

9.2 PEOPLESOFT

9.2 MANAGER SELF SERVICE

THIS INFORMATION DOCUMENT IS USEFUL FOR:

Employee

Manager

Administrator

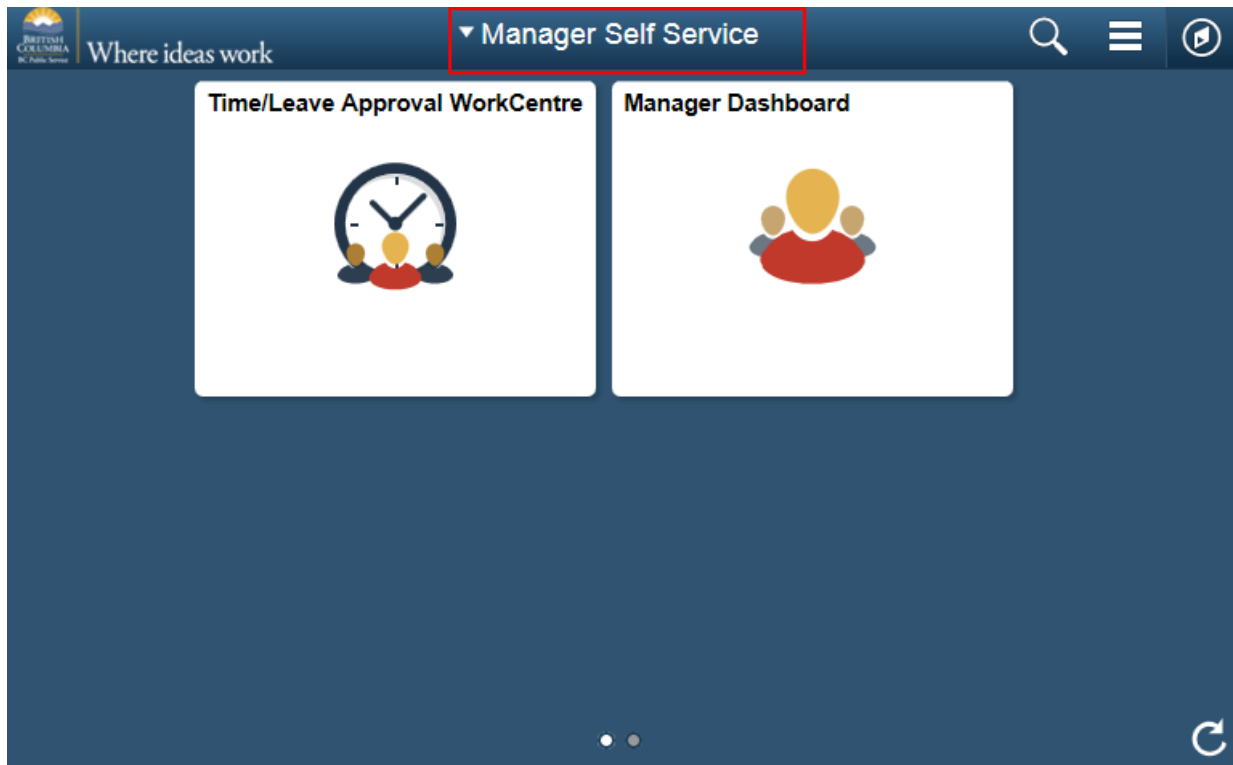
9.2 PEOPLESOFT NAVIGATION:

The look and feel of PeopleSoft has changed with the 9.2 Upgrade. The biggest change is how you navigate in PeopleSoft and Time and Leave. You will notice that the Pagelet menu structure (Classic Menu structure) has been replaced with a Tile Menu structure (Fluid Navigation) and a right hand navigation tool.

This Information document presents the changes and introduces you to the new look and feel of navigation in 9.2 PeopleSoft.

9.2 MANAGER SELF SERVICE

If you have Manager Self Service access in PeopleSoft, your default Homepage will be the new Manager Self Service Homepage.

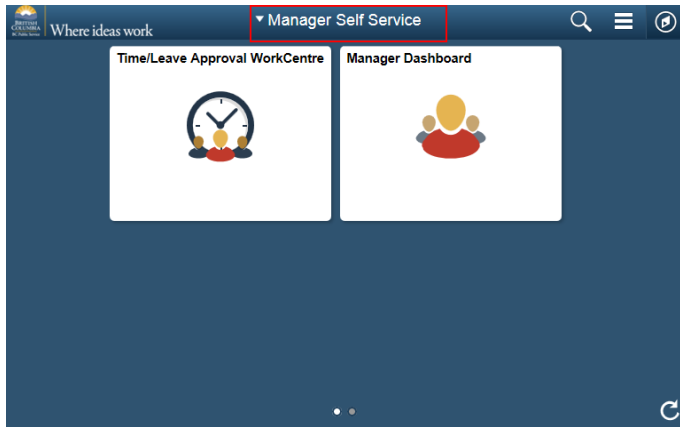


The following section provides a comparison of the current 9.1 version of PeopleSoft with the new 9.2 version of PeopleSoft.

9.2

Manager Self Service

NEW! Manager Self Service Homepage with tiles that allow easy access to the most frequently used areas within Manager Self Service (Fluid Navigation).



Tiles may include:

- **Manager Dashboard** if you have employees that directly report to you in PeopleSoft.
- **Time/Leave Approval WorkCentre** if you manage time and leave entries for other employees in Time and Leave.

9.1

Manager Self Service

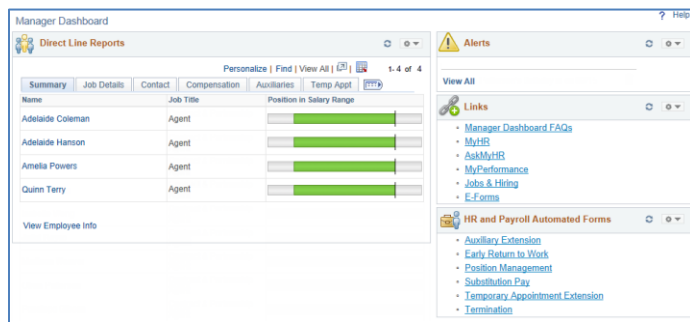


Pagelet Menu Structure (Classic Navigation).

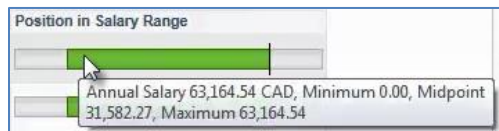
9.1

Manager Dashboard

Click the Manager Dashboard tile manage your direct reports in PeopleSoft.



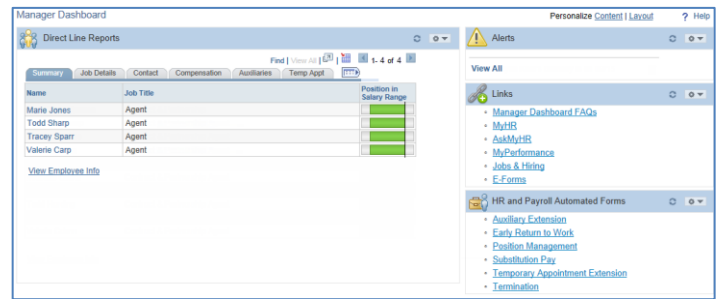
NEW! When you hover over the Position in Salary Range bar you can view the Annual Salary, the Minimum, Midpoint, and Maximum for the salary range.



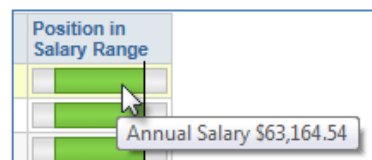
9.2

Manager Dashboard

Click the Manager Dashboard link to manager your direct reports in PeopleSoft.



When you hover over the Position in Salary Range bar you can view the Annual Salary.



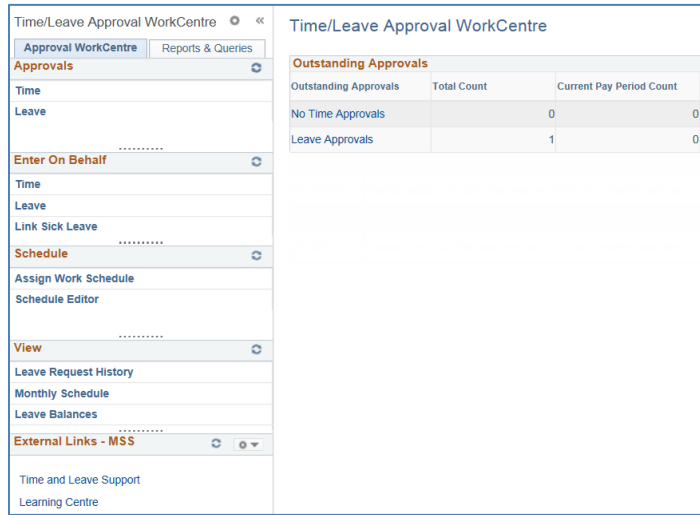
9.1

Time/Leave Approval WorkCentre

Navigation has remained the same as 9.1

NEW! For additional information about the functional changes in Time and Leave please review the following documents:

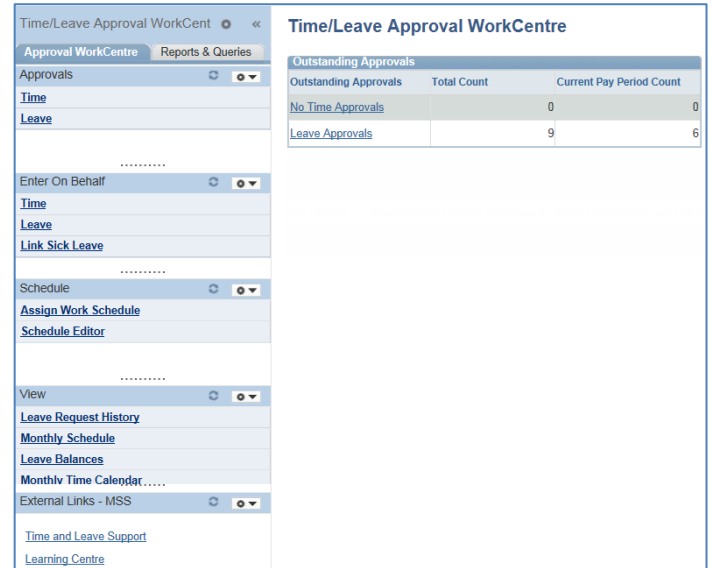
- 9.2 Time/Leave Employee WorkCentre
- 9.2 Time/Leave Approval WorkCentre



9.2

Time/Leave Approval WorkCentre

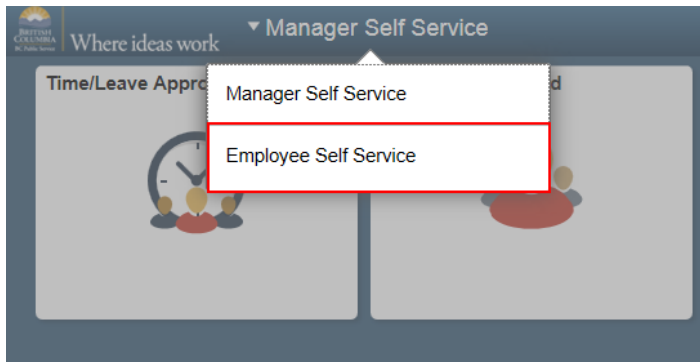
Click the Time/Leave Approval WorkCentre tile to manage your employees in Time and Leave.



9.1

Employee Self Service

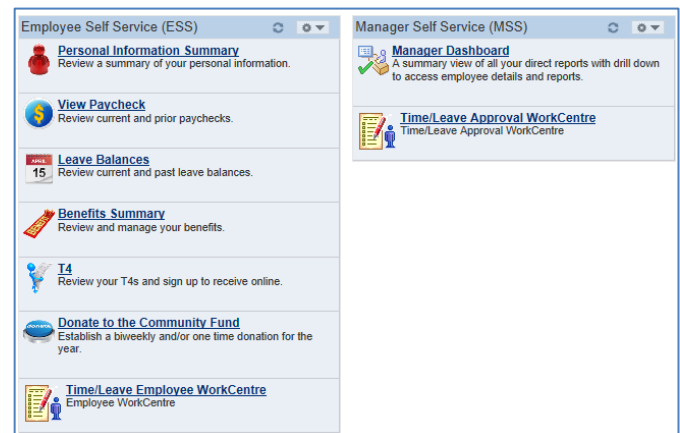
NEW! Click the Homepage drop down menu beside Manager Self Service, to access your Employee Self Service Homepage.



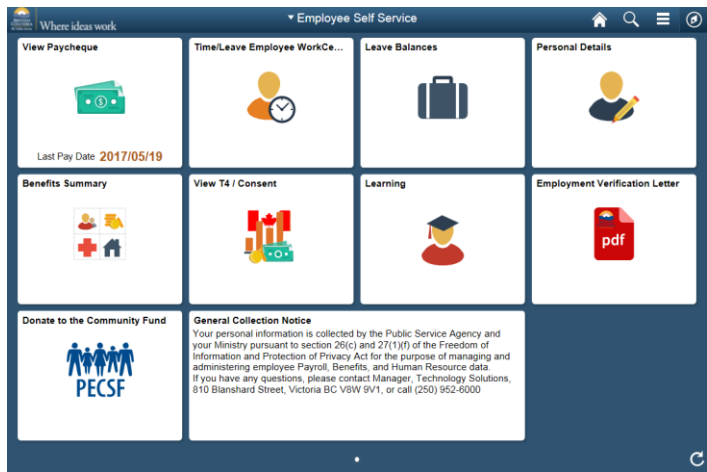
9.2

Employee Self Service

The Employee Self Service menu is displayed to the left of Manager Self Service (Classic Navigation).



The new Employee Self Service Homepage is displayed with tiles that allow easy access to the most frequently used areas within Employee Self Service (Fluid Navigation).

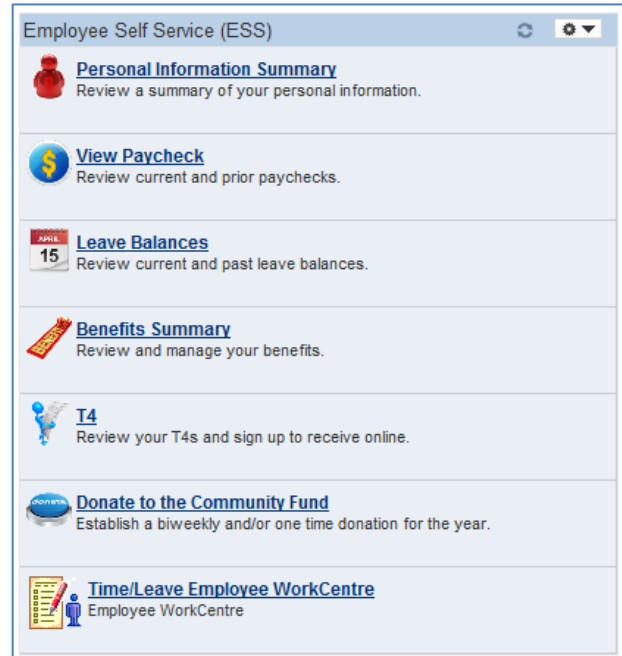


Tiles include:

- View Paycheque
- Time/Leave Employee WorkCentre
- Personal details
- View T4/Consent
- Leave Balances
- **NEW!** Employment Verification Letter
- Benefits Summary
- Donate to the Community Fund
- **NEW!** Learning

For more information on the new look and feel in Employee Self Service please see the 9.2 Employee Self Service document.

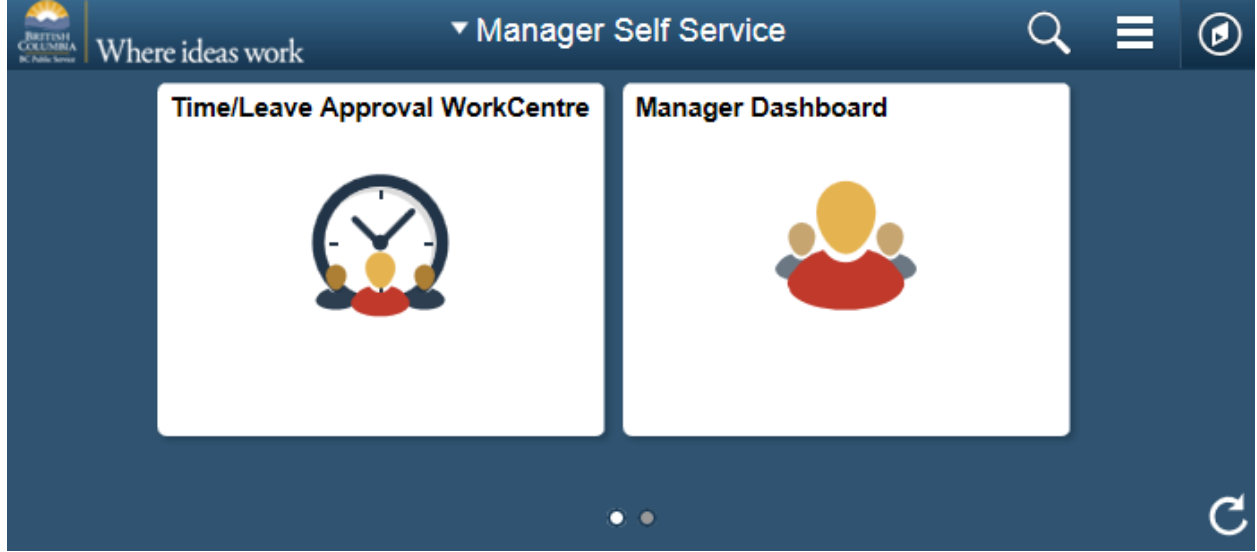
Current pagelet menu structure (Classic Navigation).



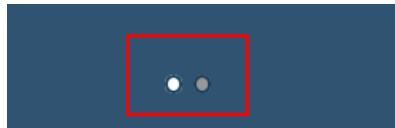
New Navigation Symbols and Icons

The following is a review of 9.2 PeopleSoft symbols and Icons

Homepage and Tiles



Page Indicator



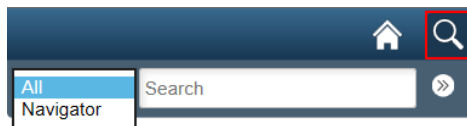
If you have more than one Homepage, the number of dots indicates the number of Homepages you have and which one you are currently on, e.g. If you have Employee Self Service and Manager Self Service, you will see two dots.

Home Icon



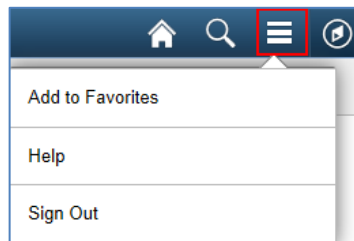
Where ever you are in PeopleSoft, you can navigate to your main Homepage by clicking the Home icon.

Search Icon



By clicking on the Search Icon, you can search for menus throughout the application or folders within the Navigator menu structure.

Actions List



From here you can Add to Favorites and Sign Out. The Help link takes you to generic PeopleSoft help. For PeopleSoft help that is specific to the Government of BC, navigate to Time and Pay Portal> Help tab.

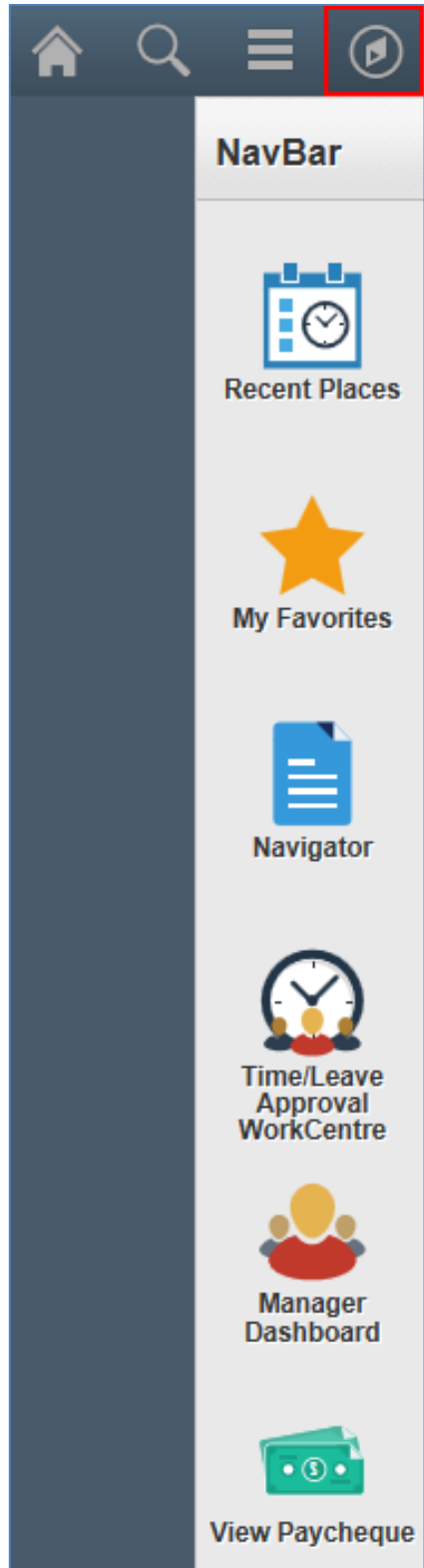
NavBar




From here you can access additional navigation features (see next page).

NavBar

NavBar (Navigation Bar) **NEW!**



The NavBar (Navigation bar) provides additional navigation options displayed vertically on the right hand side of the screen.

Click the NavBar icon  in the upper right corner of the display to open a new navigation menu bar. To close the NavBar, click anywhere on the page outside of the NavBar.

Recent Places

Where you now find Recent Places. The last 5 pages you have accessed will be displayed so that you can quickly navigate back to any one of them.

My Favorites

Where you now find your Favorites. From here you can easily edit or navigate to any page that you have saved as a favourite.

Important! Your Favorites from 9.1 have been retained but the navigation pathways may have changed in 9.2. If you receive an error when accessing a page you have saved as a favorite you will need to re-add it to your favorites.

Navigator

Where you now find the Main Menu. The main menu allows you to navigate to the other areas of PeopleSoft that you have access to.

Time/Leave Approval WorkCentre

This is another way you can access the Time/Leave Approval WorkCentre if you manage others in Time and Leave. This will not be displayed unless you manage others in Time and Leave.

Manager Dashboard

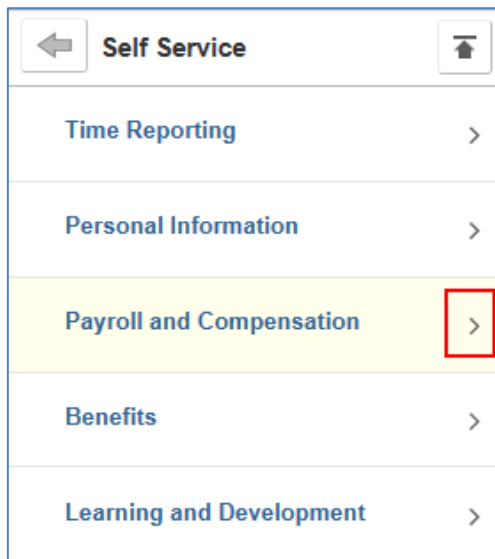
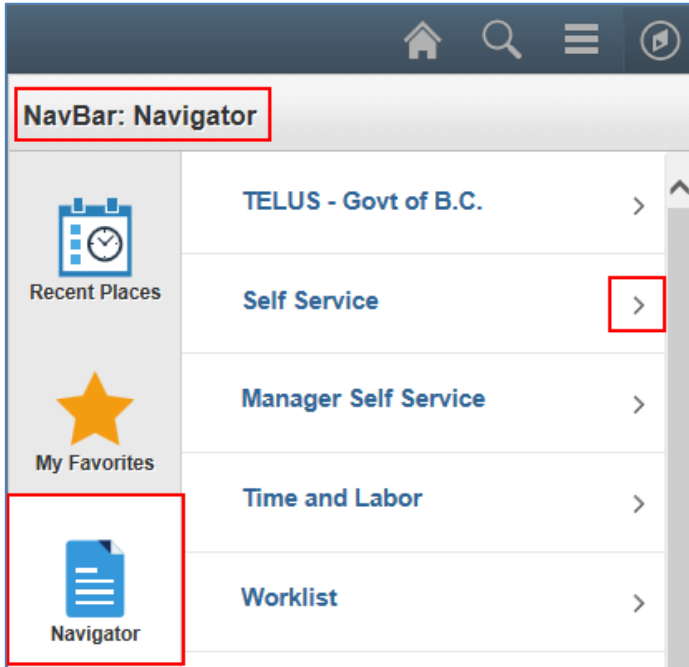
This is another way you can access the Manager dashboard of you have direct reports.

View Paycheque

Select to view your own Paycheque.

NavBar - Navigator

Navigator NEW!



The Navigator is the new Main Menu.


From the NavBar, select the Navigator to view the new Main Menu.


The menu items displayed are dependent on your security and role.


The Navigator allows you to access additional self-service pages that are not accessible from your Homepage, such as Direct Deposit.

If you have View-only access to PeopleSoft data for your Ministry, the Navigator allows you to access the additional menu items, such as Workforce Administration, Benefits, Payroll for North America, Reporting, etc.

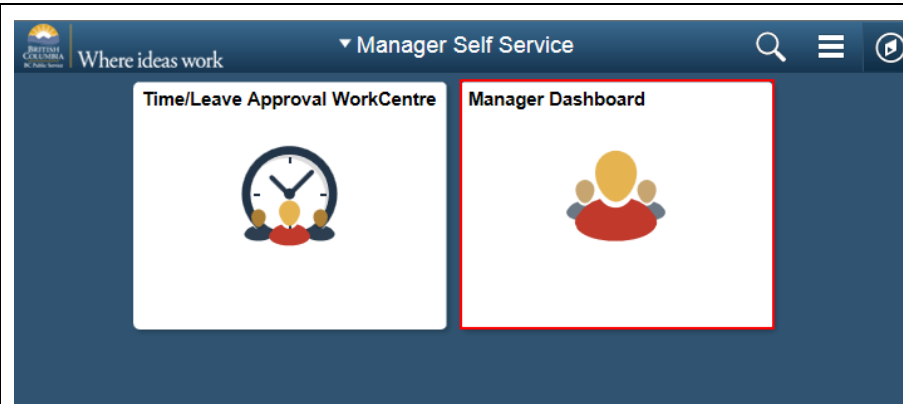
Click on each menu item to view submenu options.

Click the arrow  on the right to navigate through the submenu items.

Click the back arrow  to navigate to the previous submenu or menu item.

Click  to navigate back to the top of the Main Menu hierarchy.

Classic Navigation



Many of the pages that you access in PeopleSoft will display the Classic Main Menu and breadcrumbs at the top of the page.

In addition to the Homepage and NavBar, the Classic Main Menu and breadcrumbs can be used to navigate through PeopleSoft just as in 9.1.

Menu items displayed are dependent on your security and role.

The Main Menu allows you to access additional self-service pages that are not accessible from your Homepage, such as Direct Deposit.

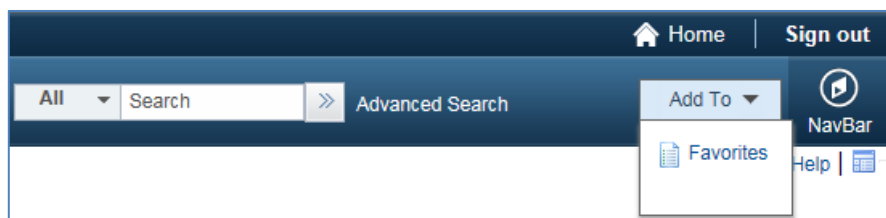
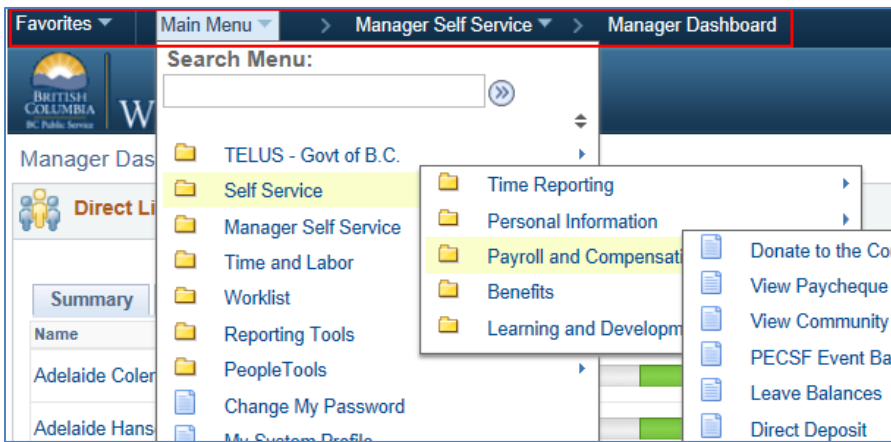
If you have View-only access to PeopleSoft data for your Ministry, the Main Menu allows you to access the additional menu items, such as Workforce Administration, Benefits, Payroll for North America, Reporting, etc.

You can also access your Favorites from the Main Menu.

Important! Your Favorites from 9.1 have been retained but the navigation pathways may have changed in 9.2. If you receive an error when accessing a page you have saved as a favorite you will need to re-add it to your favorites.

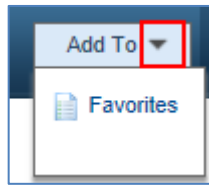
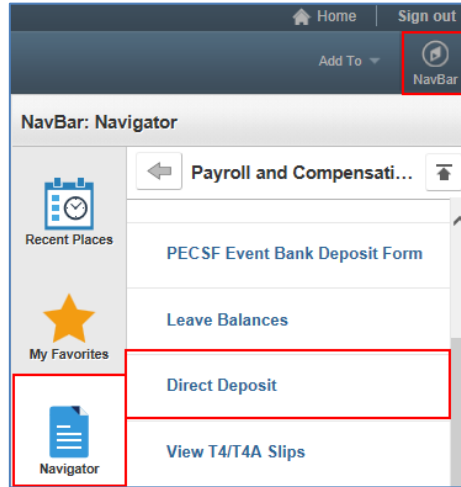
For pages that display the Classic Main Menu, the icons in the upper right corner are slightly different and include:

- Search
- Home
- Sign Out
- Add to Favorites
- NavBar

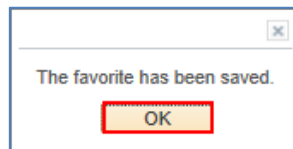
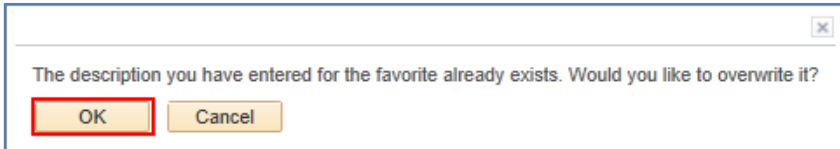
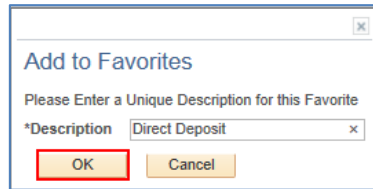
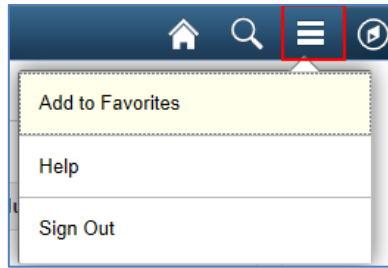


My Favorites

My Favorites Important!



OR



Your Favorites from 9.1 have been retained but the navigation pathways may have changed in 9.2. If you receive an error when accessing a page you have saved as a favorite you will need to re-add it to your favorites.

To re-add your favorites :

1. Click on the NavBar > Navigator
2. Navigate to and select the specific page.
3. Select **Add to Favorites** in the top right Add To drop down or Actions list.
4. Click OK to add.
5. Click OK to overwrite the previous favorite.
6. Click OK to save.

Version History

1	September 15, 2017	New Information Document created.
2	September 28, 2017	Added a note regarding Position in Salary Range bar to page 2. Updated NavBar screenshot on page 6 to include Manager Dashboard link and added Manager Dashboard info on the right. Updated the first screenshot on page 1, 2, 3, 5, 6, 7 and 8 to remove flag icon. Updated the last screenshot on page 8 to include the Search and added "Search" to the bullet points on the right.