



State of Wisconsin

Department of Administration

Position Budget 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>3</i>
<i>Top Bar Buttons</i>	<i>5</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
POSITION TASK & MAINTENANCE TILE.....	12
<i>Position & Task Maintenance Tile and Navigation Collection</i>	<i>13</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).

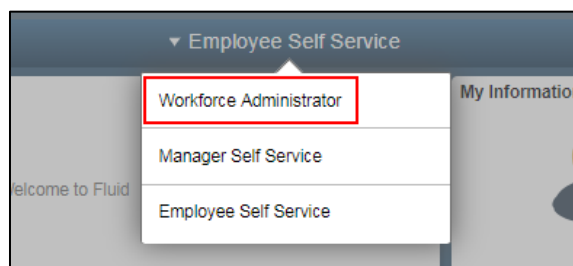
FLUID NAVIGATION

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

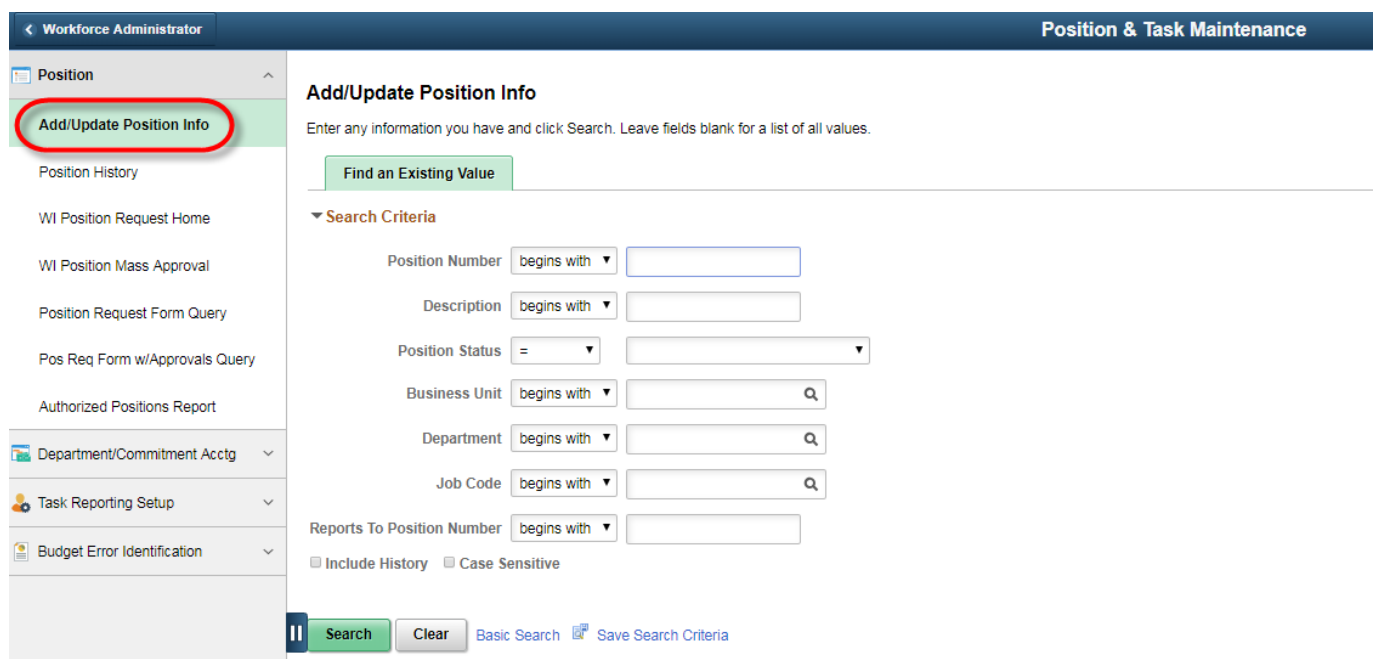
You must first select the Homepage that contains the information you need. Select the **Workforce Administrator Homepage** from the Homepage drop down menu located in the middle of the top bar to access all Core User Pages.



You will then select the applicable Tile to access either a Dashboard (ex. Human Resources Dashboard) or a Navigation Collection (ex. Position & Task Maintenance).

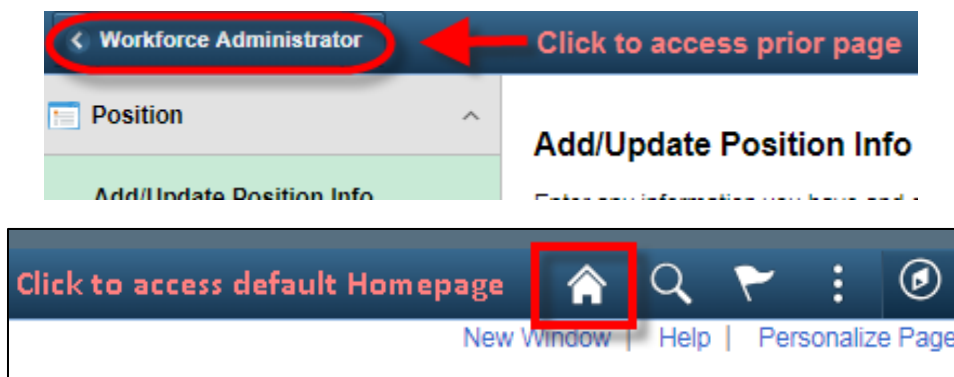


Once you are in a Navigation Collection, click on the Page within the Navigation Collection to access a specific Page.



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.



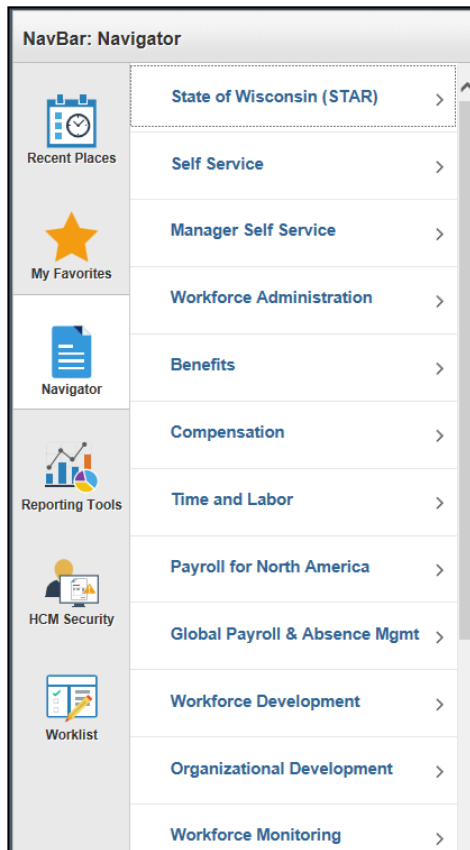
Top Bar Buttons

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

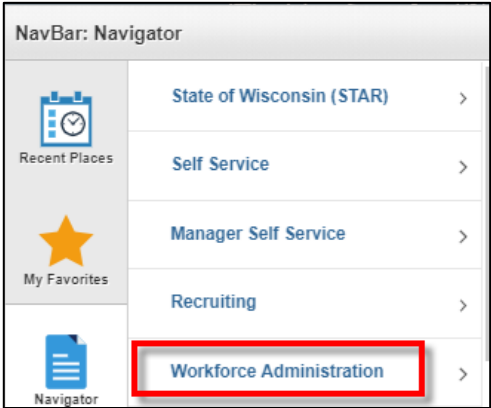
Another way to navigate through the system is through items in the NavBar: Navigator.



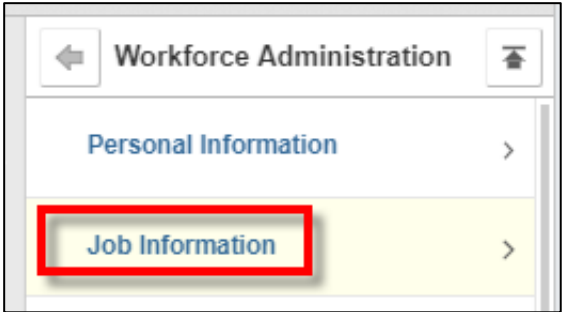
Button	Description
Recent Places	<ul style="list-style-type: none">Last 5 places you visited
My Favorites	<ul style="list-style-type: none">Your Favorites – your current Favorites will move forward in to FluidCan edit Favorites
Navigator	<ul style="list-style-type: none">Similar to 'Main Menu' and will 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 MonitorWill 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.

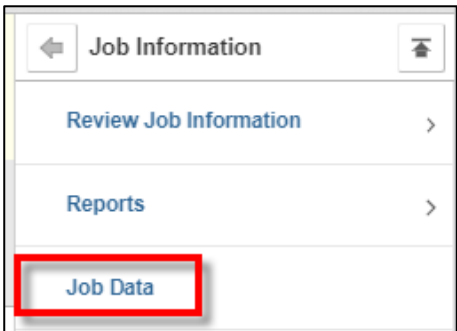
Click 1



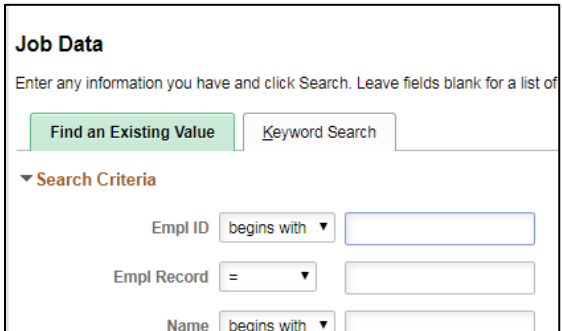
Click 2



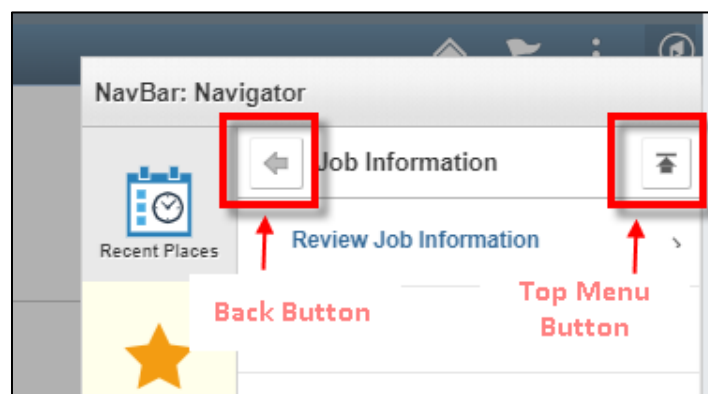
Click 3



Click 4



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.



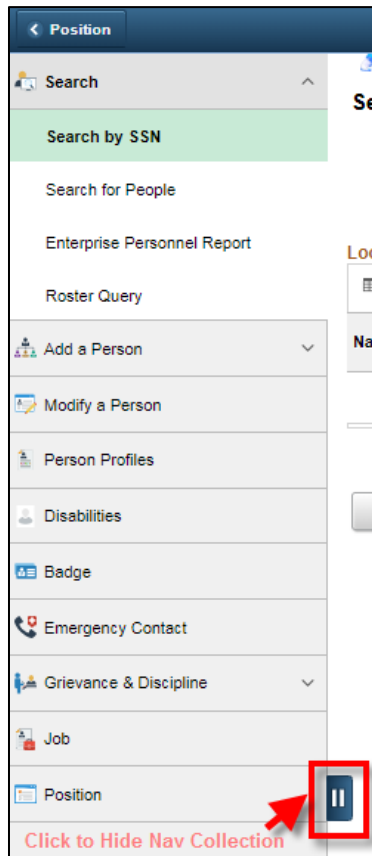
WorkCenters

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.

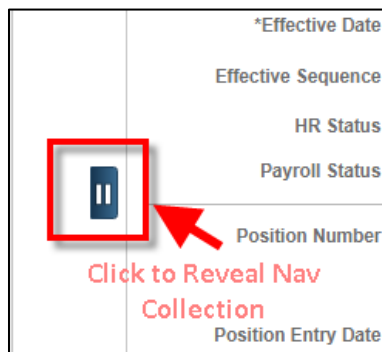
When you click on a link to open a page within the WorkCenter, it will open in a new tab.

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.

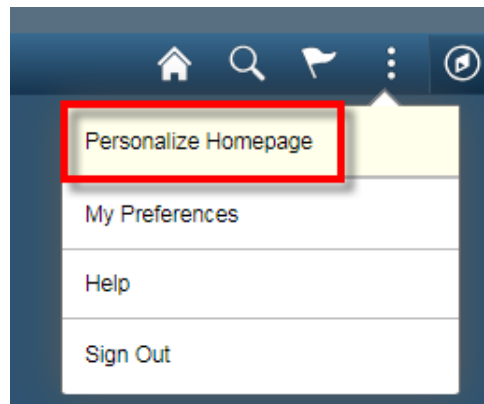


Changing Your Default Homepage

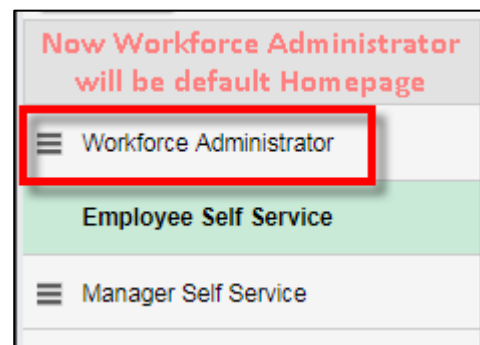
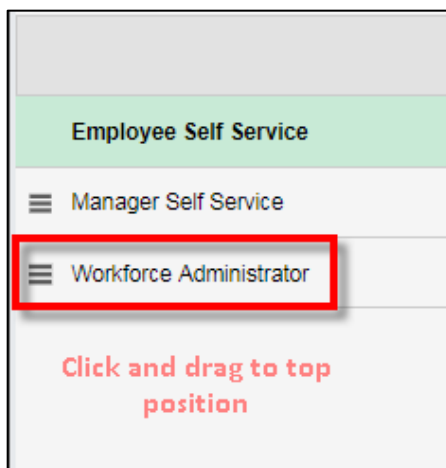
1. From one of the Homepages, select the Action List from the Top Bar



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.



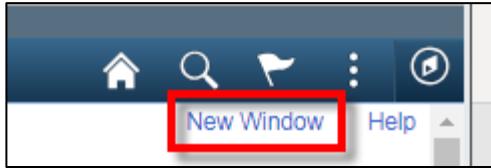
4. Click Save in the upper right corner of the page.

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

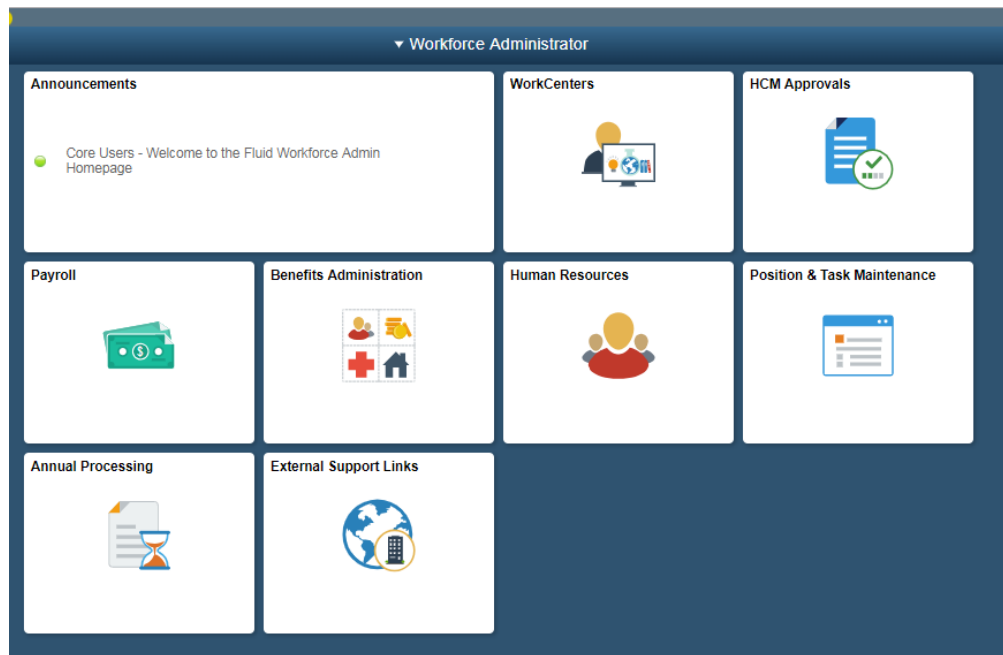
1. Click on **New Window** in the upper right corner to open a new window.



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.

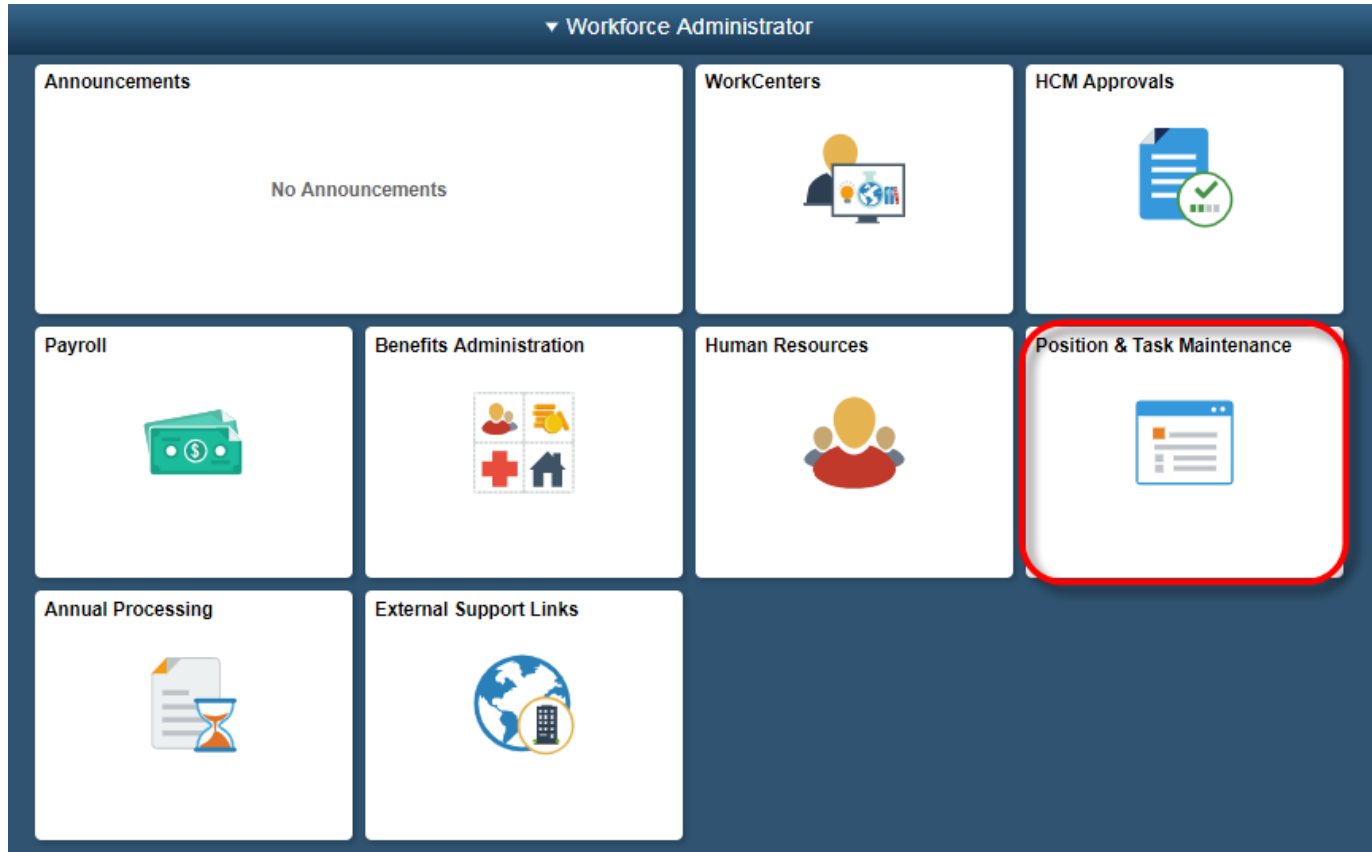
WORKFORCE ADMINISTRATOR HOMEPAGE

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

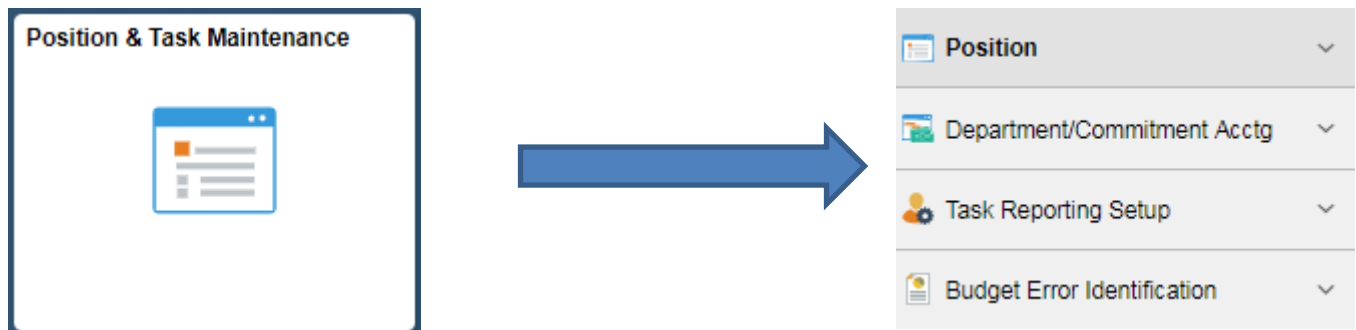
POSITION TASK & MAINTENANCE TILE



Foler	Description
Position Folder	<ul style="list-style-type: none"> Access to Position pages Position pages include Add/Update Position Info, Position History, WI Position Request Home, WI Position Mass Approval, Position Request Form Query, Pos Req Form w/Approvals Query, Authorized Position Report
Department/Commitment Acctg Folder	<ul style="list-style-type: none"> Access to Position Budget/Funding pages Position Budget/Funding pages include Departments, Department Budget Table USA, ChartField Values
Task Reporting Setup Folder	<ul style="list-style-type: none"> Access to Task Reporting pages Task Reporting pages include Task Profile, Task Group, User Field 4, User Field 5
Budget Error Identification Folder	<ul style="list-style-type: none"> Access to Budget Error Identification Queries Budget Error Identification Queries include Payroll Register w/Funding Qry, Project Funding Review Query

Position & Task Maintenance 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

