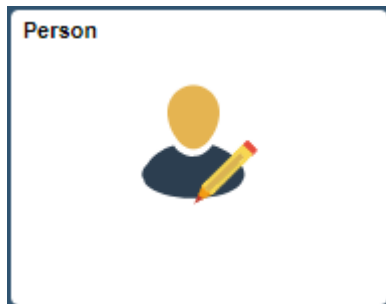
Below is an image of all possible Tiles on the HR Dashboard. The ability to view and access Tiles is based on your security.



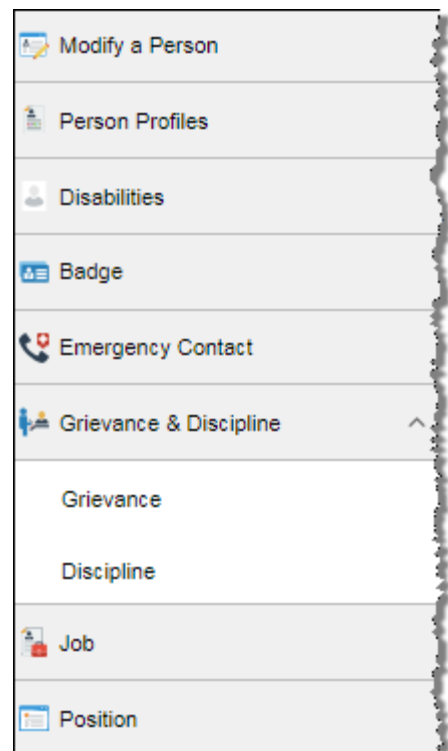
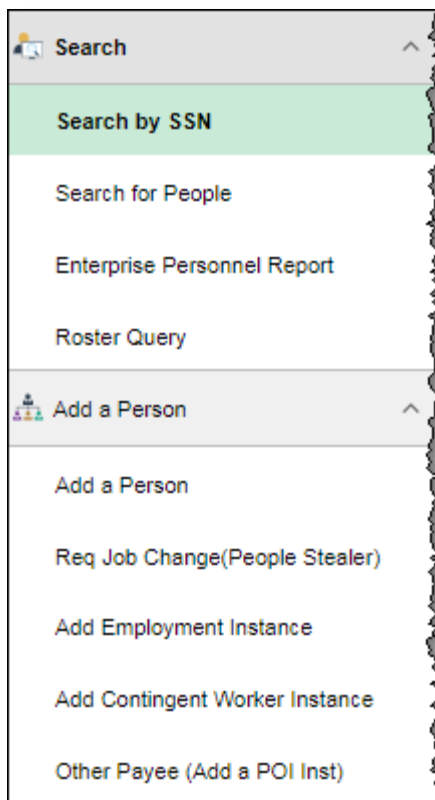
Tile	Description
HR WorkCenter	<ul style="list-style-type: none"> Direct access to HR WorkCenter
Person	<ul style="list-style-type: none"> Access to Person Navigation Collection Includes pages related to Person Data Includes Grievance & Discipline, Person Profiles, Emergency Contact, Badge, etc.
Position	<ul style="list-style-type: none"> Access to Position Navigation Collection Includes pages related to Position Data Includes Dept Budget Table, Position Request Home, Authorized Position Report, etc.
Job	<ul style="list-style-type: none"> Access to Job Navigation Collection Includes pages related to Job Data Includes Person Profiles, People Stealer, Add Instances, etc.
Personnel Transactions	<ul style="list-style-type: none"> Access to Position, Person, and Job in one Navigation Collection Does not include all navigation included in each individual tile above Includes Position Request Home, Add a Person, Job Data, Person Profiles, etc.
Reports & Queries	<ul style="list-style-type: none"> Access to most used HR Reports & Queries Includes Enterprise Personnel Report, Roster Query, Authorized Position Report, LTE Hours Tracking, etc.
P-File Administrator	<ul style="list-style-type: none"> Access to P-File Navigation Collection Includes pages related to P-Files Includes Request for Outside Emp P-File, Approve/Deny P-File Access Request, Restricted Access Employees, etc.

Person Tile and Navigation Collection

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

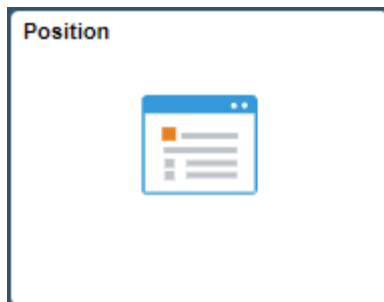








All Pages within the Navigation Collection





Position Tile and Navigation Collection





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



 Position Information	▼
 Position Budget	▼
 Position Requests	▼
 Reports & Queries	▼
 Job	
 Person	

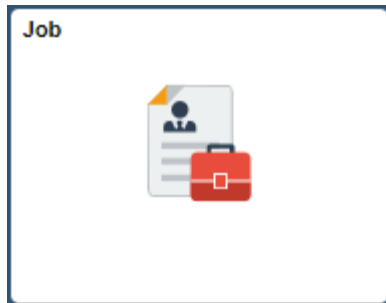
All Pages within the Navigation Collection

 Position Information	^
Add/Update Position Info	
Position History	
 Position Budget	^
Department Budget Table USA	
ChartField Values	

 Position Requests	^
WI Position Request Home	
WI Position Mass Approval	
 Reports & Queries	^
Position Request Form Query	
Pos Req Form w/Approvals Query	
Authorized Positions Report	
 Job	
 Person	

Job Tile and Navigation Collection

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



Job Data	
Person Profiles	
Req Job Change(People Stealer)	
Add new EMPL RECORD	▼
Maintain Time Reporter Data	
Reports & Queries	▼
Person	
Position	
Payroll	
Benefits	

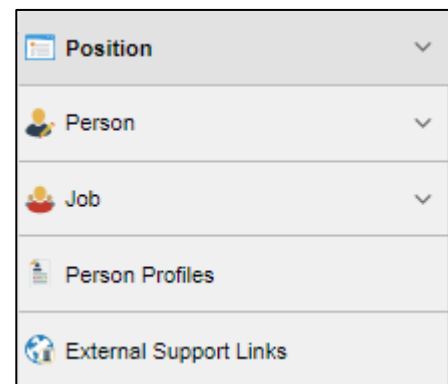
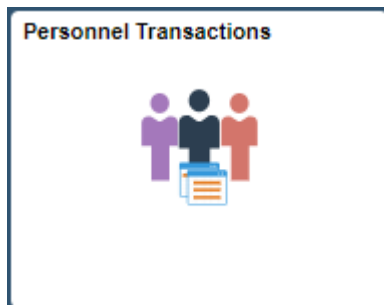
All Pages within the Navigation Collection

Job Data	
Person Profiles	
Req Job Change(People Stealer)	
Add new EMPL RECORD	^
Add Employment Instance	
Add Contingent Worker Instance	
Other Payee (Add a POI Inst)	

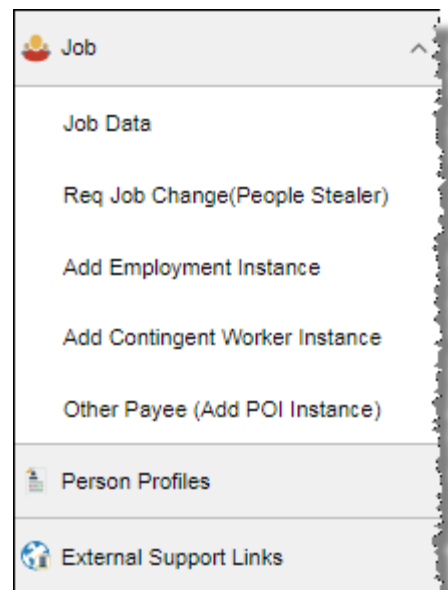
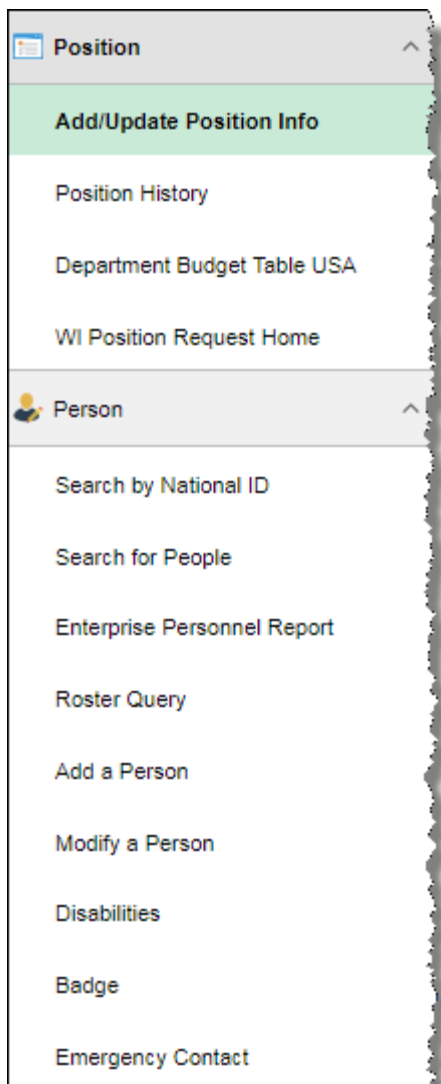
Maintain Time Reporter Data	
Reports & Queries	^
Enterprise Personnel Report	
Annual Pay Progression Report	
Person	
Position	
Payroll	
Benefits	

Personnel Transactions Tile and Navigation Collection

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

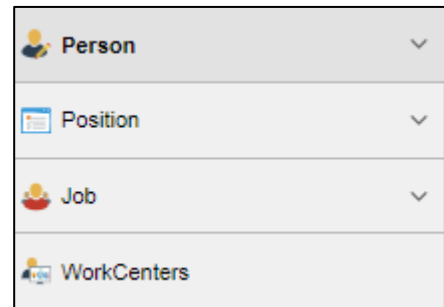
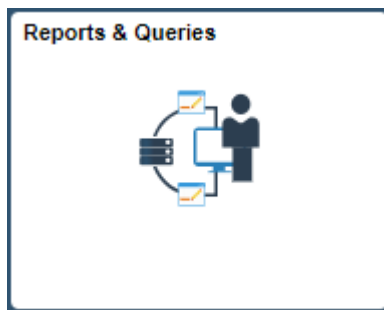


All Pages within the Navigation Collection

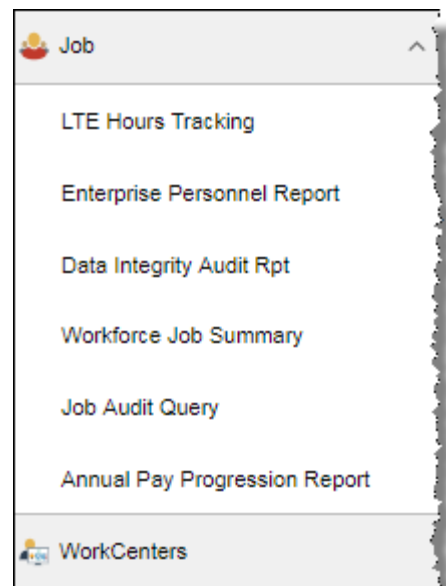
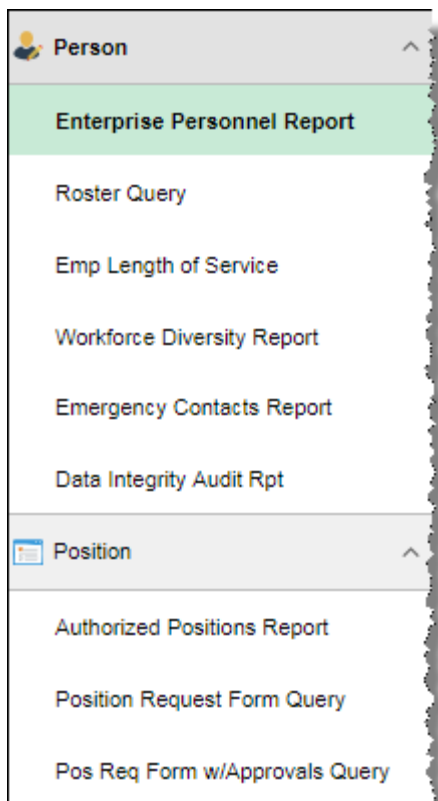


Reports & Queries Tile and Navigation Collection

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

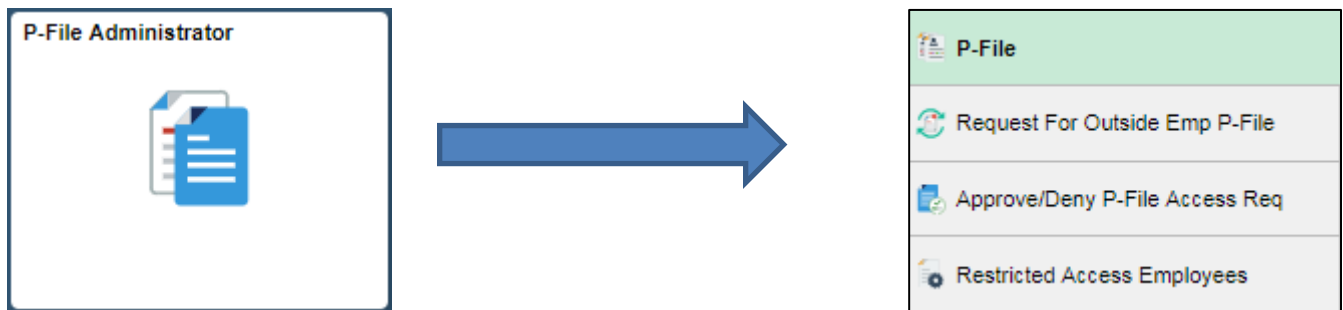


All Pages within the Navigation Collection



P-File Administrator Tile and Navigation Collection

Below is an image of all pages in the P-File Administrator Tile. Only pages for which you have access will appear in the Navigation Collection



All Pages within the Navigation Collection

