

CFS 9.2 MP 3.0 Fluid User Interface (Phase II) - Frequently Asked Questions (FAQ)

1] Campus Action Items Testing – Phase II (March 16, 2020 - April 17, 2020):

| | MP 3.0 Fluid User Interface – Phase II – Testing | Comments |
|----|---|----------|
| 1. | On the CFS 9.2 Homepage, are you able to see the 9 Navigation collection Tiles? | |
| 2. | On the Fluid Branding Bar, select the CFS 9.2 drop-down: Can the user see the 4 CFSDEFINEDHP (1-4) Homepages? | |
| 3. | Do you have access to the Personalize Homepage? Click on the Actions List > Personalize Homepage. | |







| | MP 3.0 Fluid Use | er Interface – Phase II – Testing | Comments |
|----|---|--|----------|
| 8. | On the Personalia Homepages? • CMS is a after Ap Select the Homep | ze Homepage, are you able to change the order of the recommending that the order of the Homepages be done ril 27, 2020. Dage > drag Homepage to its new location > Save | |
| | Cancel | Personalize Homepage Save | |
| | | Name Accounts Payable Add Til | |
| | CFSDEFINEDHP3 CFSDEFINEDHP3 CFSDEFINEDHP4 Results below | Accounts Payable Accounts File Attachments a 3 | |
| | Cancel | Personalize Homepage Save | |
| | | Name Accounts Payable Add Tile | |
| | Accounts Payable | Asset Profiles O Accounts Payable O Administer File Attachments O | |
| | CFS92 CFSDEFINEDHP2 CFSDEFINEDHP3 CFSDEFINEDHP4 | Homepage Default / Order Changed Accounts Payable Homepage Moved | |
| | CSU The California State Un | iversity Accounts Payable Q E @ Accounts Payable Administer File Attachments CFS9 2 CFSDEFINEDHP2 CFSDEFINEDHP3 CFSDEFINEDHP4 | |

| | MP 3.0 Fluid User Interface – Phase II – Testing | Comments |
|----|---|----------|
| 9. | Click a Navigation Collection Tile and test Navigation Collection Links. (See <u>#User_Security_Quest_11</u>) Accounts Payable Accounts Receivable Asset Management Billing General Ledger Purchasing End user | |
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2] What is Fluid User Interface?

- Fluid User Interface is a responsive web design, which is a significant enhancement to PeopleSoft's "Classic" user interface.
- Fluid User Interface uses the latest technology HMTL5/JavaScript/CSS3 enabling PeopleSoft Fluid
 pages to scale gracefully from large screen devices of desktops to reduced viewing space of
 smartphones and tablets.

3] What was included in Fluid User Interface – Phase I?

- Go Live for CFS 9.2 MP 3.0 Fluid User Interface was on April 30, 2018 in which the following items were introduced:
 - o CFS 9.2 Homepage
 - o Tiles (User Direct Links)
 - o Classic Main Menu / Breadcrumbs (Available during Transition)

4] What is included in Fluid User Interface – Phase II?

- Go Live for CFS 9.2 MP 3.0 Fluid User Interface is scheduled for April 27, 2020. CMS delivered the following:
 - Four New Homepages (CSFDEFINEDHP [1-4]) that the users can personalize.



• CMS is delivering 7 New Navigation Collection Tiles along with 2 New External Link Tiles which will be available to all users on the New CFS 9.2 Homepage.

| Accounts Payable | Accounts Receivable | Asset Management |
|-------------------------------|------------------------------|------------------|
| | | <u>kii</u> |
| Billing | General Ledger | Purchasing |
| i | | |
| CFS 9.2 Application Documents | Finance Data Warehouse (PRD) | CFS End User |
| | | |

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| Business U | nit COCSU | | | |
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o Classic navigation (deep locator link hierarchy) will <u>no longer</u> be available

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| The menu is no Highlights | Acco | ounts Payable | Vouchers Control Group Payments | s 🔒 | Add/Update Maintain Approve | | | Voucher Carbon Quick Invoice Entry |
| Recently Used Favorites menu | Billin | ng Garan Gar | Batch Process Review Accou Review Accou | ses ints Payable Info |) | e Passina in | | Summary Invoice Entry Complete Register Voucher Close Voucher |
| | Pure Pure Sup | chasing pliers tomers | Accounts Paya AP Operationa | able WorkCenter al Dashboard | | | | Delete Voucher Update Open Item |
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| | | | | | | | | |

o Classic Home will <u>no longer</u> be available



5] What is a Navigation Collection Tile?

• As an alternative to using the Navigator (NavBar) 🕗 - (Fluid Main Menu), a Navigation Collection Tile is means of creating a custom collection of links to frequently accessed components/pages within the application.

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|------------------|--------------------------------|--|
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- 6] Why is it that when a user creates a Direct Link Tile within a Navigation Collection Tile, the Direct Link Tile becomes a copy of the Navigation Collection Tile instead of it being a link to a specific page?
 - This is a known issue with the current version of PeopleTools (8.55.13). This issue has been resolved in the future versions of PeopleTools (8.57.11).
- 7] What will happen to my personal tiles that I have pinned to the CFS 9.2 Homepage?
 - On March 11, 2020, CMS released four new homepages [CFSDEFINEDHP (1-4)]. This will give users the opportunity to move all direct link tiles pinned on the CFS 9.2 Homepage to one of their new personal homepages CFSDEFINEDHP (1-4).

- 8] What will happen to my personal tiles I pinned to the CFS 9.2 Homepage if I do not move them to my personal Homepages (CFSDEFINEDHP1-4)?
 - The Navigation Collection Tiles and Direct Link Tiles will combine on the CFS 9.2 Homepage. The user can go to the Personalize Homepage and move the direct link tiles to their Personal Homepages.

| CSU The California State University | | • CFS | 59.2 | | n 🔉 n | - ≡ @ |
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| | Accounts Payable | Process Monitor | Group Information | Accounts Receivable | | |
| | Asset Management | Billing | General Ledger | Purchasing | | |
| | CFS 9.2 Application Documents | Finance Data Warehouse (PRD) | CFS End User | Supplier | | |
| | Permission Lists | CO Concur Outbound | Roles | User Profiles | | |
| | Asynchronous Services | Administer File Attachments | URLs | External Accounts | | |
| | | | | | | c |

- 9] Can I change the order of Homepages and/or set a different Default Landing Homepage?
 - Yes, users can personalize/re-arrange the order of Homepages by using the Action List > Personalize Homepage function. The Homepage that the users elect to have as the first one on their Homepage Menu becomes their Default Landing page.
 - CMS is recommending that the order of the Homepages be done after April 27, 2020.

| CSU The California State University | | ▼ CFS | 9.2 | | ^ ৭ ₹ ≡ 0 |
|-------------------------------------|------------------|-----------------------------|---------------------|------------------|----------------------|
| | Accounts Payable | Administer File Attachments | Accounts Receivable | Asset Management | Personalize Homepage |
| | | | | <u>, 19</u> | Publish Homepage |
| | | PEOPLESOFT | | | My Preferences |
| | | | | | Help |
| | Billing | General Ledger | Purchasing | CFS End User | Sign Out |
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10] Why do some links open a New Window Tab?

- PeopleSoft's current Fluid version has limitations in which a New Window tab is required to open a few of the pages. This issue has been resolved in a later version of PeopleTools.
 - o Query
 - o Query Viewer
 - o Schedule Query
 - o Review Requisition
 - Accounting Entries (Req)
 - o PO Accounting Entries

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- 11] Do we have to change or create new User Roles / Permission lists for the Phase II release?
 - No, there are no security action items that need to be performed by the campus. The User's current Role(s) / Permission list(s) assigned to that user determine the content/access in Navigation Collection Tiles.

12] Can a User's Personalized Homepage be copied to another User?

- This capability is not available in the current Fluid version.
- 13] If a Navigation Collection is copied to a User's Personal Homepage and the underlying content of the Navigation Collection is updated by CMS, will it update Navigation Collection that was copied to the User Personal homepage?
 - Yes, the Navigation Collection copied to the User personal homepage will reflect any updates/changes that CMS performs.

14] Can we obtain a list of users that have Direct Link tiles pinned to the CFS 9.2 Homepage?

• Yes, please send an email to either Steve Sharifi (<u>ssharifi@calstate.edu</u>) or Carmen Arreguin (<u>carreguin@calstate.edu</u>) with that request.

15] Where can I find the Fluid documentations and recordings:

On the CSYOU site, navigate to the following (link <u>App Development Document Site</u>):



OR

• By using the CFS Finance Application, once the user logs in, on the CFS 9.2 Homepage click on the CFS 9.2 Application Document Tile > CFS 9.2 Fluid user Interface



Fluid User Interface Site



| | MP 3.0 Fluid User Interface – Phase II | Date | Time |
|-----|---|--------------------------|------------------------|
| 12. | MP 3.0 Fluid User Interface – Phase II Review Session | 3/10/2020 | 10:00 am - 12:00 pm |
| 13. | Production- CFSDEFINEDHP (1-4) Homepages will be available. Users can move direct link tiles from CFS 9.2 Homepage to CFSDEFINEDHP (1-4) Homepages. | 3/11/2020 | |
| 14. | MP 3.0 New User Interface – Fluid Phase II Review Session (Repeat) | 3/12/2020 | 10:00 am - 12:00 pm |
| 15. | User Testing - FCFSPRE | 3/16/2020 – 4/17/2020 | |
| 16. | Q&A Teleconference | 3/26/2020 | 10:00 am - 11:00 am |
| 17. | Move to Production / Production Downtime | 4/24/2020 | 6:00pm- 12:00am |
| 18. | Production Go-Live | 4/27/2020 | 8:00am |

16] What are the key dates associated with the MP 3.0 Fluid User Interface (Phase II) release?