Contra Costa County PeopleSoft Training

ESS Navigation

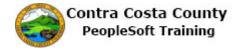


Training Guide



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Navigation for Self Service Users

ESS Navigation

This course covers how to navigate using the Employee Self Service Pages.

Lessons in this course are:

- An Overview of Fluid and Classic pages
- Accessing the System
- Home Pages
- Fluid Page Elements
- Favorites

These lessons address both the new Fluid and the Classic pages. Most Employee Self Service pages are Fluid pages. However, the eBenefits portion of Self Service is still presented on classic pages. As a Self Service user, you will use both Fluid and Classic pages.

Each lesson, with the exception of the first contains one or more topics.

These topics are available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid. Many lessons also have associated Quick Reference Guides.

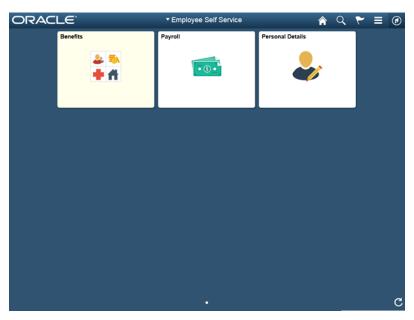
Fluid and Classic pages

PeopleSoft 9.2 introduces Fluid pages. These pages offer a simpler, easier to use user interface. In PeopleSoft 9.2 Fluid pages exist alongside "classic" PeopleSoft pages. In the Contra Costa County PeopleSoft system, both fluid and classic pages are used. On signing-in you will land on a on a Fluid Home page. Depending on your security, you may have more than one Fluid Home page. You can easily move between home pages. All PeopleSoft pages for which you have security will be accessible from the Fluid Home page. The classic Home Page that was used in PeopleSoft 8.8 (updated to version 9.2) is still available. You can access this page from a Fluid Home Page and use the menu structure on the Classic page to navigate as you did in the old system.

Fluid Home Page







Classic Home Page

Favorites * Main Menu *			🚖 Home	Sign out
ORACLE	All 👻 Search	Advanced Search	Add To 👻 🏹	() NavBar
			Personalize Content Layout	? Help

Sample Fliud page



C Employee Self Service	Personal D	Details	â	Q	۲
Medical Records Technician					
🔛 Addresses	Addresses				
😋 Contact Details	Home Address				
Name	30 Douglas Martinez, CA 94553	Current			>
14 Ethnic Groups	Mailing Address				
C Emergency Contacts	30 Douglas	Current			>
Additional Information	Martinez, CA 94553	Guirein			'
🛃 Disability					
🚢 Veteran Status					

Sample Classic page

DRACLE Dependent and Benefic David Grey	All • Searce			Advanced Search	Add To 👻	Notification	NavBa
	iary Informatio	n			New Window Hel	p Personalize	Page I
	ary mornauc						
David Grev							
nformation. Dependent and Beneficiary In Name Relationsh Employee		Marital Status	Dependent	Beneficiary			
Child	05/16/2008	Single	Yes	Yes			
Spouse	05/13/1973	Married	Yes	Yes			
Child	06/12/2011	Single	Yes	Yes			
Child	08/28/2017	Single	Yes	Yes			

Accessing the System for ESS Users

This lesson covers how to

• Sign In and Out of the System



- •
- Change your password Set Up Forgot Password Help •
- Get a password after you have forgotten your password

Signing In

To Sign In:

- 1. Enter your User ID in the User ID field
- 2. Enter your password in the **Password** field
- 3. Click the **Sign In** button

Step	Action
1.	The Sign In page displays.
	To sign in, enter your User ID and your Password. Then click the Sign In button.

ORACLE	
PEOPLESOFT	
User ID	
1	
Password	
Select a Language	
English 🗸	
Sign In Enable Accessibility Mode	
Forgot your password? Set Trace Flags	
 Copyright © 2000, 2015, Oracle and/or its affiliates. All rights reserved	



Step	Action
2.	Enter the desired information into the User ID field. Enter "12345".
	User ID
3.	Click in the Password field.
	Password
4.	Enter the desired information into the Password field. Enter "******".
	Password
5.	Click the Sign In button.
	Sign In
6.	You are now on the Employee Self Service home page.
7.	
	End of Procedure.

Signing Out From a Fluid Page

To sign out from a Fluid page

- 1. Click the Actions icon on banner
- 2. Click the **Sign Out** option

Step	Action
1.	Use the Actions menu on a Fluid page to sign out.



< Employee Self Service	Personal D	etails	<u>ନ</u> ପ୍	
David Grey Medical Records Technician				
Not the set of the set	Addresses			
😋 Contact Details	Home Address			
E Name	30 Douglas Martinez, CA 94553	Current		>
Number 2015 International Inte				
C Emergency Contacts	Mailing Address 30 Douglas	Current		>
Additional Information	Martinez, CA 94553			,
E Disability				
🝊 Veteran Status				

Step	Action
2.	Click the Actions List button.
3.	Click the Sign Out link.
5.	Sign Out
4.	End of Procedure.

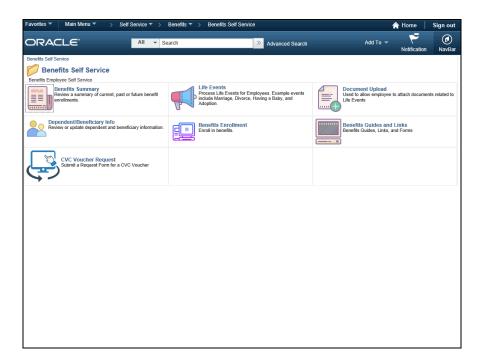
Signing Out from a Classic Page

To sign out from a classic page:

1. Click the Sign Out link on the Menu Bar.



Step	Action
1.	You have navigated to the Benefits Self Service home page. This is a classic page.
	To sign out from a classic page, click the Sign Out link in the Menu bar.



Step	Action
2.	Click the Sign out link.
	Sign out
3.	
	End of Procedure.

Changing Passwords

User IDs

User IDs are

- Assigned by the Project
- All users will be getting a new user id
- Are tied to a set of roles that determine what pages you can access, what you can do on the pages, and what data you can see
- Format: Your Employee ID

Passwords

- New users will be assigned a temporary password
- All users will be required to change their password once they sign in using the **Change My Password** page



- Navigation from Fluid Home Page: NavBar > Navigator > Change My Password
- o Navigation from the Classic Home Page: Main Menu > Change My Password

Favorites Main Menu My Homepage Change My Password
ORACLE [.]
Change Password User ID: DREYN Description: Copy of PS
*Current Password: *New Password: *Confirm Password:
Change Password

- Steps to change password
 - 1. Enter your project supplied password in the Current Password field
 - 2. Enter your new password in the **New Password** field (be sure to confirm to the password rules specified below)
 - 3. Reenter your new password in the **Confirm Password** field
 - 4. Click the **Change Password** button
- Password rules
 - Must be eight characters long--alphanumeric, can contain special characters, and can be upper, lower, or mixed case
 - Can be the same your user ID or your primary email (business email)
 - You must create a new password once a year (expires in 365 days)—you will receive a warning email five days prior to the expiration date
 - The last two passwords you used are stored in the system
 - Your account will be locked after 10 failed log-in attempt

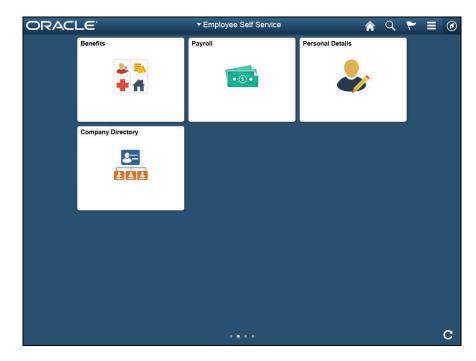
Procedure

Navigation: NavBar > Navigator > Change My Password

This topic uses the fluid navigation. You can also access the Change Password page using classic navigation:

Main Menu > Change My Password





Step	Action
1.	Click the NavBar button.
2.	Click the Navigator button.
	Navigator
3.	Click the Change My Password link.
	Change My Password
4.	The Change Password page displays.
	Use this page to change your password. In this example, your current password is: password1.
	You will change this password to password2.
	Begin by entering your current password in the Current Password field.
	The system will generate an error message if the value you enter in the Current Password field does not match the password that is stored in the system. This validation takes place after you click the Change Password button.



Favorites Main Menu My Homepage Change My Password	🏫 Home
ORACLE	Add To 👻 🏲 Notifical
	New Window Help Personalize Page 🛅
Change Password	
User ID: DREYN1	
Description: ESS	
*Current Password:	
*New Password:	
*Confirm Password:	
Change Password	
Change Password	

Step	Action		
5.	Click in the Current Password field.		
	*Current Password:		
6.	Enter the desired information into the Current Password field. Enter "password1".		
	*Current Password:		
7.	Notice, the system masks your password.		
	Next enter your new password in the New Password field.		
8.	Click in the New Password field.		
	*New Password:		
9.	Enter the desired information into the New Password field. Enter "******".		
	*New Password:		
10.	Notice, your new password is masked. The system automatically masks passwords.		
	Next re-enter your new password in the Confirm Password field.		
	The passwords you enter in the New Password and Confirm Password fields must		
	match exactly. If they do not match exactly, re-enter values in both fields taking care that you enter the same value in both fields. The system generates an error message		
	after you click the Change Password button if the values in these two fields do not		
	match.		



OK

Password field. This enables the system to

Here's the message the system generates if the values you enter in the New Password and Confirm Password fields do not match. Click OK and re-enter values it both fields.

Message
The Password field does not match the Confirm Password field. (48,17)
To assign a password, the password you type in the Password field must be the exact same as the password you type in the Confirm verify that you've entered it correctly.

Step	Action
11.	Error Message
12.	Click in the Confirm Password field.
	*Confirm Password:
13.	Enter the desired information into the Confirm Password field. Enter "******".
	*Confirm Password:
14.	Click the Change Password button.
	Change Password
15.	Click the OK button.
	ОК
16.	Click the Home link.
	A Home
17.	
	End of Procedure.

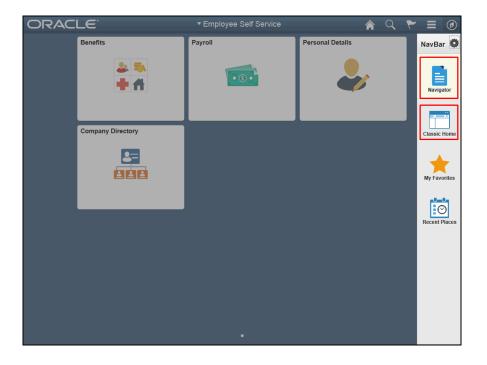
Using My System Profile

Use **My System Profile** to set up your forgot password help question and answer. You can also use this component to change your password.



ORACLE	▼ Employee Self Service		â	Q	۲	۲
Benefits	Payroll	Personal Details	`			
Company Directory					_	
						c

Step	Action
1.	Click the NavBar button.
	$\widehat{} \ \bigcirc \ \overleftarrow{} \ \overrightarrow{} \ $





Step	Action
2.	You can access the My System Profile page using Navigator or from the Main Menu on your classic home page. For this example, you will use Navigator .
3.	Click the Navigator button.
4.	Click the My System Profile menu.

Favorites Main Menu My System Profile	🏫 Home Sign out
ORACLE	Add To 👻 🌄 🙆 Notification NavBar
	New Window Help Personalize Page 🔤 🔥
General Profile Information	
Don Smith	
Password	
Change password	
Change or set up forgotten password help	
Personalizations	
My preferred language for PIA web pages is: English	
My preferred language for reports and English v email is	
Currency Code Q Default Mobile Page Q	
Alternate User	
If you will be temporarily unavailable, you can select an alternate user to receive your routings. Alternate User ID Q	
From Date (example:12/31/2000)	
To Date (example:12/31/2000)	
Workflow Attributes	
Email User Worklist User	
Miscellaneous User Links	
Email Personalize Find 🔄 🔣 First	⑨ 1 of 1 ⑧ Last
Primary Email Account Email Type Email Address	
IM Information Personalize Find 🖾 🧱 First 🔇	V 1 of 1 D Last



Step	Action
5.	The General Profile Information page displays.
	You can use this page to access the Change Password page. The page is also used to work with your forgot password questions.
	You do not need to change or enter any values on this page.
	Start with reviewing the change password page.

Favorites 🔻 Main Menu 🔻 > My System Profile	🟫 Home 🔰 Sign out
DRACLE	Add To 👻 🏹 🙆 Notification NavBa
	New Window Help Personalize Page 🗐
General Profile Information	
Don Smith	
Password	
Change password	
Change or set up forgotten password help	
Personalizations	
My preferred language for PIA web pages is: English	
My preferred language for reports and English email is Currency Code Q	
Default Mobile Page	
Alternate User	
If you will be temporarily unavailable, you can select an alternate user to receive your routings.	
Alternate User ID	
From Date (example:12/31/2000)	
To Date (example:12/31/2000)	
Workflow Attributes	
Email User Worklist User	
Miscellaneous User Links	
Email Personalize Find 🖾 🧱 First 🕚 1 of 1 🛞 La	ast
Primary Email Address	
IM Information Personalize Find 💷 🧱 First 🚯 1 of 1 🛞 La	ist

Step	Action
б.	Click the Change password link.
	Don Smith
	Password
	Change password
	Change or set up forgotten password help



Favorites 🔻	Main Menu 🔻 >	My System Profile			🟫 Home	Sign out
ORAC	ELE.			Add To 🤜	Notification	() NavBar
Change pas		Cancel	1 2 3			NavBar

Step	Action					
7.	The Change Password page displays. You can use this page to change your current password:					
	1. Enter your current password in the Current Password field					
	2. Enter your new password in the New Password field					
	3. Enter your new password in the Confirm Password field					
	4. Click the OK button.					
	Changing passwords is covered in other topics in Navigation training.					
	Note you can also navigate directly to this page using the Change My Password link on the Navigator (Fluid and Classic pages) and/or on the Main Menu (Classic pages).					
	For this topic, you will not change your password.					



Favorites 🔻 Main Menu 🔻	> My System Profile		1	Home	Sign out
ORACLE [®]			Add To 👻	Notification	ø NavBar
			New Window He	p Personaliz	e Page 📰
Change password					
Current Password	d				
New Password	d la				
Confirm Password	d				
OK	Cancel				

Step	Action
8.	Click the Cancel button.
	Change password Current Password New Password Confirm Password OK Cancel



Favorites ▼ Main Menu ▼ > My System Profile				🟫 Home 🛛	Sign out
ORACLE'			Add To 🔻	۲	٢
			N	Notification	NavBar
			New Window Help	p Personalize F	'age 📖
General Profile Information					
Don Smith					
Password					
Change password					
Change or set up forgotten password help					
Personalizations					
My preferred language for PIA web pages is: English					
My preferred language for reports and English v email is					
Currency Code					
Default Mobile Page					
Alternate User					
If you will be temporarily unavailable, you can select an alternate user to receive your routings.					
Alternate User ID					
From Date (example:12/31/2000)					
To Date (example: 12/31/2000)					
Workflow Attributes					
Email User Worklist User					
Miscellaneous User Links					
Email Personalize Find [3]	📕 🛛 First 🕚	🔍 1 of 1 🛞 Last			
Primary Email Account Email Type Email Address					
		+ -			
IM Information Personalize Find 🖾	🖌 🛛 First 🕚	1 of 1 🕑 Last			````

Step	Action
9.	Click the Change or set up forgotten password help link.
	General Profile Information
	Don Smith
	Password
	Change password
	Change or set up forgotten password help



Favorites Main Menu My System Profile	襘 Home	Sign out
ORACLE [®]	Add To 👻 🧮 Notification	n NavBar
Change or set up forgotten password help	New Window Help Personal	ize Page 📰 -
If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authenticate you. Question		
Select from the list of questions. Response OK Cancel		

Step	Action
10.	The Change or set up forgotten password help page displays.
	You can use this page to either change the question and/or answer that is used to authenticate you, if you forget your password if you have previously set up a forgot password question/response or to create one for the first time.
	Begin by selecting a question from the Question drop down list. You can only set up one forgot password question.



Favorites Main Menu My System Profile	🏫 Ho	me	Sign out
	d⊤o ~ Not	r ification	NavBar
New Wir	ndow Help P	ersonalize	Page 🔤
Change or set up forgotten password help			
If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authenticate you.			
Question			
Select from the list of questions.			
Response			
OK Cancel			

Step	Action
11.	Click the Question list.
	Change or set up forgotten password help
	Enter a question and your response below. These will be used to authenticate you. Question
	Select from the list of questions. Response OK Cancel



Favorites 🔻 Main Menu 🔻 > My System Profile	🟫 Home	Sign out
ORACLE' Add To	Notification	NavBar
New Window	Help Personali	ze Page 📰 -
Change or set up forgotten password help		
If you forget your password, you can have a new password emailed to you.		
Enter a question and your response below. These will be used to authenticate you.		
Question In what dity or town did your parents meet? In what of the model canced your youngest child? What is the name of your fast pol? OK Car What is the name of your fast pol? What is the name of your fast pet? What is the name of your fast name? What is the outleds neplevel sits name? What is the is your eldest neplevel sits name? What is your modered gradmother's maken name? What is your modered gradmother's maken name? What is the name of your favorite sour? What is the name of your favorite sour? What is your modered gradmother's maken name? What street did you won third grade? What street did your out favorite teacher? What was the name of your filtementary school? What was the year and model of your first car?		

Step	Action
12.	Click the What is the name of your first pet? list item.
	Question In what city or town did your parents meet? In what city or town was your first job? What is the middle name of your gargets child? What is the name of your gargets child? OK Gar What is your eldest noise? What is the name of your gargets child? What is the name of your gargets child? What is your eldest noise? What is your failed for anne? What is your matering another's maiden name? What is your matering another's furthule? What is your matering another's maiden name?
	What was the last name of your favorite leacher? What was the name of your demoting leacher? What was the year and model of your first car?



Favorites 🔻	Main Menu 🔻 > My System Profile	🟫 Hom	ie	Sign out
ORAC	LE' Add To 🗸	- 7	cation	DavBar
	New Window	Help Pers	sonalize	Page 🛛 📰 -
Change or s	et up forgotten password help			
	our password, you can have a new password emailed to you. on and your response below. These will be used to authenticate you.			
Que	stion What is the name of your first pet?			
Resp				
OK	Cancel			

Step	Action
13.	Next, you will enter the answer to the question you selected in the Response field. The answer you enter here will be used to authenticate you, if you need to reset your password after you have forgotten your password.

Favorites Main Menu My System Profile	🏫 Home	Sign out
ORACLE [®]	Add To 👻 🧲 Notificatio	
	New Window Help Persona	lize Page 🛅
Change or set up forgotten password help		
If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authenticate you.		
Question What is the name of your first pet?		
Select from the list of questions. Response OK Cancel		



Step	Action
14.	Click in the Response field. Change or set up forgotten password help If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authenticate you. Question What is the name of your first pet? Select from the list of questions. Response OK Cancel
15.	Enter the desired information into the Response field. Enter "Buddy". Change or set up forgotten password help If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authenticate you. Question What is the name of your first pet? Select from the list of questions. Response OK Cancel
16.	Click the OK button. Change or set up forgotten password help If you forget your password, you can have a new password emailed to you. Enter a question and your response below. These will be used to authentica Question What is the name of your first pet? Select from the list of questions. Response Buddy x OK Cancel

Favorites 🔻 Main Menu 🔻 > My System Profile	🟫 Home 🔰 Sign out
ORACLE'	Add To 👻 🏹 🕖 Notification NavBar
General Profile Information Don Smith Password Change password Change or set up forgotten password help	New Window Help Personalize Page 🚍 🥿
Personalizations My preferred language for PIA web pages is: English My preferred language for reports and [English Currency Code Currency Curr	
If you will be temporarily unavailable, you can select an alternate user to receive your routings. Alternate User ID From Date	
Workflow Attributes Ø Email User Ø kindeneous User Links	
Email Personalize Find (2) (3)	



Step	Action
17.	Click the scrollbar.
18.	Click the Save button. Primary Email Account Email Type IM Information Protocol XMPP Domain UserID XMPP Q
19.	Click the Home link.
20.	End of Procedure.

Forgot Password

Use the Forgot Your Password? link on the Sign In page to begin the process of recovering/resetting your password.

PEOPLESOFT	
User ID	
Password	
Select a Language English	~
Enable Accessibility Mo Forgot your password? Set Trace Flags	
Copyright © 2000, 2015, Oracle and/or its affiliates	es. All rights reserved.



Step	Action
1.	The PeopleSoft Sign In page displays. You realize that you have forgotten your password and will need to reset it.
	Use the Forgot your password? link.

PEOPLESOFT	
User ID	
Password	
Select a Language English	
Sign In Enable Accessibility Mode Forgot your password? Set Trace Flags	
Copyright © 2000, 2015, Oracle and/or its affiliates. All rights reserved.	

Step	Action
2.	Click the Forgot your password? link.
	Forgot your password?
3.	The system opens the Forgotten Password page. You can use this page to begin the process that will allow you to create a new password if you have forgotten yours or if yours has expired.
4.	Enter your User ID in the User ID field.
	Enter the desired information into the User ID field. Enter "12345". User ID
5.	Click the Continue button. Continue



	Security Question	Q 🔳
User ID 71334		
Please answer the following question below for us	ser validation.	
Question	What was the name of your elementary school?	
Response		
	Email New Password	

Step	Action
6.	The Security Question page displays the question you selected when you set up your forgot password help using My System Profile . Enter the answer you provided on the My System Profile pages.
7.	Enter the desired information into the Response field. Enter "MARYVALE". Response



	Security Question	Q	
User ID 71334			
Please answer the following question below for us	er validation.		
Question	What was the name of your elementary school?		
Response	MARYVALE ×		
	Email New Password		

Step	Action
8.	Next, use the Email New Password button to have instructions sent to you for how to create a new password. The system will use your email address.
	Note: If you have more than one email in the system, the system will display a pop up window that will enable you to select the email to use.
9.	Click the Email New Password button.
	Email New Password
10.	The Email Confirmation page displays.
	The system will send an email with instructions for how to reset your password.
11.	
	End of Procedure.

Home Page

The one topic in this lesson provides an overview of the Fluid and classic home pages that you will encounter when using Employee Self Service.

Employee Self Service Home Page

This topic provides an overview of the Employee Self Service home page and it its key features.



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	Benefits	Payroll	Personal Details			
Banner	1		Tiles			
						C

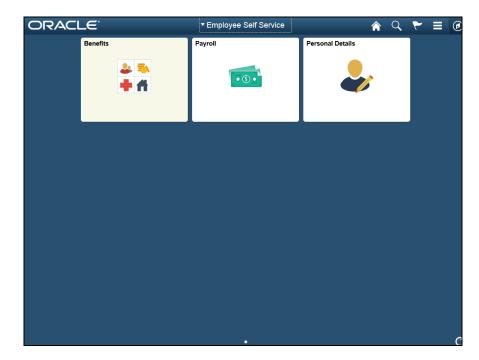
Step	Action
1.	As a Employee Self Service user, when you sign in to the system you will landed on the Employee Self Service home page, a Fluid page.
	This page displays now.
	The key elements on this page are:
	The banner that appears at the top of the page A set of Tiles that provide access to PeopleSoft components
	In this topic you will explore each. Your start with the tiles.





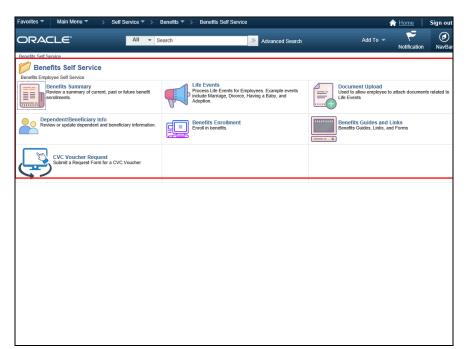
Step	Action
2.	There are three tiles on the Employee Self Service home page:
	 Benefitsthis tile provides access to eBenefits Payroll: this tile provides access to ePay Personal Details: this tile provides access to eProfile
	You explore each of this in this topic. Each is covered in greater detail in other part of PeopleSoft Training.
	Your start with the Benefits tile.





Step	Action
3.	Click the Benefits button.





Step	Action
4.	The Benefits Self Service page displays. This page is a classic page. Working with classic pages is covered later in this topic.
	This page provides links that enable you to
	- Review your benefits elections
	- Review and edit your dependent/Beneficiaries
	- Review and adjust allocations on savings (deferred compensation) plans and life
	insurance
	- Add beneficiaries
	- Change enrollments as part of a life event
	- Enroll in benefits during open enrollment or at the time of hire/rehire
	- Upload supporting documents
	- Access benefit plan guides, benefits forms, and provider links
	- Request a CVC voucher
5.	Click the Home link to return to the Employee Self Service Home page.
	A Home Sign out
	Add To - Notification NavBar
	Document Upload Used to allow employee to attach documents related to



Step	Action						
6.	Next you will use	Next you will use the Payroll tile.					
	Click the Payroll	Click the Payroll tile.					
	Benefits	Payroll	Personal Details				
	2 5 4 A	• 6 •	a				

< Employee Self Service			Payroll Self S	ervice			Q	=	Ø
David Grey Medical Records Technician	_								
🗮 Pay Checks	Р	ay Check	s						
🗯 Direct Deposit		Ŧ						î.	
W-4 Tax Information		Check	Company	Pay Begin Date / Pay	Net Pay	Paycheck N PDF Check	umber /		
DE4 State Tax Information		Date	oompany	End Date		PDF Check			
Voluntary Deductions		07/10/2017	Contra Costa County	06/01/2017 06/30/2017	\$2968.75	865574		>	
💬 Advance Pay		06/09/2017	Contra Costa County	05/01/2017 05/31/2017	\$1.00	863767		>	
		05/10/2017	Contra Costa County	04/01/2017 04/30/2017	\$1512.78	861944		>	

Step	Action
7.	The Payroll Self Service page displays.
	You can use the links in the Action panel on this page to:
	View your paycheckManage you direct deposit (request, edit, delete)
	- Review and update your W-4 and DE-4 tax information
	Manage your voluntary deductions (add, edit, cancel)Manage advance pay (request, edit, cancel)

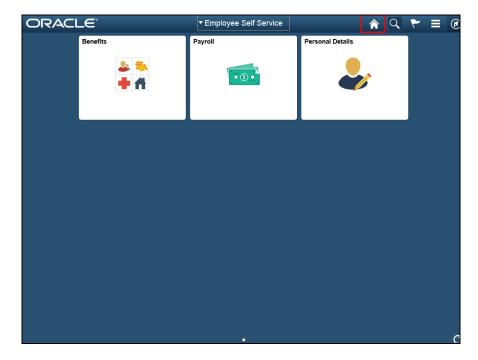


Step	Action					
8.	Click the Home button to return to the Employee Self Service home page.					
	$ \ \ \ \ \ \ \ \ \ \ \ \ \ $					
9.	Next you will review the Personal Details tile.					
	Click the Personal Details object.					
	Benefits Payroll Personal Details					

Personal D	etails	<u>ନ</u> ୍	
Addresses			
Home Address			
30 Douglas Martinez, CA 94553	Current		>
Mailing Address			
30 Douglas	Current		>
Martinez, CA 94553			
	Addresses Home Address 30 Douglas Martinez, CA 94553 Mailing Address	Addresses Home Address 30 Douglas Martinez, CA 94553 Current Mailing Address 30 Douglas	Addresses Home Address 30 Douglas Martinez, CA 94553 Current Mailing Address 30 Douglas Current



Step	Action		
10.	The Personal Details page displays.		
	You can use the links in this page to		
	- Review and edit your address information		
	Review and edit your e-mail and phone informationRequest a name change		
	- Manage your emergency contacts (add, edit, delete)		
	- Review additional information about yourself		
	- Update your disability and veteran statuses		
11.	Click the Home button to return to the Employee Self Service home page.		



Step	Action
12.	Next you will explore the icons that appear on the banner.
	You have already used the Home icon.
	This navigates back to your fluid home page





Step	Action			
13.	Next, you will briefly explore the Global Search icon.			
	This icon allows you to search by navigation. Global Search is used more by core users than Employee Self Service Users.			
14.	Click the Global Search button.			
15.	Click the Category list.			
	▼ Employee Self Service			
	'ayroll All 🔽 Search 📎			





Step	Action			
16.	Notice, the drop down for global search contains two optionsAll and Navigator. You can use Global Search to search for specific navigations.			
17.	Click away from the Drop down to close it.			
18.	Click the Search button to display advanced search features.			



< Employee Self Service	Search Results	Â	Q	۲	Ø
✓ New Search	View Search Results				
Category					
All V Keywords					
More Options					
Search Clear					

Step	Action
19.	The Search Results page displays. You can use the New Search panel to set search criteria.
20.	Click the Category list. New Search Category All Keywords
21.	Click the Navigator list item. Navigator
22.	Next, you will review the Notifications Icon.
23.	Click the Notifications button.



New Search View Search Results Actions Alerts View All O Category Navigator Keywords Image: Search Results Image: Search Results
More Options Search Clear

Step	Action				
24.	The Notifications window displays.				
	There are two tabs, Actions and Alerts.				
	Actions are links that take you directly to a page on which you must perform an action, i.e. an approval.				
25.	Click the Alerts button.				
	ults 🏫 🔍 🍸				
	Actions Alerts View				



< Employee Self Service	Search Results		🏫 🤇 🏲 🗏 @
✓ New Search	View Search Results	Actions Alerts	View All 🛛 C ⁴
Category			
Navigator V Keywords			
Reywords			
More Options			
Search Clear			
	Γ		

Step	Action
26.	Alerts are links that take you to a page where some data or a status has changed.
27.	Click away from the Notifications window to close it.
28.	Click the Home button.
	A V E @
29.	Next, you will explore the Actions List.
30.	Click the Actions List button.
	A C Y E 🕢 Details



ORAC	LE.		▼ Employee :	Self Service		â	Q,	۲	۲
	Benefits		Payroll		Personal De	Personaliz	e Homepa	age	
		2 🎭		•		Help			
		+ 1				Sign Out			
				•					Ċ

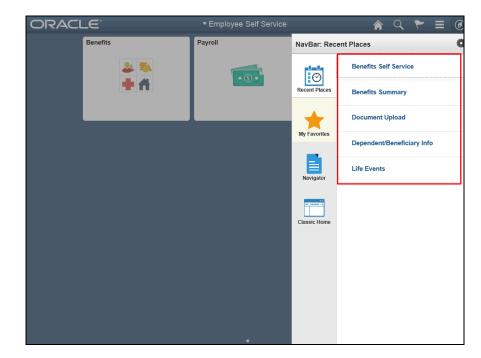
Step	Action			
31.	The Actions List menu displays a set of actions that are available to you.			
	This list will vary depending on your security and what page you are on.			
32.	Click away from the Actions List to close it.			
33.	Click the NavBar button.			
	A < < ≡			
	Petails			





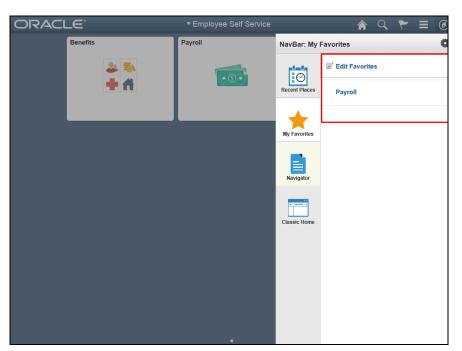
Step	Action
34.	The NavBar displays.
	By default, four icons display. You can change the order this display using the Personalize the NavBar button. These four icons are:
	Recent Places
	My Favorites
	Navigator
	Classic Home
35.	Click the Recent Places button.
	Navdar C
	The second secon
	N FRANK
	Cases How





Step	Action
36.	Recent Places display.
	This section contains links to pages that you have visited recently.
37.	Click the My Favorites button.
	Reset Form
	Come tree





Step	Action
38.	My Favorites display.
	This section of the NavBar contains links to pages that you have marked as favorites.
	Working with favorites is covered in other topics.
39.	Click the Navigator button.
	Nordian My
	b) marke
	Response to the second s



ORACLE		▼ Employee Self Service		Â	Q	۲	
Benefit	s	Payroll	NavBar: Navi	igator			•
	2 3		Ö	CCC HR C	ustom		>
* #	**		Self Servio	e		>	
			*	Manager S	elf Servic	e	>
			My Favorites	Benefits			>
			Navigator	Enterprise	Compon	ents	>
				Worklist			>
			Classic Home	Reporting	Tools		>
				PeopleToo	ls		>
				Change M	y Passwo	rd	
				My Systen	Profile		
				My Diction	ary		

Step	Action
40.	The Navigator displays a set of links. These links are the same links that appear on the Main Menu on a classic page.
	The links that you will see depend on your security. You will see the links that you will need to use to complete job tasks.
41.	Click the Classic Home button.
	by Ferning
	Registre
	Catalo Harris



Favorites Main Menu			😭 Home	Sign out
ORACLE	All - Search	Advanced Search	Add To 👻 🚩 Notification	Ø NavBar
			Personalize Content Layout	? Help

Step	Action
42.	The Classic Home page displays. All classic pages have the Menu Bar and the Banner that appear at the top of the page.
	In this topic, you will explore each of the features on the Menu Bar and Banner:
	- Favorites
	- Main Menu
	- Home
	- Sign out
	- Add To
	- Notification
	- NavBar



avorites 🔻 Main Menu 🔻			🏫 Home 🔤	Sign out
DRACLE	All V Search	Advanced Search	Add To 👻 🚩 Notification	Ø NavBa
			Personalize Content Layout	? He

Step	Action				
43.	Click the Favorites button.				
	Favorites Main Menu Main Menu				
	ORACLE				



orites 🔻 Main Menu 🕆		🟫 Home	Sign out
Recently Used	Search Advanced Search	Add To 👻 🚩 Notification	Ø NavBar
 Dependent/Beneficiary Info Life Events Document Upload Modify a Person Dependent Information VF J=vortites Add to Favorites Edit Favorites Payroli 		Notification Personalize Content Layout	NavGar

Step	Action			
44.	The Favorites menu displays. This menu contains two sections:			
	- Recently Used: this section lists pages you have recently visited			
	- My Favorites : this section contains two links that allow you to manage your favorites (Add to Favorites and Edit Favorites). It also lists pages that you have identified as favorites.			
	Note: Working with favorites is covered in other portions of Navigation training.			
45.	Click away from the Favorites menu to close.			
46.	Click the Main Menu button.			
	Main Menu 🔻			
	All - Search			



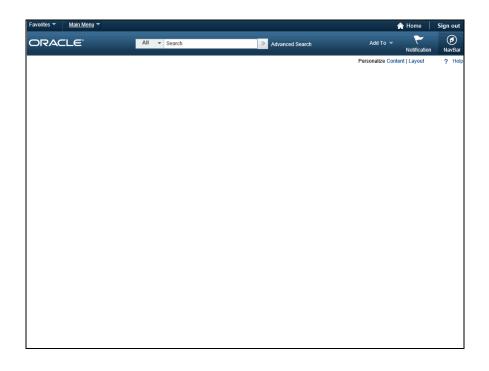
Favorites 🔻	Main Menu 🔻				🟫 Home 📗	Sign out
ORACI	Search Men		»	Advanced Search Add To 👻	Notification	Ø NavBar
	CCC HF	R Custom		Personalize Cor	tent Layout	? Help
	Compar	ny Directory				
	🗀 Self Ser	vice				
	🗀 Manage	r Self Service				
	🗀 Benefits					
	🗀 Enterpri:	se Components				
	🗀 Worklist					
	🗀 Reportin	ng Tools				
	🗀 PeopleT	ools				
	Change	My Password				
	My Syst	em Profile				
	My Dicti	onary				

Step	Action
47.	The Main Menu displays. You can use the links on this menu to navigate to other portions of PeopleSoft.
	The links that you will see will depend on your security. You will be able to see the links that you'll need to do your job. The links that display here are typical of what Employee Self Service Users will see. Depending on your role, you may see additional links.
	If you currently use PeopleSoft, the Main Menu will be familiar.
48.	Click away from the Menu to close it.



avorites 🔻 Main Menu 🔻			🏫 Home 🗌	Sign out
ORACLE	All - Search	Advanced Search	Add To 👻 🚩 Notification	Ø NavBar
			Personalize Content Layout	? Hel

Step	Action
49.	You can use the Search feature to search on Navigation.
	For this topic, you will not explore this further.



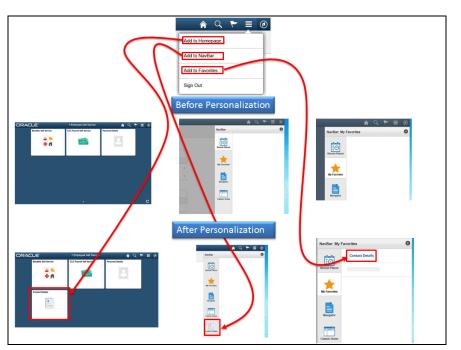


Step	Action
50.	Click the Add To link.
	A Home Sign ou
	Add Io 🔽 🚩 🥑 Notification NavB
	Personalize Content Layout ? H

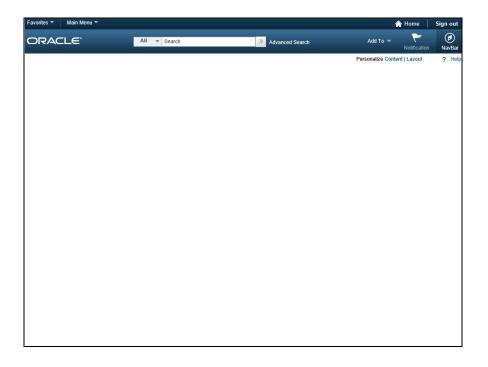
Favorites 🔻 Main Menu 🔻	> ""		😭 Home 📗 Sign ou
ORACLE	Navigator 👻	>> Advanced Search	Add Tol - Ko ification NavBa
			Homepage
			NavBar
			Favorites

Step	Action
51.	The Add To menu displays.
	You can use the options on this menu to
	 Add the page you are on to your Fluid Home page Add an icon for this page to the NavBar Add this page to your favorites





Step	Action
52.	Examples of Personalization.
53.	Click away from the Add To menu to close it.





Step	Action		
54.	Click the Notification button.		
	🕎 Home 🛛 Sign out		
	Add To 👻 🚩	Ø NavBar	
	Personalize Content Layout	? Help	

Favorites 🔻 Main Menu 🔻				1	🕈 Home	Sign out
ORACLE [.]	All - Search	» Advance	ed Search	Add To 👻	Notification	Ø NavBar
			Actions Alerts		View All	C e

Step	Action
55.	The Notification window displays. This window displays two buttons:
	 Actions: links to transactions that require your attention, i.e., a request that is awaiting your approval Alerts: links to transactions where a status or other information may have changed
	These links enable you to go directly to the page that requires your action or which displays the changed status/information.
	For this example, you have no actions or alerts.



Step	Action
56.	Click the Alerts button.
57.	Click away from the window to close it.
58.	Click the NavBar button. Add To Home Sign out Add To Notification NavBar Personalize Content Layout Personalize Content Layout Help

Favorites 🔻 Main Menu 🔻			🟫 Home 🔰 Sign out
ORACLE [®]	All - Search	Advanced Search	Add To 👻 🚩 🕖 Notification NavBa
			Personalize Content Layo
			Recent Places
			My Favorites
			Navigator
			Classic Home



Step	Action
59.	The NavBar displays. By default, this bar displays four icons: Recent Places My Favorites Navigator Classic Home The NavBar on a classic page is identical to the NavBar that displays on a Fluid page.
60.	Click away to close the NavBar .
61.	Click the Home link.
62.	End of Procedure.

Fluid Page Elements

This lesson covers the use of Fluid Page Elements, e.g., drop down lists, check boxes, text entry, entering dates and/or phone numbers, lookups, grids, etc.. These elements are used to complete transactions using fluid pages. The topics covered in this lesson are important to all users of the new system—Employee Self Service users, Managers, and Core Users.

The following topics are included in this lesson:

- Using the Action Panel
- Using the Information Panel
- Using Drop Down lists
- Using Text Entry Fields
- Using Add New Buttons
- Using Check Boxes
- Using Sliders
- Using Save/Cancel Buttons
- Using Confirmation Pages
- Entering Dates
- Using the Calendar Icon to Select Dates
- Entering Phone Numbers
- Using Lookups
- Working with Grids
- Using Tabs
- Using Related Actions
- Using Decision Support



These topics are available for play-back through the UPK player in

- See-It! Mode—allows you to attach a "video" demonstration of the topic
- Try-It! Mode—allows you to use your mouse and keyboard to complete transactions in a simulated environment

Both See-It! And Try-It! provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Payer are also available in two printed documents—a Training Guide and a Job Aid.

Using the Action Panel

The action panel appears to the right on many fluid pages. This panel provides links which allow users to access portions of a PeopleSoft component. Actions panels are particularly prominent in the Employee Self Service portion of PeopleSoft.

Here is an example of an Action panel:



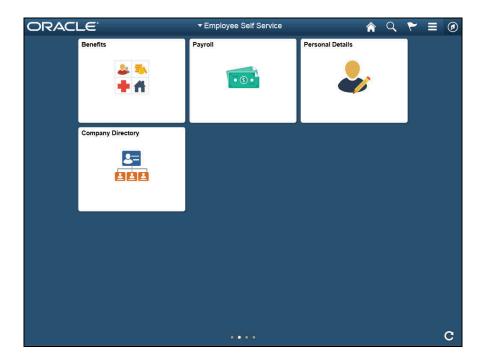
Clicking a link in the Action Panel changes the information displayed in the Information panel that appears on the left.

Information Panel	Pers	onal Details	😭 Q 🏲 🗏 (
ASSTUR RESOUR	ofts-EX		
Addresses	Addresses Home Address		
Name	768 Cindy Lane Livermore, CA 94550 Alameda	Current	>
Emergency Contacts	Mailing Address		
bisability	768 Cindy Lane Livermore, CA 94550 Alameda	Current	3
Kc Form 1-9			

Procedure

In this topic you will review using the links in the Action panel. Our example will be from the **Personal Details** page accessed from the **Employee Self Service** home page.





Step	Action			
1.	Click the Personal Details tile.			
	ELE - Employee Self Service 🕋 🔍 🏲 :			
	Benefits	Payroll	Personal Details	



< My Homepage	Persona	I Details	A < ∃	٢
David Smith ⊙	Header Panel			
Addresses © Contact Details I Name E Ethnic Groups	Addresses Home Address 1000 Pine Drive Concord, CA 94518 Contra Costa	Current	>	
Central Contacts	Mailing Address			
🛃 Disability 🛃 Veteran Status	1000 Pine Drive Concord, CA 94518 Contra Costa	Current	>	
Actions Panel				

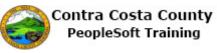
Step	Action
2.	The Personal Details page displays.
	This page contains three panels:
	Header panel Left Side Actions panel Right Side Information panel



< My Homepage	Personal Deta	ils	Â	Q	۲		٢
David Smith 📀							
Addresses	Addresses Home Address						
S Name	1000 Pine Drive Concord, CA 94518 Contra Costa	Current				>	>
C Emergency Contacts	Mailing Address						
الله Disability	1000 Pine Drive Concord, CA 94518	Current				>	>
Leteran Status	Action Panel						

Step	Action
3.	Click on a link in the Actions panel to change what is displayed in the information.
	In this example, you will click on each of the links in the action panel for the Personal Details page.

< My Homepage	Personal Details	♠ ❣ ☰ ∅
David Smith 😔		
Addresses Contact Details Contact Betails Contact Betails Contact Betails Contact Second Seco	Addresses Home Address 1000 Pine Drive Concord, CA 94518 Current Contra Costa	>
Additional Information	Mailing Address 1000 Pine Drive Concord, CA 94518 Current Contra Costa	>



Step	Action
4.	The right side information panel currently displays the Addressees grids. This grid lists your current Home Address and Mailing Address .
	You can use this page to edit one or both of these addresses. Maintaining your address information is covered in another topic in the Contra Costa County Employee Self Service eProfile training.

< My Homepage	Personal Details		ی 🗧 🖌
David Smith 😒			
Addresses Contact Details	Addresses Home Address		
Name thnic Groups	1000 Pine Drive Concord, CA 94518 Contra Costa	Current	>
C Emergency Contacts			
Additional Information	Mailing Address 1000 Pine Drive		
E Disability	Concord, CA 94518 Contra Costa	Current	>
2 Veteran Status			

Step	Action
5.	Next, you'll use the Contact Details link.
	Click the Contact Details link.



< My Homepage	Personal Details			٢
David Smith ⊙				
Addresses Contact Details Name Ethnic Groups Cemergency Contacts Additional Information Disability Veteran Status	Contact Details Phone + Number Extension Email + Email Address	Type Business Type Business	referred ✓	>

Step	Action
6.	The right side information panel now displays your Contact Details . This panel contains two grids:
	Phone : this grid lists your phone numbers as stored in the system. You can store up to 4 phone numberBusiness, Home, Cell, and Pager1.
	Email: this grid lists your email address as stored on the system. Your business email address is stored in the system. You cannot edit or delete this address. You cannot add additional email addresses.
	You can use this page to edit, add, or delete address information. These actions are covered in other topics in Contra County PeopleSoft Employee Self Service eProfile training.
7.	Next, you will use the Name link.
	Click the Name link.



< My Homepage	Personal Details	Â	۲	=	۲
David Smith 📀					
X Addresses	Name				
Contact Details	David Smith Current				>
Name					
ka Ethnic Groups					
C Emergency Contacts					
Additional Information					
🛃 Disability					
🔏 Veteran Status					
_					

Step	Action
8.	The right side information panel now displays your current name information as stored in the system.
	You can use this page to request that your name information be changed. This action is covered in another topic in Contra Costa County PeopleSoft Employee Self Service eProfile training.
9.	Next you will use the Ethnic Groups link. Click the Ethnic Groups link. Ethnic Groups



< My Homepage	Personal Details		۲	Ξ	Ø
David Smith 📀					
Addresses Contact Details Name Ethnic Groups C Emergency Contacts Additional Information Disability Veteran Status	Ethnic Groups White Primary Voluntary Self-Identification Subject to certain governmental recordkeeping and reporting re administration of civil rights laws and regulations in order to comply with these administration of civil rights laws and regulations. In order to comply with these administration of civil rights laws and regulations in order to comply with these administration of civil rights laws and regulations. In order to comply units of applicab and regulations, including those that require the informatic government for civil rights enforcement. When reported, data will not identify an pro the purposes of EEOC reporting, the following race/ethnic categories will be White (not of Hispanic origin): All persons having origins in any of the origil North Africa, or the Middle East. Black (not of Hispanic origin): All persons having origins in any of the Blacd Hispanie: All persons of Mexican, Puerto Rican, Cuban, Central or South An culture or orgin, regardless of race. Asian or Pacific Islander: All persons having origins in any of the original pe Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area incl India, Japan, Korea, the Philippine Islands, and Samoa. American Indian or Alaskan Native: All persons having origins in any of the America, and who maintain cultural identification through tribal affiliation or or	aws, the of formation on obtained and report y specific used: nal people k racial gr nerican, o eoples of i ludes, for e original j	employee n is volu ed will be executive ted to the individu es of Eu roups of or other \$ the Far I example peoples	er invite ntary a e kept e order e feder ial. rope, Africa. Spanisl East, e, Chin of Nor	nd s, ral h

Step	Action
10.	The right side information panel now displays your current Ethnic Group Self Identification.
	You can use this page to edit, add, or delete an ethnic group self identification. These actions are covered in other topics in Contra Costa County PeopleSoft Employee Self Service eProfile training.
11.	Next you will use the Emergency Contacts link. Click the Emergency Contacts link. Emergency Contacts



< My Homepage	Perso	nal Details	A ۲	=	۲
David Smith ⊙					
X Addresses	Emergency Contact	ts			
Contact Details	+				
ST Name	Contact Name	Relationship	Preferre	d	
Kathe Stranger Strang	James				
Emergency Contacts	James	Sibling	~		>
Additional Information	Susan Jones	Friend		3	>
الله Disability					
Veteran Status					

Step	Action
12.	The right side information panel now displays your current emergency contact information.
	You can use this page to add, edit, and/or delete emergency contacts.
	These actions are covered in other topics in Contra Costa County PeopleSoft Employee Self Service eProfile training.
13.	Next, you'll use the Additional Information link.
	Click the Additional Information link. Additional Information



< My Homepage	Personal Details	â	۲	Ξ	٢
David Smith 😔					
Č					
X Addresses	Additional Information				
Contact Details					
🔚 Name	Gender Male				
Ethnic Groups	Date of Birth 09/11/1984				
Emergency Contacts	Birth Country United States				
•	Birth State				
Additional Information	Social Security Number				
🛃 Disability	Smoker				
A Veteran Status	Date Entitled to Medicare				
-	Original Start Date 09/25/2006				
	Last Start Date 10/13/2008				
	Highest Education Level A-Not Indicated				
	Voluntary Self-Identification				
	Contact the Human Resources department if any of your Employee Information	i is inco	prrect.		

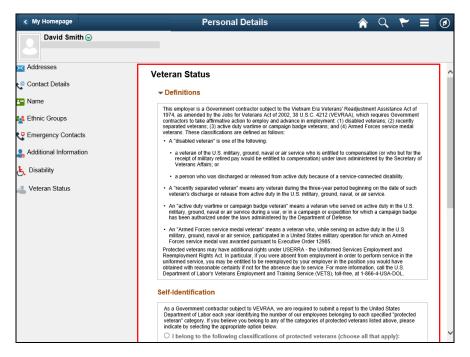
Step	Action
14.	The right side information panel now displays additional information. This information is presented in view only mode. You cannot edit or delete this information. If any of this information is incorrect, you must contact Human Resources to have it
	changed.
15.	Next, you will use the Disability link.
	Click the Disability link.



🔇 My Homepage	Personal Details 🛛 🏫 🔍 🏲	
David Smith 🕑		
Addresses	Voluntary Self-Identification of Disability	
Contact Details	Form OMB Control Number 1.	
Name	Expires 1 Why are you being asked to complete this form?	1/31/2017
🛃 Ethnic Groups	Because we do business with the government, we must reach out to, hire, and provide equal opportunity to qualif	
Emergency Contacts	people with disabilities. ¹ To help us measure how well we are doing, we are asking you to tell us if you have a disa or if you ever had a disability. Completing this form is voluntary, but we hope that you will choose to fill it out. If yo applying for a job, any answer you give will be kept private and will not be used against you in any way.	ability u are
Additional Information	If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we are required to ask all of our employees to update their information every five years. You	may
5 Disability	voluntarily self-identify as having a disability on this form without fear of any punishment because you did not iden having a disability earlier.	
Veteran Status	How do I know if I have a disability?	
	You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a history or record of such an impairment or medical condition Disabilities include, but are not limited to: • Bindness • Autism • Dearless • Cerebral palsy • Cancer • HV/AIDS • Diabeter • Epilepsy • Ventorby • Bipolar disorder • Major depression • Major depression • Major depression • Major depression • Diabeter • Epilepsy • Ventorby • Post-traumatic stress disorder (PTSD) • Obsessive compulsive disorder a vih • Intellectual disability (previously caled relatadian)	eelchair
	Please select one of the options below:	
	YES, I HAVE A DISABILITY (or previously had a disability)	
	NO, I DON'T HAVE A DISABILITY	
	□ I DON'T WISH TO ANSWER	
	Your Name Today's Date	

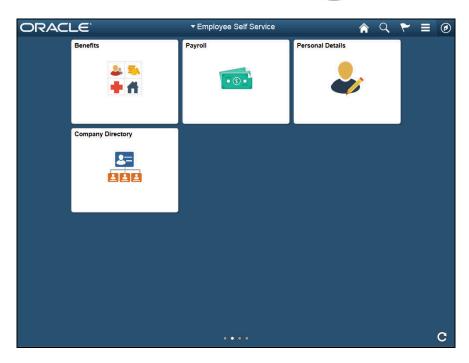
Step	Action
16.	The Voluntary Self-Identification of Disability page displays in the information panel. You can use this page to indicate whether or not you have a disability. Or you can
	decline to answer.
17.	Next you will use the Veteran Status link. Click the Veteran Status link. Veteran Status





Step	Action
18.	The Veteran Status page displays in the information panel.
	Use this page to indicate your status as a veteran If you are not a veteran you can also indicate that using this page.
19.	Click the My Homepage button.
	< My Homepage





Step	Action
20.	Note : You can click the links in the Action panel in any order. You do not have to start with the top link as we did in this example. You can start with any link you want and click only those links that you want to work with.
21.	End of Procedure.

Using the Information Panel

Information panels display details about the Action panel item that was selected. Often these panels allow users to edit, add, or delete information. Information in an information panel is displayed in a grid.

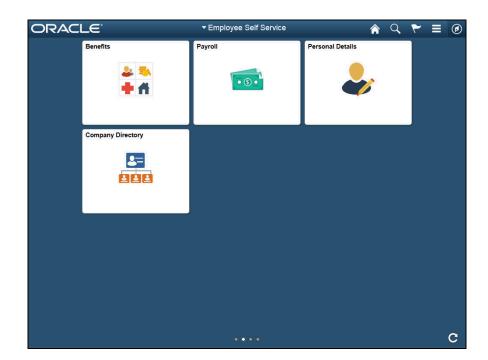
Here's an example of an Information panel.

Pers	onal Details	ନ ୯ ♥ ≣ (
J-EX		
Addresses		
Home Address		
768 Cindy Lane		
Livermore, CA 94550 Alameda	Current	,
Mailing Address		
768 Cindy Lane Livermore, CA 94550	Current	3
Alameda		
	S-EX Addresses Home Address 780 Cindy Lane Livermore, CA 94550 Alameda Mailing Address 786 Cindy Lane	Addresses Home Address P30 Crofy Line Livemore, CA 94550 Atrends Mailing Address 780 Crofy Line Livemore, CA 94550 Current Livemore, CA 94550 Current

In this example, clicking on one of the addresses listed in the **Addresses** grid, opens a page that allows you to edit the address.

Procedure





Step	Action
1.	This example demonstrates how to use Information panels to add or edit information. All examples are drawn from the eProfile, Personal Details page. See Employee Self Service Training: eProfile for details about navigation and eProfile transactions.



< My Homepage	Personal D	Personal Details		
David Smith ⊙			<u>ନ</u> ୍	
Addresses	Addresses Home Address			
Same Lithnic Groups	1000 Pine Drive Concord, CA 94518 Contra Costa	Current		>
Contacts	Mailing Address			
Lisability	1000 Pine Drive Concord, CA 94518	Current		>
Veteran Status				

Step	Action
2.	For this example, you have navigated to the Personal Details page from the Employee Self Service Home Page . Address information is displayed in the grid on the Information panel.
	To edit address information for one of your addresses, click on the row for the address you want to edit in the Information panel. In this example, you want to edit your home address.



< My Homepage	Personal Details		Â	Q	۲		٢
David Smith ⊙							
Addresses Contact Details Contact Details Contact Details Contacts Contacts Contacts Contacts	Addresses Home Address 1000 Pine Drive Concord, CA 94518 Cu Contra Costa	urrent				>	
Additional Information	Mailing Address 1000 Pine Drive Concord, CA 94518	urrent				>	
Veteran Status							

Step	Action
3.	Click the row for your Home Address.
	Current

< My Homepage		Personal Details		Q	۲	Ξ	۲
David Smith G	Cancel	Address	Save	^			
Addresses	Change As Of	02/21/2017					
Contact Details	Address Type	Home					
Name	Country	United States Q					
🕵 Ethnic Groups	Address 1	1000 Pine Drive				>	
Emergency Contacts	Address 2						
Additional Information	Address 3						
🗞 Disability	City	Concord				>	
4 Veteran Status	State	California Q					
	Postal	94518					
	County	Contra Costa					
				~			



Step	Action
4.	The Address page displays. You can use this page to edit your home address information.
	Editing address information is covered in other portions of Contra Costa County PeopleSoft Training: Employee Self Service: Maintaining Home and Mailing Addresses.
5.	For this example we have navigated to the Contact Details portion of the Personal Details page by clicking on Contact Details in the Action panel.
	Contract InformationPhone and Emaildisplays in the grids on this page. To edit this information, click on the row in the grid for the information you want to edit.
	You can also use the Plus button to add a new row to the grid.
6.	Click on the row for the Home phone. Home

< My Homepage		Personal Details		Â	Q	۲		۲
David Smith ⊙								
Addresses	Contact Deta	ils						
🔮 Contact Details 💶 Name	Cancel	Phone Number	Save]				
🕵 Ethnic Groups	Туре	Home	- 1	Туре		Preferre	ed	
C Emergency Contacts	Preferred		- 1	Business		~	>	
Additional Information Delete button Disability	Number Extension	510/555-1212		Home			>	
🕹 Veteran Status								
		Delete		Туре		Preferre	ed	
			-	Business		~		



Step	Action
7.	The Phone Number page displays with information about your home phone number. You can edit this information. The Delete button enables you to delete phone information.
	If you had used the Plus button, the Phone Number page would display without any phone information.
	See the eProfile portion of Employee Self Service training for more information about adding, editing, or deleting contact information.

< My Homepage	Personal Deta	ils		Q Y	∎ ⊘
David Smith () Addresses Contact Details Name Ethnic Groups Emergency Contacts Additional Information Disability Veteran Status	Ethnic Groups Ethnic Groups Columnary Self-Identification White Voluntary Self-Identification The employer is subject to certain gov administration of civil rights laws and r invites employees to voluntarily self-d voluntary and rebusal to provide ti will obtained will be kept confidential and tobtained will be kept confidential and reported to the federal governmer any specific individual. For the purposes of EEOC reporting, 1 White (not of Hispanic origin): All North Africa, or the Middle East. Black (not or Hispanic origin): All distance or origin, regardless of race Southeast Asia, the Indian Subcon China, india, Japan, Korea, the Phi American Indian or Alaskan Nath North America, and who maintain or	gulations. In order to com mitify their race or ethnicity tot subject you to any adve nay only be used in accord is, including those that requ t for civil rights enforcement he following race/ethnic ca persons having origins in a persons having origins in a Puerto Rican, Cuban, Centr ons having origins in any o nent, or the Pacific Islands poine Islands, and Samoa e: All persons having origins	and reporting requiply with these law i. Submission of the second second second second the second second second second the second second second second the second sec	vs, the employment his informatic visions of an n to be summ n to be summ d, data will n sed: l peoples of acial groups rican, or other bles of the F- les, for exan riginal peopl	oyer on is marized ot identify Europe, of Africa. er Spanish ar East, pple, es of

Step	Action
8.	You have used the Ethnic Group Link in the Action panel top display the Ethnic Group portion of the Personal Details page in the Information panel.
	Your current self-identification is displayed in the grid in the Information panel. To edit this information, click on the row you want to edit. This grid can have multiple rows.
	To add an additional self-identification, click the Plus button.
9.	Click the Add an Ethnic Group button.
	+



Step	Action
10.	The Ethnic Group page displays. Use this page to add/select information about the Ethnic Group Self-identification you are adding.
	See the eProfile portion of Employee Self Service training for more details about working with ethnic group self-identifications.
11.	
	End of Procedure.

Using Drop-down lists

Drop down lists in fluid work like drop down lists on Classic PeopleSoft pages. To use a drop down list, click in the arrow in the list field. The list will display. Then click the option you want to use. The value you select will display in the field. If you type the first letter of one of the values that is included in a drop down list, the system will display that value in the field. Generally, it is better to simply use the drop down list arrow to display the list and to select a value.

Here is an example of a fluid drop down list:

D	01010		
-	Cancel	Phone Number	Save
	6	*Type	
	Pr	eferred	
95		lumbe	
28	Fx	te on	
	0	op down list	
Kis	_		
na			

Here is the list with the choices displayed:



Phone Number	Save
Home Mobile Pager 1	
_ist Selections	

Click in one of the values in the list to display it in the field.

Procedure





Step	Action
1.	In this topic, you will review how to use drop down lists to select values.
	Drop down lists allow you to select from a list of valid values.
	To use a drop down list, click in the field and then select the value from the list that displays.
	If you know the first letter or letters of the value you want to use, you can type those in and the system will display a list of all valid values that start with the character you enter in the field. If only one value exists that starts with the characters you typed, the system will populate the field with that value.
	Some drop down lists contain a large number of values. In those cases you can use the scroll bar to help you locate the value you want. With large lists you can also enter the first letter of a value. The system will populate the field with the first value in the list that begins with the letter you entered. You can use the down arrow key on your key board to scroll down the list until you find the value you want to use.
2.	Here is an example of clicking in a drop down list to select a value.

< My Homepage	Personal Details	Â	०, ┡ ≡ ∅
David Smith 📀			
Addresses	Contact Details		
∽ ⊒ Name	Cancel Phone Number Save		
K Ethnic Groups	*Type	Туре	Preferred
Emergency Contacts	Preferred	Business	~ >
Additional Information	Number	Home	>
Disability	Extension	-	
Veteran Status			
		Туре	Preferred
		Business	~

Step	Action
3.	Click the Type list. *Type
	^ Type



< My Homepage		Personal Details	Â	Q	۲	≡	٢
David Smith 😔							
X Addresses	Contact Deta	ils					
- Name	Cancel	Phone Number Save					
thnic Groups	*Туре	Mobile	Туре		Preferr	ed	
Central Emergency Contacts	Preferred	Pager 1	Business		~	;	>
Additional Information	Number		Home			;	>
لغ Disability	Extension						
Leteran Status			_				
			Туре		Preferr	∋d	
			Business		~		

Step	Action
4.	Click the Pager 1 list item.
	Pager 1

< My Homepage		Personal Details	Â	Q	۲	Ξ	٢
David Smith 😔							
Addresses	Contact Deta	ils					
Service States S	Cancel	Phone Number Save					
thnic Groups	*Туре	Pager 1	Туре		Preferr	ed	
Emergency Contacts	Preferred		Business		~	;	>
Additional Information	Number		Home			;	>
🛃 Disability	Extension						
🔏 Veteran Status							
			Туре		Preferr	ed	
			Business		~		



< My Homepage	Personal Details	Â	9	′ ≡	۲
David Smith 😔	-				
Addresses	Contact Details				
Contact Details	Dhama				
- Name	Cancel Phone Number Save				
thnic Groups	*Type Pager 1	Туре	Pre	ferred	
Contacts	Preferred	Business		~	>
Additional Information	Number	Home			>
🛃 Disability	Extension	1101110			
🔏 Veteran Status					
		Туре	Pre	ferred	
		Business		~	

Step	Action			
6.	otice the value you select is now displayed in the Type field.			
7.	Here's an example of changing the value that has been previously selected.			
8.	Click the Type list.			
	Type Home			



		Personal Details	Â	Q	۲	≡	۲
David Smith 📀							
Addresses	Contact Deta	ils					
Contact Details	Cancel	Phone Number Save					
Ethnic Groups	Туре	Home	Туре		Preferr	ed	
Emergency Contacts	Preferred	Mobile Pager 1	Business		~		>
Additional Information	Number	510/555-1212	Home				>
🧞 Disability 🗻 Veteran Status	Extension						
		Delete	Туре		Preferr	ed	
			Business		~		

Step	Action
9.	Click the Mobile list item.
	Mobile

		Personal Details	Â	Q	۲ -	
David Smith ⊙						
X Addresses	Contact Deta	ils				
Contact Details	Dhama					
S Name	Cancel	Phone Number Save				
Kathnic Groups	Туре	Mobile 🖌	Туре	F	Preferre	d
Emergency Contacts	Preferred		Business		~	>
Additional Information	Number	510/555-1212	Home			>
الله Disability	Extension					
Veteran Status						
		Delete				
			Туре	F	Preferre	d
			Business		~	



Step	Action	
10.	Click in the	e Number field.
	Number	510/555-1212

	Personal Details	Â	Q '	۲ -		
David Smith 😔	-					
X Addresses	Contact Details					
Contact Details	Disease					
- Name	Cancel Phone Number Save					
Katha Comps	Type Mobile 💌	Туре	P	referred	ł	
C Emergency Contacts	Preferred	Business		~	>	
Additional Information	Number 510/555-1212 ×	Home			>	
🧞 Disability	Extension					
🔏 Veteran Status						
	Delete	Туре	P	referred	ł	
		Business		~		

Step	ction			
11.	lotice, the new value you selected now displays in the Type field.			
12.	lere's an example of a drop down list that uses a scroll bar.			
13.	lick the Relationship list.			
	Relationship			



		Personal Details	Â	Q	۲	Ξ	Ø
David Sm	nith 🕑				-		
	Cancel	Emergency Contact		Save			
Addresses Contact Details Contact Details Ethnic Groups Ethnic Groups Emergency Cont Additional Inform Disability Veteran Status	*Contact Name *Relationship Preferred Address	Adult Child Child Daughter - Court Ordered Domestic Partner Adult Domestic Partner Adult Domestic Partner Child Employee Estate ExDomestic Partner Exspouse Foster Child Friend Grand Parent Grand Crandchild Great Grandchild Great Grandchild IRS Section152 Domestic Partnr In-Law Neighbor Nephew Niece Other - Court Ordered Other Relative Parent Parent In-law Recognized Child Roommate		Save			
		Sibling					

Step	Action
14.	Click the scrollbar.
15.	Click the Stepson - Court Ordered list item.
	Stepson - Court Ordered



	Personal Details	Q	۲	Ξ	۲
David Smith 🕑					
Cancel	Emergency Contact	Save			
Addresses Contact Details Cont	ress	_			

Step	Action
16.	Notice the value you selected now appears in the Relationship field.
17.	Here are two examples of using your keyboard to select a value in a drop down field.

		Personal Details		Â	Q	۲ ا	
David Smith ⊙							
Addresses	Contact Deta	ils					
Mame	Cancel	Phone Number	Save				
Kan Steel St	*Type			Туре	I	Preferre	d
Emergency Contacts	Preferred			Business		~	>
Additional Information	Number			Home			>
🛃 Disability	Extension						<i></i>
🔏 Veteran Status							
				Туре	F	Preferred	ł
				Business		~	



Step	Action
18.	Enter the desired information into the Type field. Enter "m".
	*Туре
19.	Click in the Number field.
	Number

Addresses C Contact Details Name Ethnic Groups C Emergency Contacts	Contact Details	Туре	Preferred
Contact Details	Phone Number S		Performed
Name Cance Ethnic Groups Emergency Contacts	*Type Mobile 💟		Desferred
Emergency Contacts		Туре	Durformed
	Preferred		Preterred
Additional Information		Business	~ >
	Number	Home	>
5 Disability	Extension		
🔏 Veteran Status			
		Туре	Preferred
		Business	~

Step	Action
20.	Notice the Type field now displays Mobile.
21.	Here is another example of using your keyboard to select a value from a drop down list.



	Personal Details	Â	Q	۲	Ξ	۲
David Smith 🕑				0		
Cancel	Emergency Contact		Save			
Addresses	*Contact Name John Button × *Relationship ✓ Preferred 🗹					
C Emergency Cont Address						
Additional Inform No data exis	ls.					
Lisability Add Add	ress					
4 Veteran Status						
Phone Numb	ers					
No data exis	is. se Number					

Step	Action
22.	Notice the focus is currently in the Contact Name field,
	Press [Tab] to move the focus to the Relationship field.

		Personal Details	Â	Q	۲	≡	۲
David Sm	ith 📀			_			
	Cancel	Emergency Contact		Save			
Addresses Contact Details Name Ethnic Groups Emergency Cont Additional Inform Disability Veteran Status	Cancel Contact Name "Relationship Preferred Address No data exists. Add Address Phone Numbers No data exists. Add Phone Number	John Button		Save			-
					ļ		



Step	Action				
23.	Enter the desired	nter the desired information into the Relationship field. Enter "d".			
	*Relationship				

			Personal Details	Â	Q	۲	Ξ	۲
David Sm	ith 🕑					2		
	Cancel		Emergency Contact		Save			
Addresses Contact Details Contact Details Ethnic Groups Ethnic Groups Emergency Cont Additional Inform Disability Veteran Status	-c - Address	ontact Name Relationship Preferred	John Button Daughter - Court Ordered					
					_			

Step	Action
24.	Use the down arrow key on your keyboard to move down the list until you find the value you want to use. In this example, you want to select Grandchild.
	Press [Down Arrow].



			Personal Details	Â	Q	۲	≡	٢
David Sn	nith 🕑					0		
	Cancel		Emergency Contact		Save			
Addresses Contact Details Contact Details Name Ethnic Groups Contact Details C	Address No data exists. Add Addres Phone Number No data exists.	s	John Button		Save			
	Add Phone	Number						

Step	Action
25.	Notice the value in the Relationship field has changed.
	Press [Down Arrow].

			Personal Details		Q	۲	۲
David Sm	ith 🕑					8	
	Cancel		Emergency Contact		Save		
Addresses Contact Details Name Ethnic Groups Emergency Cont Additional Inform Disability Veteran Status		55 'S	John Button Domestic Partner Child		Save		-



Step	Action
26.	Notice the value in the Relationship field has changed.
	Press [Down Arrow].

Step	Action
27.	Notice the value in the Relationship field has changed.
	Press [Down Arrow].



Personal Details 🛛 😭 🔍 🏲	≡	ø
David Smith 😔		
Cancel Emergency Contact Save		
Addresses Contact Details Name Ethnic Groups Cemergency Con Address No data exists. Add Address Veteran Status Phone Numbers No data exists. Add Phone Number		

Step	Action
28.	Notice the value in the Relationship field has changed.
	Press [Down Arrow].

			Personal Details		Q	۲	۲
David Sm	ith 😔					8	
	Cancel		Emergency Contact		Save		
Addresses Contact Details Name Ethnic Groups Emergency Cont Additional Inform Disability Veteran Status		55 FS	John Button		Save		



Step	Action
29.	Notice the value in the Relationship field has changed.
	Press [Down Arrow].

		Personal Details	Â	Q	۲	Ξ	۲
David Sn	nith 🕑				0		
	Cancel	Emergency Contact		Save			
Addresses Contact Details Name Ethnic Groups Emergency Cont Additional Inform Disability Veteran Status	*Contact Name *Relationship Preferred Address	John Button		Save			
			-	_			

Step	Action
30.	Notice the value in the Relationship field has changed.
	Press [Down Arrow].



			Personal Details		Q	۲	٢
David Sn	nith 🕑					5	
	Cancel		Emergency Contact		Save		
Addresses Contact Details Contact Details Name Ethnic Groups Emergency Coni Additional Inform Additional Inform Disability Usability Useran Status	Address	Contact Name *Relationship Preferred	John Button				
	Phone Numbers No data exists. Add Phone N						

Step	Action
31.	Notice the value in the Relationship field has changed.
	Press [Down Arrow].

David Smith Cancel Emergency Contact Addresses Contact Details *Contact Name Contact Details *Relationship *Relationship <td< th=""></td<>
Addresses Contact Name John Button *Relationship *
Contact Details Contact Name Name Preferred Ethnic Groups Emergency Con Address Additonal Inform No data exists. Disability Add Address Phone Numbers
Add Phone Number



Step	Action
32.	Notice the value in the Relationship field has changed.
	Press [Down Arrow].

David Broth	
David Smith 📀	
Cancel Emergency Contact Save	
Cancel Emergency Contact Save Addresses "Contact Name John Button "Relationship Grand Parent Contact Details "Relationship Grand Parent " Ethnic Groups Address No data exists. Additional Inform Add Address Veteran Status Phone Numbers No data exists. Add Phone Number	

Step	Action
33.	Notice the value in the Relationship field has changed.
	Press [Down Arrow].



			Personal Details	Â		۲	≡	۲
David Sm	nith 🕑							
	Cancel		Emergency Contact		Save			
Addresses Contact Details Name Ethnic Groups Emergency Cont Additional Inform Disability Veteran Status	Address	s	John Button		Save			

Step	Action
34.	Notice the value in the Relationship field is now Grandchild.
	Press [Enter] to select this value.

			Personal Details	Q	۲	
David Sm	ith 🕑			_	2	
	Cancel		Emergency Contact	Save		
Addresses Contact Details Name Ethnic Groups Emergency Cont Additional Inform Lisability Veteran Status		s	John Button Grandchild	Save		



Step	Action
35.	Notice the Relationship field now displays Grandchild, the value you just selected.
36.	
	End of Procedure.

Using Text Entry Fields

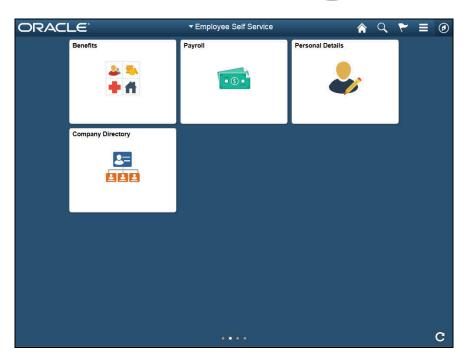
Text entry fields work the same in Fluid pages as they do in Classic PeopleSoft pages. Left click in the text entry field and then enter the text you want to use in that field.

Here's an example of a Fluid text entry field.

Cancel	Phone Number	Save
:	*Туре	
Pre	ferred	
N	umber	
Exte	nsion	
	Text Entry field	

Procedure





Step	Action
1.	This example demonstrates how to text entry fields.
	For this example, you will enter address information for a new emergency contact.
	For more details about adding, editing, and deleting emergency contact information see the eProfile portion of Employee Self Service Training.

< My Homepage			Personal Details		Â	۲	∎ @	
David Sm	iith 🕑					8		
	Cancel		Emergency Contact		Save			
Addresses	Cancel		Address		Done			
Contact Details		Same as mine						
- Name		Country	United States	Q				
thnic Groups		Address 1						
C Emergency Cont	F	Address 2						
Additional Inform		Address 3						
الله Disability		City						
省 Veteran Status		State		Q				
	F	Postal						
		County						



Step	Action
2.	To use a text entry field. Click in the field you want to edit and use your key board to enter text.
	To move to the next field, click in the field you want to edit. You can also use the Tab key to move to the next field.

< My Homepage			Personal Detail	S	Â	۲	۲
David Sm	ith 🕑					2	
	Cancel		Emergency Conta	act	Save		
Addresses	Canc	el	Address		Done		
Contact Details		Same as mine				-	
s= Name		Country	United States	Q			
🞎 Ethnic Groups		Address 1					
Emergency Cont	F	Address 2					
Additional Inform		Address 3					
🛓 Disability		City			- 11		
省 Veteran Status		State		Q	- 11		
	F	Postal					
		County					

Action			
Click in the Address 1	field.		
Cancel	Address	Done	
Same as mine			
Country	United States	Q	
Address 1			
Address 2			
		field. Enter "180	3 Devon Court".
Cancel	Address	Done	
Same as mine			
Country	United States	Q	
Address 1			
Address 2			
	Click in the Address 1	Click in the Address 1 field. Cancel Address Same as mine Country United States Address 1 Address 2 Enter the desired information into the Address 1 Cancel Address Same as mine Country United States Address 1	Click in the Address 1 field.



Step	Action
5.	Click in the City field.
	Same as mine
	Country United States Q
	Address 1 1803 Devon Court ×
	Address 2
	Address 3
	City
	State Q
	Bastal
6.	Enter the desired information into the City field. Enter " Concord ".
	Address 1 1803 Devon Court
	Address 1 1005 Devoir Court
	Address 2
	Address 3
	City
	City
	State Q
7.	Click in the State field.
	Country United States Q
	Address 1 1803 Devon Court
	Address 2
	Address 3
	City Concord
	State Q
	Postal

< My Homepage			Personal Details		Â	۲	۲
David Sm						2	
	Cancel		Emergency Contact		Save		
Addresses	Cancel		Address		Done		
Contact Details		Same as mine				-	
Name		Country	United States	Q			
Ethnic Groups		Address 1	1803 Devon Court	Look Up but	tton		
Emergency Cont	A	Address 2					
Additional Inform		Address 3					
💃 Disability		City	Concord		- 11		
Veteran Status		State		Q	- 11		
	F	Postal					
		County			- 11		
					- 11		
					- 11		



Step	Action						
8.	Notice, the State Field has a look up button. This field uses a prompt table that contained a list of all valid values for the field.						
	You can type directly in this field (or use the lookup button to select a value).						
	The system will in some cases anticipate the value you intend based on the characters you enter and display it box below the field.						
	In the example here, you want to enter California in the State field.						
9.	Enter the desired information into the State field. Enter "CA".						
10.	Note the system displays a selection below the State field based on the value you typed in the State field. Click the CA California object to select it.						

David Smith () Cancel Emergency Contact Save Addresses Contact Details Same as mine Country United States Q Address 1 Biology Ethnic Groups Address 2	
Addresses Cancel Address Done Contact Details Same as mine Name Address Q Address 1 1803 Devon Court	
Contact Details Same as mine Name Country United States Address 1 1803 Devon Court	
Country United States Name Address 1 1803 Devon Court	
Address 1 1803 Devon Court	_
Ethnic Groups	
C Emergency Cont Address 2	
Additional Inform	
City Concord	
La Veteran Status State California × Q	
Postal	
County	



Step	Action
11.	Note the State field now displays California.
12.	Click in the Postal field. Address 2 Address 3 City Concord State California × Q Postal County
13.	Enter the desired information into the Postal field. Enter "94520".
14.	Click in the County field.
15.	Enter the desired information into the County field. Enter " Contra Costa ". City Concord State California Postal 94520 County



	< My Homepage		Personal Details		<u> </u>	\sim	
Ī	David Smith G	Cancel	Address	Save			
	Addresses	-					
3	Contact Details	Address Type	Home				
•	Name	Country	United States Q				
	Ethnic Groups	Address 1	1000 Pine Drive				>
Z	Emergency Contacts	Address 2					
2	Additional Information	Address 3					
i	Disability	City	Concord				>
4	Veteran Status	State	California Q				
		Postal	94518				
		County	Contra Costa				
				~			

Step	Action					
16.	Next, you will edit an existing value in a text entry field.					
	We have navigated to the Address page for your home address and will change the value that appears in the Address 1 field.					
	To edit an existing value, either					
	Select the value by using your mouse to highlight the text you want to edit and either press the Delete key on your key board or type directly over the highlighted text.					
	or					
	Select the entire text in a field by tabbing into the field from the previous field or using shift/tab to tab back to the field from fields below the field you want to edit.					
17.	Click in the Address 1 field.					
	Change As Of 09/08/2018					



Step	Action
18.	Enter the desired information into the Address 1 field. Enter "2641 Prospect Street".
	Change As Of 09/08/2016
	Country United States Q
	Address 1 1000 Pine Drive ×
	Address 2

< My Homepage		Personal Details		
David Smith G	Cancel	Address	Save ^	Ŭ
Addresses	Change As Of	09/08/2016		
Contact Details	Address Type	Home		
Name	Country	United States Q		
thnic Groups	Address 1	2641 Prospect Street	×	>
Emergency Contacts	Address 2			
Additional Information	Address 3			
	City	Concord		>
	State	California Q		
	Postal	94518		
	County	Contra Costa		
			~	

Step	Action
19.	Notice the Address 1 field now contains the new address information.
20.	
	End of Procedure.

Using Add Buttons

Some Fluid pages enable you to add new values, e.g., a new phone number or email address, or a new Ethnic Self Identification. These pages contain one or more Add buttons. Clicking one of these buttons opens a new fluid page that appears as a window on top of the base fluid page. You can use this new page to enter information about the item you want to add.

Here's an example of an Add button:





Here's an example of a page that displays after you have clicked an Add button:

Cancel	Phone Number		Save
	*Type Preferred Number Extension		

Procedure

Step	Action
1.	This topic demonstrates how to use Add buttons to add new and/or additional
	information to grids on fluid pages.



Step	Action
2.	Here is an example of an Add button that displays when the grid in the information panel of a fluid page is empty.
	In this example, you will add a voluntary deduction.
	Note: Adding voluntary deductions is covered fully in the ePay portion of Employee of Self Service training.

< My Homepage	Voluntary Deductions List	ନ ୍	۲ =
David Smith			
Pay Checks Direct Deposit	Voluntary Deductions Review, add or update your voluntary deductions information.		
W-4 Tax Information DE4 State Tax Information	Deduction Type Start Date Stop Date Status Deduction ◇ </td <td>Goal Amount ≎</td> <td>1 row Goal Balance ♢</td>	Goal Amount ≎	1 row Goal Balance ♢
Voluntary Deductions			
	Add Deduction		

Step	Action
3.	 You have navigated to the Voluntary Deduction list page: Employee Self Service > Payroll > Payroll Self Service > Voluntary Deductions. You currently have no voluntary deductions. Use the Add Deduction button to begin the process of adding a voluntary deduction. Click the Add Deduction button.
	Click the Add Deduction button.
	Deduction Type Start Date Stop Date Status Deduction Goal Amount Goal Balance
	Add Deduction



Step	Action				
4.	Click the Look up *Type of Deduction button.				
	Voluntary Deductions				
	*Type of Deduction				
5.	Click the Charity United Way object.				
6.	Click in the Enter Amount field. Use this field to indicate the amount you want deducted from your pay each month for this deduction.				
	Voluntary Deductions				
	*Type of Deduction Charity United Way × Q				
	Flat Amount Amount				
	*Enter Amount				
7.	Enter the desired information into the Enter Amount field. Enter "25".				
	*Type of Deduction Charity United Way Q				
	Flat Amount Amount				
	*Enter Amount				



Step	Action
8.	Click in the Take deduction until I reach this Goal Amount field.
	Use this field to indicate the total amount you want to contribute as part of this deduction. Voluntary Deductions
	*Type of Deduction Charity United Way Q Flat Amount Amount
	*Enter Amount 25 ×
	Take deduction until I reach this Goal Amount
9.	Enter the desired information into the Take deduction until I reach this Goal Amount field. Enter " 500 ".
	Voluntary Deductions Type of Deduction Charity United Way Q
	Flat Amount Amount
	*Enter Amount 25
	Take deduction until I reach this Goal Amount
	*Enter Deduction Start Date
10.	Click in the Enter Deduction Start Date field.
	Use this field to indicate the date on which you want the deduction to start.
	Voluntary Deductions
	*Type of Deduction Charity United Way Q Flat Amount Amount
	*Enter Amount 25
	Take deduction until I reach this Goal Amount
	*Enter Deduction Start Date
11.	Enter the desired information into the Enter Deduction Start Date field. Enter "2/15/2017".
	Flat Amount Amount
	*Enter Amount 25
	Take deduction until I reach this Goal Amount 500
	*Enter Deduction Start Date



Step	Action
12.	The deduction must be processed by the payroll staff.
	Click the Submit button.
	Enter Deduction Stop Date
	(example: 12/31/2000) Current Balance 0.00
	* Required Field Submit
13.	Note: because the deduction must be processed by the payroll staff or because the current payroll may already be in process, the deduction may not show up in your net paycheck. Click the OK button.
14.	Click the OK button.
	 ission was successful. Please contact your departmental payroll personnel to complete 'CCYY' Contracampaign form to ensure deductions are submitted to your charity of choice. OK Cancel



< My Homepage	Voluntary De	eductions	List		Â	9 3	
David Smith							
Pay Checks	Voluntary Deductions Review, add or update your voluntary deductions information.					1 rows	
W-4 Tax Information	Deduction Type Start E	oate Stop Date ⊘	Status ≎	Deduction ⇔	Goal Amount ♢	Goal Balance ≎	Trows
Voluntary Deductions	Charity United Way 02/15/2 Add Deduction	2017	In Future	\$25.00	500.00	0.00	Edit

Step	Action
15.	Note the Voluntary Deductions grid now displays the deduction information you just entered.
	You can use the Add Deduction button to add additional deductions of the same or other types.
16.	Here is an example of an Add button when the grid on the fluid page contains data. In this case, you will add an additional value.
	In this example, you will add additional phone number.
	Adding phone information is covered in the eProfile portion of Employee Self Service training.



Step	Action				
17.	You have navigated to the Contact Details portion of the Personal Details page: Employee Self Service > Personal Details tile > Contact Information.				
	Currently you have two phone numbers listed. You will use the Plus (Add Phone) button to add an additional phone number.				
	Click the Add Phone button.				
	Contact Details Phone				
	+				
	Number Exter	sion Type			
		Business			
	925/558-5524	Home			
18.	Click the Type list.				
	Cancel Phone Number Save				
	*Type				
	Number				
	Extension				

< My Homepage		Personal Details		} ₹ ≡	۲
David Smith 😔					
Addresses	Contact Deta	ils			
Same	Cancel	Phone Number Save			
thnic Groups	*Type	Mobile	Туре	Preferred	
Contacts	Preferred	Pager 1	Business	~	>
Additional Information	Number		Home		>
🛃 Disability	Extension				
🐴 Veteran Status					_
			Туре	Preferred	
			Business	~	



Step	Action
19.	Click the Mobile list item.
	*Type Mobile Preferred Pager 1

< My Homepage	Pers	onal Details		Â	7	∎ Ø
David Smith 😔						
X Addresses	Contact Details					
Contact Details	Dhana					
S Name	Cancel Pho	one Number	Save			
🕵 Ethnic Groups	*Type Mo	bile 🔽	Тур	e	Preferre	ed
Contacts	Preferred		Bus	iness	~	>
Additional Information	Number		Hor	ne		>
🛃 Disability	Extension					
🐴 Veteran Status						
			Тур	e	Preferre	ed.
			Bus	iness	~	

Step	Action
20.	Click in the Number field.
	*Type Mobile
	Preferred
	Number
	Extension



Step	Action
21.	Enter the desired information into the Number field. Enter "925/556-2112".
	*Type Mobile 🔽
	Preferred
	Number
	Extension
22.	Click the Save button.
	Cancel Phone Number Save
	*Type Mobile 🔽
	Preferred
	Number 925/556-2112 ×
	Extension

< My Homepage	Personal I	Details	1		
	You have successfully adde	d your "Mobile" phone.			
Addresses	Contact Details				
Contact Details	Phone				
Name	+				
Kanal Ethnic Groups	Number	Extension	Туре	Prefer	red
Emergency Contacts			Business	~	>
Additional Information	925/556-2112		Mobile		>
	925/558-5524		Home		>
	Email				
	+				
	Email Address		Туре	Prefer	red
			Business	~	

Step	Action
23.	Notice the system issues a message across the top of the page indicating that you have successfully added your mobile phone. Also notice that the Phone grid now lists three phone types including the phone you
	just added.



Step	Action
24.	
	End of Procedure.

Using Check Boxes and Radio Buttons

Some fluid pages contain fields that require you to select a check box to select a value or an option. Check boxes in fluid work the same way they do in Classic PeopleSoft pages. Click an unselected Check box to select it. If a check box is selected, click it to unselect it.

Here's an example of a field that uses a check box:

Cancel	Phone Number	Save
	*Type	
	Preferred	
	\checkmark	
	Number	
	Exter on	
	Check Box	

This check box is not selected. Click the Check box to select it.

Here's an example of a field with a check box that is selected:



Cancel		Phone Number	Save
	*Type Preferred		
	Number		
	Extension	Check Box Sele	cted
2			
12			

Click the Check

ORAC	LE	▼ Employee Self Service	â	Q	۲	=	۲
	Benefits	Payroll	Personal Details				
	Company Directory						
						ķ	С

Step	Action
1.	This topic covers the use of check boxes and Radio buttons to select values and
	options.



2	Step	Action
	2.	This example demonstrates how to use a check box to select a value.
		You will use a check box to indicate that an emergency contact is your preferred emergency contact.

< My Homepage		Personal Details	Â	۲	
David Smi	ith 🕑			-	
	Cancel	Emergency Contact	Save		
Addresses Contact Details Name Ethnic Groups Emergency Cont Additional Inform Disability Veteran Status	*Contact Na *Relations Prefer Address 2641 Prospect Street Concord, CA 94518 Contra Costa Phone Numbers	ip Sibling	>	eferred	>
	+				
	Phone	Extension Type			
	925/558-5523	Same as mine	>		
		Delete			

Step	Action
3.	You have navigated to the Emergency Contact page for emergency contact James Smyth and will mark this contact as your preferred contact: Employee Self Service > Personal Details Tile > Emergency Contact .
	Click the Preferred option.
	*Contact Name James Smyth ×
	*Relationship Sibling
	Preferred



Step	Action		
4.	Click the Save button.		
	Cancel	Emergency Contact	Save
	*Contact Name	James Smyth	^
	*Relationship	Sibling	
	Preferred		

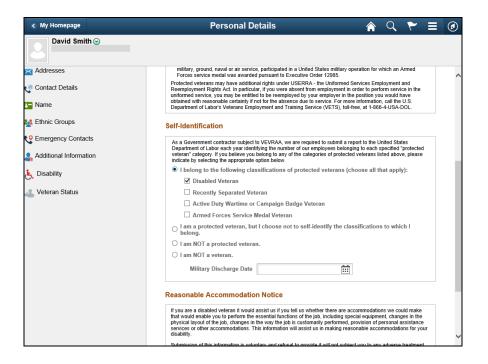
< My Homepage	Persona	l Details	A Y E	Ø
	Emergency Contact "James Sm	yth" was successfully updated.		×
X Addresses	Emergency Contacts			
Contact Details	+			
Name	Contact Name	Relationship	Preferred	
Kan Ethnic Groups	James Smyth	Sibling	~	>
Contacts			~	,
Additional Information	Susan Jones	Friend		>

Step	Action
5.	Notice the system displays a confirmation message indicating that you successfully updated James Smyth.Also notice that James Symth is your preferred contact.
6.	This portion of the topic demonstrates how to deselect a check box and how to use a Radio button.Radio buttons present mutually exclusive options. You cannot select multiple Radio buttons in a group.



< My Homepage	Personal Details 🛛 🏫 🔍 🏲 🚍	(
David Smith 😔		
Addresses	military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service media was awarded pursuant to Executive Order 1295. Protected veterans may have additional rights under USERRA - the Uniformed Services Employment and Reemployment Rights Act. In particular, if you were absent from employment in order to perform service in the uniformed service, you may be entitled to be reemployed by your employer in the position you would have	
Name	obtained with reasonable certainty if not for the absence due to service. For more information, call the U.S. Department of Labor's Veterans Employment and Training Service (VETS), toll-free, at 1-866-4-USA-DOL.	
Ethnic Groups	Self-Identification	
Emergency Contacts	As a Government contractor subject to VEVRAA, we are required to submit a report to the United States Department of Labor each year identifying the number of our employees belonging to each specified "protected veteran" category. If you believe you belong to any of the categories of protected veterans listed above, please	
L Disability	indicate by selecting the appropriate option below. I belong to the following classifications of protected veterans (choose all that apply): I bisabled Veteran	
Veteran Status	Control Control Veteran Control Veteran Active Duty Wartime or Campaign Badge Veteran	
	Armed Forces Service Medal Veteran	
	 I am a protected veteran, but I choose not to self-identify the classifications to which I belong. 	
	O I am NOT a protected veteran.	
	I am NOT a veteran. Military Discharge Date	
	Reasonable Accommodation Notice	
	If you are a disabled veteran it would assist us if you tell us whether there are accommodations we could make that would enable you to perform the essential functions of the job, including special equipment, changes in the physical alyout of the job, changes in the way the job is customarily performed, provision of personal assistance services or other accommodations. This information will assist us in making reasonable accommodations for your disability.	

Step	Action
7.	For this example you navigated the Veteran Status page and scrolled to the Self-Identification section of that page: Employee Self Service > Personal Details Tile > Veteran Status.
	This section contains four radio buttons. The first radio button has four check boxes under it.





Step	Action
8.	Notice that the Disabled Veteran check box is selected. For this example, you will deselect it. Click the Disabled Veteran check box.
	As a Government contractor subject to VEVRAA, we are required to submit a report to the United States Department of Labor each year identifying the number of our employees belonging to each specified "protected veteran" category. If you believe you belong to any of the categories of protected veterans listed above, please indicate by selecting the appropriate option below.
	 I belong to the following classifications of protected veterans (choose all that apply): Disabled Veteran Recently Separated Veteran

< My Homepage	Personal Details 🛛 😭 🔍 🏲 🚍	۲
David Smith 📀		
Addresses	military, ground, naval or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985. Protocted veterans may have additional rights under USERA. In the Unitomed Services Employment and	^
e [®] Contact Details	Reemployment Rights Act. In particular, if you were absent from employment in order to perform service in the uniformed service, you may be entitled to be reemployed by your employer in the position you would have obtained with reasonable certainty if not for the absence due to service. For more information, call the U.S. Department of Labor's Veterans Employment and Training Service (VETS), how there, at 1466-440-405A.OL.	
🋂 Ethnic Groups	Self-Identification	
C Emergency Contacts	As a Government contractor subject to VEVRAA, we are required to submit a report to the United States Department of Labor each year identifying the number of our employees belonging to each specified "protected veterar" category. If you believe you belong to any of the categories of protected veterans listed above, please	
L Disability	indicate by selecting the appropriate option below. I belong to the following classifications of protected veterans (choose all that apply):	
Veteran Status	Disabled Veteran Recently Separated Veteran Recently Separated Veteran	
	Active Duty Wartime or Campaign Badge Veteran Armed Forces Service Medal Veteran	
	I am a protected veteran, but I choose not to self-identify the classifications to which I belong. I am NOT a protected veteran.	
	O I am NOT a veteran.	
	Military Discharge Date	
	Reasonable Accommodation Notice If you are a disabled veteran it would assist us if you tell us whether there are accommodations we could make	
	If you are a usable veteral it would assist us if you let us writinet inter are accumpted by the use of the the that would enable you to perform the essential functions of the job, including special equipment, changes in the physical layout of the job, changes in the way the job is customarily performed, provision of personal assistance services or other accommodations. This information will assist us in making reasonable accommodations for your disability.	~
	Submission of this information is voluntary and refusal to provide it will not subject you to any advarse treatment	



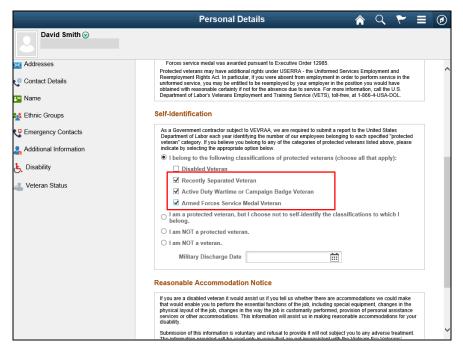
Step	Action
9.	Notice the Disabled Veteran check Box is no longer selected.
	You will now select the Active Duty Wartime or Campaign Badge Veteran check box. Click the Active Duty Wartime or Campaign Badge Veteran check box.
	I belong to the following classifications of protect
	Disabled Veteran
	Recently Separated Veteran
	Active Duty Wartime or Campaign Badge Vet
	Armed Forces Service Medal Veteran
	○ I am a protected veteran, but I choose not to self-i belong.

< My Homepage	Personal Details 🛛 🔺 🤍 🏲	∎ ⊘
David Smith ⊙		
✓ Addresses	military, ground, navai or air service, participated in a United States military operation for which an Armed Forces service medal was awarded pursuant to Executive Order 12985. Protected veletarus may have additional rights under USERRA - the Uniformed Services Employment and	^
Name	Reemployment Rights Act. In particular, if you were absent from employment in order to perform service in the uniformed service, you may be entitled to be reemployed by your employer in the position you would have obtained with reasonable certainty if not for the absence due to service. For more information, call the U.S. Department of Labor's Veterans Employment and Training Service (VFT), Iol-Hrea, 11-864–USA-DOL.	
Kathnic Groups	Self-Identification	
Emergency Contacts	As a Government contractor subject to VEVRAA, we are required to submit a report to the United States Department of Labor each year identifying the number of our employees belonging to each specified protocted veteran' category. If you believe our belond to any of the categories of protected veterans listed above, please	
S Additional Information	indicate by selecting the appropriate option below. I belong to the following classifications of protected veterans (choose all that apply): Disabiled Veteran	. 1
🛃 Veteran Status	 □ Disabled Veteran □ Recently Separated Veteran ☑ Active Duty Wartime or Campaign Badge Veteran □ Armed Forces Service Medal Veteran □ I am a protected veteran, but I choose not to self-identify the classifications to which I belong. □ I am NOT a protected veteran. □ I am NOT a veteran. Military Discharge Date 	
	Reasonable Accommodation Notice If you are a disabled veteran it would assist us if you tell us whether there are accommodations we could make that would enable you to perform the essential functions of the job, including special equipment, changes in the physical layout of the job, changes in the way the job is customarily performed, provision of personal assistance services or other accommodations. This information will assist us in making reasonable accommodations for you disability.	,

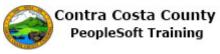
Step	Action
10.	Notice the Active Duty Wartime or Campaign Badge Veteran check box is now selected.
	Note it is possible to select multiple check boxes. For this example, you will select two other check boxes:
	Recently Separated Veteran Armed Forces Service Medal Veteran



Step	Action
11.	Click the Recently Separated Veteran check box. indicate by selecting the appropriate option below. I belong to the following classifications of protected vetera Disabled Veteran Recently Separated Veteran Active Duty Wartime or Campaign Badge Veteran Armed Forces Service Medal Veteran I am a protected veteran, but I choose not to self-identify ti belong.
12.	Click the Armed Forces Service Medal Veteran check box. I belong to the following classifications of protected veterans (choos Disabled Veteran Recently Separated Veteran Active Duty Wartime or Campaign Badge Veteran Armed Forces Service Medal Veteran I am a protected veteran, but I choose not to self-identify the classific belong.

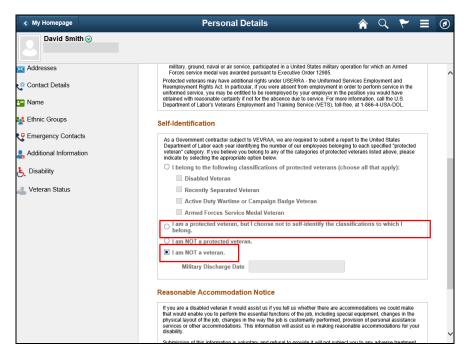


Step	Action
13.	Notice, three check boxes are now selected under the top level Radio button option.
	Next you will select a different Radio button.



~	
Step	Action
14.	Click the I am a protected veteran, but I choose not to self-identify the c option.
15.	Click the OK button. As a Government contractor subject to VEVRAA, we are required to submit a report to the United Warning Previous selections will be updated. You had previously identified as a Protected Veteran, your previous selections will be updated. OK OK
16.	Notice your previous selections have been deselected and that the I am a protected veteran Radio button is now selected. Next you will select another Radio button. Click the I am NOT a veteran. option. Recently Separated Veteran Active Duty Wartime or Campaign Badge Veteran Active Duty Wartime or Campaign Badge Veteran Armed Forces Service Medal Veteran Image and Portected veteran. Image and NOT a veteran. Image a





Step	Action
17.	Notice the previous selection has been deselected and the I am NOT a Veteran Radio button is now selected.
18.	End of Procedure.

Using Sliders

Some fluid pages use sliders to select options. Classic PeopleSoft pages do not use Sliders. Sliders work like check boxes; they are used to select a binary option—e.g., yes or no; selected or not selected. Click in the slider to change the selected option.

Cancel	Ethnic Group	Save
Р	rimary	
*Ethnic	Group	
	Slider	

Here's an example of a slider with the No option selected:

Here's an example of a slider with the Yes option selected.



Cancel	Ethnic Group	Save
	Primary Yes	
	*Ethnic Group	
	Slider	

Step	Action
1.	This topic demonstrates how to use sliders to select values/options.

< My Homepage	Personal Details		Q	۲	≡	۲
David Smith 🕑						
Addresses	Ethnic Groups					
Contracts Contr		orting re n these I nission o atment. vith the p informa n report s will be	laws, the of this in The info provision tion to b ted, data	e emplo formation prmation ns of ap ne sumn	yer on is plicable narized	
	 North Africa, or the Middle East. Black (not or Hispanic origin): All persons having origins in any of Hispanic: All persons of Mexican, Puerto Rican, Cuban, Central or S culture or origin, regardless of race. Asian or Pacific Islander: All persons having origins in any of the or Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This China, India, Japan, Korea, the Philippine Islands, and Samoa. American Indian or Alaskan Native: All persons having origins in a North America, and who maintain cultural identification through tribal recognition. 	South An riginal pe area incl	k racial nerican, eoples c ludes, fo	groups or othe of the Fa or exam	of Africa r Spanis rr East, ple, es of	



Step	Action
2.	Notice, the Ethnic Group page has a slider in the Primary field.
	You have navigated to the Ethnic Group page and are in the process of adding an ethnic group self identification: Employee Self Service > Personal Details tile > Ethnic Groups > Add an Ethnic Group button.
	Currently the option is set to "no". The ethnic group that you will add will not be your primary ethnic group.
	To change this selection, click the slider for the Primary field.

< My Homepage	Personal Details	♠ < ♥ ≡ Ø
David Smith 📀		
Contact Details	Ethnic Groups	
Ethnic Groups	Cancel Ethnic Group Save	
C Emergency Contacts	Primary No	
Additional Information	*Ethnic Group Q	orting requirements for the n these laws, the employer ission of this information is atment. The information
🐴 Veteran Status		with the provisions of applicable information to be summarized an reported, data will not identify
	North Africa, or the Middle East.	s will be used: the original peoples of Europe,
	2. Black (not or Hispanic origin): All persons having origins in any	of the Black racial groups of Africa.
	 Hispanic: All persons of Mexican, Puerto Rican, Cuban, Central o culture or origin, regardless of race. 	r South American, or other Spanish
	 Asian or Pacific Islander: All persons having origins in any of the Southeast Asia, the Indian Subcontinent, or the Pacific Islands. Th China, India, Japan, Korea, the Philippine Islands, and Samoa. 	
	 American Indian or Alaskan Native: All persons having origins in North America, and who maintain cultural identification through trib recognition. 	

Step	Action
3.	Click the Primary option.
	No



< My Homepage	Personal Details		Q	~		٢
David Smith ⊙						
Addresses Contact Details Name	Ethnic Groups					
🚺 Ethnic Groups	ancel Ethnic Group Save					
Contacts	Primary Yes					
Additional Information	*Ethnic Group Q	orting re	quireme	ents for	the	
Lisability		n these I nission o atment. vith the p informat	aws, the f this inf The info provision tion to b	e emplo formation for formation for formation formation for formation for formation format	yer on is plicable narized	
	North Africa, or the Middle East.	s will be the origin		oles of E	Europe,	
	2. Black (not or Hispanic origin): All persons having origins in any of	the Blac	k racial	groups	of Africa	a.
	 Hispanic: All persons of Mexican, Puerto Rican, Cuban, Central or culture or origin, regardless of race. 	South Arr	nerican,	or othe	r Spanis	sh
	 Asian or Pacific Islander: All persons having origins in any of the c Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This China, India, Japan, Korea, the Philippine Islands, and Samoa. 					
	 American Indian or Alaskan Native: All persons having origins in a North America, and who maintain cultural identification through triba recognition. 					

Step	Action
4.	Notice the slider for the Primary field now indicates "Yes". The ethnic group you are adding will be your primary ethnic group.
5.	To change your selection to "No", click the Primary option.



< My Homepage	Personal Details		Q	۲	Ξ	ø
David Smith 😔						
Addresses	Ethnic Groups					
	Cancel Ethnic Group Save					
C Emergency Contacts	Primary No					
Additional Information	*Ethnic Group Q	orting re				
E Disability		n these I nission o atment.	of this in	formatio	n is	
🔏 Veteran Status		vith the p information on report	provision tion to b	ns of ap le summ	plicable	
		s will be the origin		oles of E	Europe,	
	North Africa, or the Middle East.					
	2. Black (not or Hispanic origin): All persons having origins in any o	of the Blac	k racial	groups	of Afric	a.
	 Hispanic: All persons of Mexican, Puerto Rican, Cuban, Central o culture or origin, regardless of race. 	r South An	nerican,	or othe	r Spani	sh
	 Asian or Pacific Islander: All persons having origins in any of the Southeast Asia, the Indian Subcontinent, or the Pacific Islands. Th China, India, Japan, Korea, the Philippine Islands, and Samoa. 					
	 American Indian or Alaskan Native: All persons having origins in North America, and who maintain cultural identification through trib recognition. 					

Step	Action
6.	Notice the slider in the Primary field now indicates "No". The ethnic group you are adding will not be your primary ethnic group.
7.	End of Procedure.

Entering dates

You can enter a date directly into a date field using any of the following formats:

2/15/2017

02/15/2017

02-15-2017

2-15-2017

2/15/17

02/15/17

2-15-17

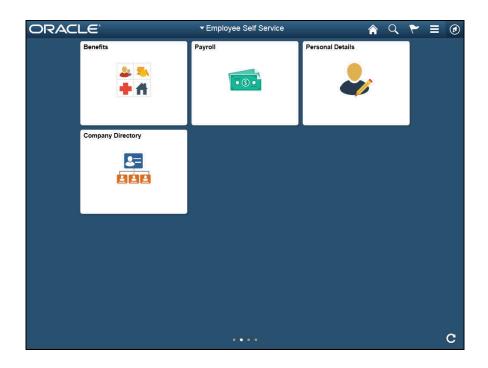
02-15-17

The system will automatically change the date to 02/15/2017.

Here's an example of a date field:



Change As Of	02/13/2017		
Address Type	Home		
Country	United States	Q	
Address 1	1000 Pine Drive		
Address 2			
Address 3			
City	Concord		
State	California	Q	
Postal	94518		
County	Contra Costa		





Step	Action
1.	This topic demonstrates how to enter a date in a Date field.
	You can enter a date using several different formats. The system will convert the date to the following format once you tab or click away from the Date field:
	MM/DD/YYYY
	February 15, 2017 will be saved as 02/15/2017.
	Dates must be entered using numbers. The date field will not accept alpha characters. The system will generate an error message if you use an invalid format. Click Ok on the error message box and use one of the formats demonstrated in this topic.

< Voluntary Deductions	Edit Voluntary I	Deductions	â	Q	۲	۲
David Smith						
 Pay Checks Direct Deposit W-4 Tax Information DE4 State Tax Information Voluntary Deductions 	Voluntary Deductions "Type of Deduction Flat Amount "Enter Amount Take deduction until I reach this Goal Amount "Enter Deduction Start Date Enter Deduction Stop Date Current Balance "Required Field Submit	20 200 (example: 12/31/2000) (example: 12/31/2000)				

Step	Action
2.	For this topic, we will use the Enter Deduction Start Date field on the Voluntary Deduction page: Employee Self Service > Payroll Tile > Voluntary Deductions > Add Deduction.
3.	For this example you will enter the date as 2/15/2017.



< Voluntary Deductions	Edit Voluntary D	eductions	Â	Q	۲	٢
David Smith						
 Pay Checks Direct Deposit W-4 Tax Information DE4 State Tax Information Voluntary Deductions 	Enter Deduction Stop Date	20 200 (example: 12/31/2000) (example: 12/31/2000)				

Step	Action
4.	Click in the Enter Deduction Start Date field.
	*Enter Deduction Start Date
5.	Enter the desired information into the Enter Deduction Start Date field. Enter "2/15/2017".
	*Enter Deduction Start Date
6.	Press [Tab].



< Voluntary Deductions	Edit Voluntary D	eductions	Â	Q	۲	Ξ	۲
David Smith							
👼 Pay Checks	Voluntary Deductions						
📥 Direct Deposit	*Type of Deduction	Charity Earth Share Calif Q					
W-4 Tax Information	Flat Amount	Amount					
DE4 State Tax Information	*Enter Amount	20					
S Voluntary Deductions	Take deduction until I reach this Goal Amount	200.00					
	*Enter Deduction Start Date	02/15/2017					
	Enter Deduction Stop Date	(example: 12/31/2000) (example: 12/31/2000) (example: 12/31/2000)					
	Current Balance	0.00					
	* Required Field Submit						

Step	Action
7.	Notice the system automatically changed the format of the date to $02/15/2017$.
8.	For this example you will enter the date as $02/15/2017$.
9.	Click in the Enter Deduction Start Date field. *Enter Deduction Start Date
10.	Enter the desired information into the Enter Deduction Start Date field. Enter "02/15/2017". *Enter Deduction Start Date
11.	Press [Tab].



< Voluntary Deductions	Edit Voluntary Deductions	Â	Q	۲	=	۲
David Smith						
Pay Checks	Voluntary Deductions					
	*Type of Deduction Charity Earth Share Calif Q					
W-4 Tax Information	Flat Amount					
DE4 State Tax Information	*Enter Amount 20					
S Voluntary Deductions	Take deduction until I reach this Goal Amount 200.00					
	*Enter Deduction Start Date 02/15/2017					
	(example: 12/31/2000)					
	Enter Deduction Stop Date					
	(example: 12/31/2000)					
	Current Balance 0.00					
	* Required Field Submit					

Step	Action
12.	Notice the system automatically changed the format of the date to $02/15/2017$.
13.	For this example you will enter the date as 02-15-2017.
14.	Click in the Enter Deduction Start Date field. *Enter Deduction Start Date
15.	Enter the desired information into the Enter Deduction Start Date field. Enter "02- 15-2017". *Enter Deduction Start Date
16.	Press [Tab].



< Voluntary Deductions	Edit Voluntary De	eductions	Â	Q	۲	Ξ	۲
David Smith							
🔁 Pay Checks	Voluntary Deductions						
📥 Direct Deposit	*Type of Deduction	Charity Earth Share Calif Q					
W-4 Tax Information	Flat Amount A	Amount					
DE4 State Tax Information	*Enter Amount	20					
Voluntary Deductions	Take deduction until I reach . this Goal Amount	200.00					
	*Enter Deduction Start Date	02/15/2017					
	Enter Deduction Stop Date	example: 12/31/2000)					
	Current Balance 0	0.00					
	* Required Field						

Step	Action
17.	Notice the system automatically changed the format of the date to $02/15/2017$.
18.	For this example you will enter the date as $2/15/17$.
19.	Click in the Enter Deduction Start Date field. *Enter Deduction Start Date
20.	Enter the desired information into the Enter Deduction Start Date field. Enter "2/15/2017". *Enter Deduction Start Date
21.	Press [Tab].



< Voluntary Deductions	Edit Voluntary Deductions	Â	Q	۲	=	۲
David Smith						
Pay Checks	Voluntary Deductions					
📥 Direct Deposit	*Type of Deduction Charity Earth Share Calif Q					
W-4 Tax Information	Flat Amount Amount					
DE4 State Tax Information	*Enter Amount 20					
S Voluntary Deductions	Take deduction until I reach this Goal Amount 200.00					
	*Enter Deduction Start Date 02/15/2017					
	(example: 12/31/2000)					
	Enter Deduction Stop Date					
	(example: 12/31/2000)					
	Current Balance 0.00					
	* Required Field					

Step	Action
22.	Notice the system automatically changed the format of the date to $02/15/2017$.
23.	For this example you will enter the date as $02/15/17$.
24.	Click in the Enter Deduction Start Date field. *Enter Deduction Start Date
25.	Enter the desired information into the Enter Deduction Start Date field. Enter "02/15/2017". *Enter Deduction Start Date
26.	Press [Tab].



< Voluntary Deductions	Edit Voluntary [Deductions	Â	Q	۲	Ξ	٢
David Smith							
🔁 Pay Checks	Voluntary Deductions						
📥 Direct Deposit	*Type of Deduction	Charity Earth Share Calif Q					
W-4 Tax Information	Flat Amount	Amount					
DE4 State Tax Information	*Enter Amount	20					
Voluntary Deductions	Take deduction until I reach this Goal Amount	200.00					
	*Enter Deduction Start Date	02/15/2017					
	Enter Deduction Stop Date	(example: 12/31/2000)					
	Current Balance	0.00					
	* Required Field Submit						

Step	Action
27.	Notice the system automatically changed the format of the date to $02/15/2017$.
28.	For this example you will enter the date as $2/15/2017$.
29.	Click in the Enter Deduction Start Date field. *Enter Deduction Start Date
30.	Enter the desired information into the Enter Deduction Start Date field. Enter "02/15/17". *Enter Deduction Start Date
31.	Press [Tab].



< Voluntary Deductions	Edit Voluntary Deductions	â	9	۲
David Smith				
Pay Checks	Voluntary Deductions			
📥 Direct Deposit	*Type of Deduction Charity Earth Share	2 Calif Q		
W-4 Tax Information	Flat Amount Amount			
DE4 State Tax Information	*Enter Amount 20			
S Voluntary Deductions	Take deduction until I reach this Goal Amount 200.00			
	*Enter Deduction Start Date 02/15/2017			
	(example: 12/31/200	00)		
	(example: 12/31/200			
	Current Balance 0.00			
	* Required Field Submit			

Step	Action
32.	Notice the system automatically changed the format of the date to 02/15/2017.
33.	For this example you will enter the date as 2-15-17.
34.	Click in the Enter Deduction Start Date field. *Enter Deduction Start Date
35.	Enter the desired information into the Enter Deduction Start Date field. Enter "2- 15-17". *Enter Deduction Start Date
36.	Press [Tab].



< Voluntary Deductions	Edit Voluntary Deductions	â	Q	۲	=	٢
David Smith						
Pay Checks Direct Deposit W-4 Tax Information	Voluntary Deductions "Type of Deduction Charity Earth Share Calif Q Flat Amount Amount					
DE4 State Tax Information Voluntary Deductions	*Enter Amount 20 Take deduction until I reach this Goal Amount 200.00					
	*Enter Deduction Start Date 02/15/2017 1111 (example: 12/31/2000) Enter Deduction Stop Date 12/31/2000 (example: 12/31/2000)					
	Current Balance 0.00 * Required Field Submit					

Step	Action
37.	Notice the system automatically changed the format of the date to $02/15/2017$.
38.	For this example you will enter the date as 02-15-17.
39.	Click in the Enter Deduction Start Date field. *Enter Deduction Start Date
40.	Enter the desired information into the Enter Deduction Start Date field. Enter "02- 15-17". *Enter Deduction Start Date
41.	Press [Tab].



< Voluntary Deductions	Edit Voluntary Deductions	Â	Q	۲	=	٢
David Smith						
nay Checks	Voluntary Deductions					
🍐 Direct Deposit	*Type of Deduction Charity Earth Share Calif Q					
W-4 Tax Information	Flat Amount Amount					
DE4 State Tax Information	*Enter Amount 20					
S Voluntary Deductions	Take deduction until I reach this Goal Amount 200.00					
	*Enter Deduction Start Date 02/15/2017					
	(example: 12/31/2000)					
	Enter Deduction Stop Date					
	(example: 12/31/2000)					
	Current Balance 0.00					
	* Required Field Submit					

Step	Action
42.	Notice the system automatically changed the format of the date to $02/15/2017$.
43.	End of Procedure.

Using the Calendar button to select a date

Each date field in Fluid contains a Calendar button. You can use this button to select a date. The calendar button in fluid works the same as the calendar button on classic PeopleSoft pages.

Here an example of the Calendar button:



Change As Of	02/13/2017		
Address Type	Home	\mathbf{U}	
Country	United States	Q	
Address 1	1000 Pine Drive		
Address 2			
Address 3			
City	Concord		
State	California	Q	
Postal	94518		
County	Contra Costa		

Clicking the Calendar button opens the Calendar window. You can use this window to select a date. This window works the same way as the calendar window on classic PeopleSoft pages.

. 1		-		017	-		
ebri	uary		~ 2	017	_		
s	М	т	W	т	F	S	
			1	2	3	4	
5	6	7	8	9	10	11	Q
2	13	14	<mark>1</mark> 5	16	17	18	
9	20	21	22	23	24	25	-
6	27	28					

Here is an example of the Calendar window:

To use this window:

- 1. The current date is selected—in the example here February 13, 2017.
- 2. Use the month and year drop downs to select the month and year of the date you want to include in the date field



- 3. Click on the date in the calendar to select the day of the month
- 4. If you want to be sure that the date field will contain the current date, click the current date link
- 5. Once you have selected a day of the month, the calendar window will close and the date field will be populated with the date you have selected

Step	Action
1.	This topic demonstrates how to use the Calendar or Choose a Date button to select
	a date.

< Voluntary Deductions	Edit Voluntary D	Deductions	Â	Q	۲	≡	٢
David Smith							
 Pay Checks Direct Deposit W-4 Tax Information DE4 State Tax Information Voluntary Deductions 	Enter Deduction Stop Date	20 200 (example: 12/31/2000) (example: 12/31/2000)	Look Up	Date	butto	n	
	Current Balance * Required Field Submit	0.00					

Step	Action
2.	For this topic, we will use the Enter Deduction Start Date field on the Voluntary deduction page: Employee Self Service > Payroll Tile > Voluntary Deductions > Add Deduction.
3.	First, you will use the Choose a Date button to select 3/15/2017.



Voluntary Deductions	Intary Deductions Edit Voluntary Deductions							
David Smith								
Ray Checks	Voluntary Deductions							
📥 Direct Deposit	*Type of Deduction	Charity Earth Share Calif Q						
W-4 Tax Information	Flat Amount	Amount						
DE4 State Tax Information	*Enter Amount	20						
S Voluntary Deductions	Take deduction until I reach this Goal Amount	200						
	*Enter Deduction Start Date							
		(example: 12/31/2000)						
	Enter Deduction Stop Date							
		(example: 12/31/2000)						
	Current Balance	0.00						
	* Required Field Submit							

Step	Action
4.	Click in the Enter Deduction Start Date field.

< Voluntary Deductions	Edit Voluntary I	â	Q	۲	Ξ	٢	
David Smith							
🔁 Pay Checks	Voluntary Deductions						
📥 Direct Deposit	*Type of Deduction	Charity Earth Share Calif Q					
W-4 Tax Information	Flat Amount	Amount					
ST DE4 State Tax Information	*Enter Amount	20					
S Voluntary Deductions	Take deduction until I reach this Goal Amount	200					
	*Enter Deduction Start Date						
		(example: 12/31/2000)					
	Enter Deduction Stop Date						
		(example: 12/31/2000)					
	Current Balance	0.00					
	* Required Field Submit						



Step	Action
5.	Click the Choose a date button.

Voluntary Deductions		E	dit V	/olur	ntary	Ded	uctio	ons			Â	Q	۲	=	۲
David Smith															
Ray Checks	Volu	Voluntary Deductions									ор	dow	n		
Direct Depose Month drop down		*	Туре	of Dec	luctio	h Ch	arity Ea		nare Calif Q						
W-4 Tax Information	_				alend			×)			
DE4 State Tax Information		Febr		_	∨ [2	2017		¥							
S Voluntary Deductions	Та	s	м	т	W 1	т 2	F 3	S 4							
Day of Month	-E	5	6	7	8	9	10	11	Ē						
	- 1	12	13	14	15	16	17	18	000)						
	E	19	20	21	22	23	24	25	Ē						
	-	20	27	28					000)						
		(1)		Cu	irrent E	lato		۲							
	* Reg	-		00		ale									
	Sur	mit													

Step	Action
6.	The Calendar page displays. The current date is selected.
	For this example the current date is 2/22/2017.
7.	Begin by changing the month from February to March.
	Click the Month drop down.
	February
8.	Click the March list item.
	March



< Voluntary Deductions	Edit Voluntary Deductions										Q	۲	۲
David Smith													
Pay Checks	Volu	ntar	/ De	duct	ions								
🍰 Direct Deposit						1 Ch	arity E	arth Sh	are Calif Q				
W-4 Tax Information				с	alend	ar		×					
DE4 State Tax Information		Marc	h		▶ 2	017		~					
S Voluntary Deductions	Та	s	м	т	w	т	F	S					
	*E	5	6	7	1 8	2 9	3 10	4 11					
		12	13	14	15	16	17		000)				
	Е	19	20	21	22	23	24	25					
		26	27	28	29	30	31		000)				
		()		0	rrent D	lato		۲					
	* Reg			Cu	ineni D	ale		C					
	Suit	σπιτ											

Step	Action
9.	Note: March now displays in the Month drop down.
	For this example you do not have to select a different year.
	If the date you want is in a different year from the current year (or the year displayed in the Year drop down, use the drop down to select the appropriate year.
	Next, select the day of the month. The current day (the 22nd) is currently selected. You must click on a day in the calendar in order to save the date you are entering.
10.	In this example, you want to select the 15th.
	Click 15.



Voluntary Deductions	Edit Voluntary Deductions	â	Q	۲	٢
David Smith					
 Pay Checks Direct Deposit W-4 Tax Information DE4 State Tax Information Voluntary Deductions 	Voluntary Deductions "Type of Deduction Charity Earth Share Calif Q. Flat Amount Amount "Enter Amount 20 Take deduction until I reach this Goal Amount 200.00 Enter Deduction Start Date 33/15/2017 20 (example: 12/31/2000) Enter Deduction Stop Date (example: 12/31/2000) Current Balance 0.00 * Required Field Submit				

Step	Action
11.	Notice the Calendar page closes and the date you selected, 3/15/2017, now displays in the Enter Deduction Start Date f ield.
12.	Next, you will use the Choose a Date button to change the date you just selected back to the current date, 2/2/2017.
13.	Click the Choose a date button.



< Voluntary Deductions		E	dit V	'olur	ntary	Ded	uctio	ons		Q	۲	۲
David Smith												
👼 Pay Checks	Volu	ntary	/ Dec	duct	ions							
📥 Direct Deposit	-	*	Туре	of Dec	luction	n Ch	arity E	arth Sh	nare Calif Q			
W-4 Tax Information				с	alend	ar		×				
TE4 State Tax Information		Marc	h		~ 2	2017		~				
locations	Та	s	м	т	w	т	F	s				
	*E	5	6	7	1 8	2 9	3 10	4 11				
		12	13	14	15	16	17	18	000)			
	E	19	20	21	22	23	24	25				
		26	27	28	29	30	31		000)			
				_			1		000)			
	* Req	۲		Cu	rrent D	ate)		۲				
	Sup	mit						_				

Step	Action
14.	The Calendar page currently displays 3/15/2017, the date you just selected.
	You can use the Current Date link to select the current date.
15.	Click the Current Date link. Current Date

Voluntary Deductions	Edit Voluntary I	Deductions	â	Q	۲	٢
David Smith						
💦 Pay Checks	Voluntary Deductions					
📥 Direct Deposit	*Type of Deduction	Charity Earth Share Calif Q				
W-4 Tax Information	Flat Amount	Amount				
DE4 State Tax Information	*Enter Amount	20				
S Voluntary Deductions	Take deduction until I reach this Goal Amount	200.00				
	*Enter Deduction Start Date	02/22/2017				
	Enter Deduction Stop Date	(example: 12/31/2000)				
	Current Balance	0.00				
	* Required Field					



Step	Action
16.	Notice the Enter Deduction Start Date field now displays the current date, for this example 2/22/2017.
17.	End of Procedure.

Entering Phone Numbers

You can enter phones in the following formats:

555-555-1212

555/555-1212

The system changes the format to 555/555-1212

These fields function just like phone number fields in Classic PeopleSoft pages.

Here is an example of a phone number field.

toile Cancel	Phone Nur	nber	Save
	Type Home Preferred Number 510/555-1212		
	Extension		
23	Delete		

Step	Action
1.	This topic demonstrates how to enter phone numbers. You can use either of two
	formats: xxx-xxx or xxx/xxx-xxxx.



Step	Action
2.	First you will enter a phone number using the following format:
	xxx-xxx-xxxx
	Sample: 555-555-1212

< My Homepage	Personal Details	Â	9		Ø
David Smith 📀					
Addresses	Contact Details Cancel Phone Number Save	1			
Ethnic Groups	*Type Mobile 💟	Туре	Pre	ferred	
Emergency Contacts	Preferred	Business		 > 	
🔓 Additional Information	Number Extension	Home		>	
Veteran Status					
		Туре	Pref	ferred	
		Business		~	

Step	Action
3.	Click in the Number field.
	Number
4.	Enter the desired information into the Number field. Enter "555-555-1212".
	Number
5.	Click in the Extension field.
	Extension



< My Homepage	Personal Details			Q	۲	≡	٢
David Smith 📀							
Addresses	Contact Details	Save					
Ame Kennic Groups Contacts Additional Information Line Disability	Type Mobile ♥ Preferred □ Number 555/555-1212 Extension	E	Type Business Home		Preferr ~		>
🔏 Veteran Status			Type Business		Preferm	ed	

Step	Action
6.	Note the system automatically changed the format of the phone number to 555/555-1212.
7.	Next you will enter the phone number using the following format:
	XXX/XXX-XXXX
	Sample: 555/555/1212
8.	Click in the Number field.
	Number
9.	Enter the desired information into the Number field. Enter "555/555-1212".
	Number
10.	Click in the Extension field.
	Extension



< My Homepage	I	Personal Details	Â	Q	۲	≡	ø
David Smith 😔							
Addresses	Contact Deta	ils					
- Name	Cancel	Phone Number Save					
thnic Groups	*Туре	Mobile 🔽	Туре		Preferr	ed	
Central Emergency Contacts	Preferred		Business		~	;	>
Additional Information	Number	555/555-1212	Home			;	>
Disability	Extension						
Leteran Status							
			Туре		Preferr	ed	
			Business		~		

Step	Action
11.	Notice the system maintained the format you used to enter the phone number, the standard format for PeopleSoft.
12.	End of Procedure.

Working with Fluid Grids

Data in Fluid pages is often displayed in a grid. This is true for many displays of data in the information panel of a fluid page and in search results on Look Up pages.

Here is an example of a fluid grid:

< My Homepage		Payr	oll Self Service		🔒 Q 🏲	8
David Smith HR SYSTEMS SPECIALIST						
Pay Checks	Pay Checks					
W-4 Tax Information	T					Ťĺ.
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number / PDF Check	
Voluntary Deductions	11/10/2016	Contra Costa County	10/01/2016 10/31/2016	\$3325.36	3177833	>
	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	3161167	>
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76	3144587	>
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13	3128123	>

Here is an example of a grid on a lookup page:



Cancel			Look	1p	
Search for: *Ethnic Group					Show Operators
	Ethnic Group (begins with) Description (begins with)				
Search Results		Search	Clear		
					4 rows
Ethnic Group 0				Description 0	
AMIND				American Indian/Alaska Native	
				American Indian/Alaska Native Asian	
AMIND					

Procedure

ORACLE	▼ Employee Self Service	^ Q	₹ = (۵
Benefits	Payroll	Personal Details		
Company Directory				
	••••		c	2

Step	Action
1.	Click the Payroll tile.



< My Homepage			Payroll Self Ser	vice		Â	Q	۲	≡	ø
David Smith Filter Button					Sort	: Arro	ows			
Pay Checks		Pay Check	S						î↓	
The grid currently displays		Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Payc PDF	heck N Check	umber /		
8/10/2016 b& 11/10/2016 and is sorted in		11/10/2016	Contra Costa County	10/31/2016	\$3325.36	31778	833		>	
descending order based on Check Date.		10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	3161	167		>	
	1	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76	3144	587		>	
		08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13	3128	123		>	
	-									

Step	Action
2.	The Pay Check page displays. This page currently displays your four most recent pay checks. These checks cover the period between 8/10/2016 and 11/10/2016.
	You can use the Filter button and the Sort Arrows to change what information is displayed in the grid and the order in which it is displayed.

< My Homepage		Payroll Self Ser	vice		â	Q	۲	≡	ø
David Smith									
Pay Checks	Pay Check	s							
🍰 Direct Deposit									
W-4 Tax Information	Ŧ							î↓	
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paych PDF C	eck Nı heck	umber /		
SVoluntary Deductions	11/10/2016	Contra Costa County	10/31/2016	\$3325.36	31778	33		>	
	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	316116	67		>	
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76	314458	37		>	
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13	312812	23		>	



Step	Action
3.	For this example, you will first select to view all pay checks issued between $10/1/2016$ and $11/10/2016$.

< My Homepage	P	Payroll Self Ser	vice		<u>ନ</u> ୍	۲ =	(
David Smith							
Pay Checks	Pay Checks						
Direct Deposit W-4 Tax Information	T					↑↓	
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Nu PDF Check	mber /	
Voluntary Deductions	11/10/2016	Contra Costa County	10/31/2016	\$3325.36	3177833	>	
	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	3161167	>	
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76	3144587	>	
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13	3128123	>	

Step	Action
4.	Click the Filter button.
5.	Click in the From field.
	Filter
	From 08/10/2016
	To 11/10/2016
6.	Enter the desired information into the From field. Enter "10/1/2016".
	From 08/10/2016
7.	Click the Done button.
	Done



< My Homepage		Payroll Self Ser	vice		Â	Q	۲	≡	ø
David Smith									
Pay Checks	Pay Check	s							
🛓 Direct Deposit		-							
W-4 Tax Information	T							↑↓	
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Payo PDF	heck N Check	umber	/	
SVoluntary Deductions	11/10/2016	Contra Costa County	10/01/2016 10/31/2016	\$3325.36	3177	833		>	
	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	3161	167		>	

Step	Action
8.	Notice, the grid now displays only two checks, those issued on 11/10/2016 and 10/10/2016. These checks fall within the date range you set on the Filter page. Next, you will set a filter to display all checks issued between July 1, 2016 and November 10, 2016.
9.	Click the Filter button.
10.	In this example you will use the calendar button to select a date for the From field. Click the Choose a date button.



< My Homepage					Pa	yrol	l Self	Service	Â	Q	۲ =	
David Smith									_			
Month drop do	wn							Year drop dowr	1			
Pay Checks			Pay	Cheo	cks							
🍰 Direct Deposit										-		1
W-4 Tax Information Can			C	alend	lar		K	f	Done			
📝 DE4 State Tax Informa	Octo	ber		~	2016		~			eck Nu heck	mber /	
Voluntary Deductions	S	м	т	w	т	F	S			2		
		0		~	0	7	1			.5	>	
	2	3 10	4 11	5 12	6 13	7 14	8 15			17	>	
	16	17	18	19	20	21	22			-		
	23	24	25	26	27	28	29					
	30	31										
	۲		Cu	rrent D	Date		۲					
		~]				
	/											
Current Date li	nk											
	_											

Step	Action
11.	Use the drop downs to select a month and. if necessary to change the year. Then select a date from the calendar. To select the current date, click the Current Date link.
12.	Click the Month list. October
13.	Click the July list item. July
14.	Click 1.
15.	Note, the From field now populates with the date you selected. For this example, you do not need to change the date in the To field. Click the Done button.



< My Homepage		Payroll Self Ser	vice		Â	Q	۲	≡	Ø
David Smith									
Pay Checks Direct Deposit W-4 Tax Information	Pay Check	S						d Sort ↑↓	
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Payo PDF	heck N Check	umber /	'	
Voluntary Deductions	11/10/2016	Contra Costa County	10/31/2016	\$3325.36	3177	833		>	
The grid now includes	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	3161	167		>	
checks between 7/1/2016 and	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76	3144	587		>	
11/10/2016.	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13	3128	123		>	
	07/08/2016	Contra Costa County	06/01/2016 06/30/2016	\$4122.25	3111	642		>	

Step	Action
16.	Next, you will use the sort arrows to change the order in which information is displayed in the grid.
17.	Click the Grid Sort button.

K My Homepage		Payroll Self Ser	vice	Grid Sort	× = @
David Smith				Check Date	
				Company	
Pay Checks	Pay Check	S		Pay Begin Date	
Direct Deposit				Pay End Date	
W-4 Tax Information	T			Net Pay	ŢĻ.
TE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Paycheck Number	,
SVoluntary Deductions	11/10/2016	Contra Costa County	10/31/2016	\$3325.36 3177833	>
	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59 3161167	>
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76 3144587	>
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13 3128123	>
	07/08/2016	Contra Costa County	06/01/2016 06/30/2016	\$4122.25 3111642	>



Step	Action
18.	The Grid Sort menu displays. You can sort the grid on any of the items lists in the Grid Sort menu. Each item acts as a togglesorting the grid in either ascending or descending order. Click on a menu item to sort the grid.
	For this example, you will first sort the grid on Net Pay. Currently the grid is sorted on Check Date (in descending orderthe most recent date on the top).
19.	Click the Net Pay link.
	Net Pay

< My Homepage		Payroll Self Ser	vice	Grid Sort	×	Ξ	۲
David Smith				Check Date			
				Company			
Ray Checks	Pay C Asc	ending Order		Pay Begin Date			
🍰 Direct Deposit				Pay End Date			
W-4 Tax Information	Ŧ			Net Pay		<u></u>	
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Paycheck Number		/	
SVoluntary Deductions	10/10/2016	Contra Costa County	09/30/2016	\$3244.59 3161167		>	
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76 3144587		>	
	11/10/2016	Contra Costa County	10/01/2016 10/31/2016	\$3325.36 3177833		>	
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13 3128123		>	
	07/08/2016	Contra Costa County	06/01/2016 06/30/2016	\$4122.25 3111642		>	

Step	Action
20.	Notice the grid is now sorted on Net Pay in ascending orderthe largest net pay is on the bottom. You will toggle the sort order by clicking again on the Net Pay menu item.
21.	Click the Net Pay link.
	▲ Net Pay



< My Homepage		Payroll Self Ser	vice	Grid Sort	×		Ø
David Smith				Check Date			
Č				Company			
Pay Checks	Pay C Des	cending Order		Pay Begin Date			
📥 Direct Deposit				Pay End Date			
W-4 Tax Information	Ŧ			Net Pay		<u></u> ↑↓	
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Paycheck Number		1	
S Voluntary Deductions	07/08/2016	Contra Costa County	06/30/2016	\$4122.25 3111642		>	
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13 3128123		>	
	11/10/2016	Contra Costa County	10/01/2016 10/31/2016	\$3325.36 3177833		>	
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76 3144587		>	
	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59 3161167		>	

Step	Action					
22.	Notice the grid is now sorted in descending order based on Net Paythe smallest net bay amount is on the button row of the grid.					
23.	Next, you will sort the grid on Check date.					
	Check Date					



< My Homepage			Payroll Self Ser	vice	Grid Sort	×	
David Smith							
					Company		
Pay Checks	Pa	y c Asce	ending Order		Pay Begin Date		
Direct Deposit		-			Pay End Date		A 1
W-4 Tax Information		Ŧ			Net Pay		Ĵ.T
DE4 State Tax Information		Check Date	Company	Pay Begin Date / Pay End Date	Paycheck Number		
Voluntary Deductions		07/08/2016	Contra Costa County	06/30/2016	\$4122.25 3111642		>
	C	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13 3128123		>
	C	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76 3144587		>
	1	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59 3161167		>
	1	11/10/2016	Contra Costa County	10/01/2016 10/31/2016	\$3325.36 3177833		>

Step	Action
24.	Notice the grid is now sorted in ascending order based on Check Date. Next you will toggle the sort to sort on Check Date in Descending order.
25.	Click the Check Date link.
	▲ Check Date

< My Homepage		Payroll Self Ser	vice	Grid Sort	×		۲
David Smith				Check Date			
				Company			
Pay Checks	Pay C Des	cending Order		Pay Begin Date			
🍰 Direct Deposit				Pay End Date			
W-4 Tax Information	T			Net Pay		<u></u> ↑↓	
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Paycheck Number		1	
SVoluntary Deductions	11/10/2016	Contra Costa County	10/31/2016	\$3325.36 3177833		>	
	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59 3161167		>	
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76 3144587		>	
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13 3128123		>	
	07/08/2016	Contra Costa County	06/01/2016 06/30/2016	\$4122.25 3111642		>	



Step	Action
26.	Notice the grid is now sorted with the most recent check at the top.
27.	Click the Close button.
28.	Click the Home button.
29.	
	End of Procedure.

Using Save and Cancel Buttons

Save and Cancel button on Fluid pages work the same as Save or Cancel buttons on Classic pages.

Clicking a Save button saves (writes to the database) and information you have entered and opens a confirmation page or displays a confirmation message in the banner at the top of the fluid page. Clicking a cancel button discards any information you have entered and returns you to the previous page.

Here is an example of a Fluid page that has a Save and a Cancel button.

Cancel		Phone N	umber	Save
	*Type Preferred			
96	Number		Save Butto	n
	Extension			
kis				
na				



Cancel	Phone Number	Save
	* Trbe	
	Preferred	
95	Num Cancel Button	
I	Extension	
kis		_
na		

Procedure

Step	Action
1.	This topic demonstrates how to use the Cancel and Save buttons.
2.	In the first example, you will begin to add a phone number and then decide to cancel. The information you entered is not saved or written to the database.





Step	Action
3.	You will navigate to the Personal Details page and then select Contact Details in the action panel. Click the Personal Details object.
4.	Click the Contact Details link.



< My Homepage	Personal Details		â	Q	۲		٢
David Smith 🕑							
X Addresses	Contact Details						
Contact Details	Phone						
S Name	+						
🕵 Ethnic Groups	Number	Extension	Туре		Prefer	red	
Emergency Contacts			Business		~	;	>
Additional Information	510/555-1212		Home			;	,
الغ Disability							_
4 Veteran Status	Email						
	+						
	Email Address		Туре		Prefer	red	
			Business		~		

Step	Action
5.	Notice the Phone grid displays two phone numbers, a business phone and a home phone. You will start to add a third number, a pager.
6.	Click the Add Phone button to begin adding phone number information.
7.	Click the Type list. *Type



< My Homepage		Personal Details		Q	۲	≡	٢
David Smith ⊙							
Addresses	Contact Deta	ils					
- Name	Cancel	Phone Number Save					
tthnic Groups	*Туре		Туре		Preferr	ed	
Central Emergency Contacts	Preferred	Mobile Pager 1	Business		~	;	>
Additional Information	Number		Home			;	>
L Disability	Extension						
Veteran Status							
			Туре		Preferr	ed	
			Business		~		

Step	Action
8.	Click the Pager 1 list item.
	Pager 1

< My Homepage		Personal Details	Â	9 7	
David Smith 📀					
X Addresses	Contact Deta	ils			
Contact Details	Dhone				
- Name	Cancel	Phone Number Save			
thnic Groups	*Туре	Pager 1	Туре	Prefer	red
Contacts	Preferred		Business	~	>
Additional Information	Number		Home		>
L Disability	Extension				
🔏 Veteran Status					
			Туре	Prefer	red
			Business	~	



Step	Action
9.	Click in the Number field.
	Number
10.	Enter the desired information into the Number field. Enter "555/555/1212".
	Number

< My Homepage		Personal Details	Â	Q 🚩	Ξ	۲
David Smith 😔						
Addresses	Contact Deta	ils				
Name	Cancel	Phone Number Save				
Kan Ethnic Groups	*Type	Pager 1	Туре	Prefe	red	
Central Emergency Contacts	Preferred		Business	~	>	
Additional Information	Number	555/555/1212 ×	Home		>	
L Disability	Extension					
Veteran Status						
			Туре	Prefer	red	
			Business	~		

Step	Action
11.	You have decided not to add this phone. You will use the Cancel button to discard the information you just entered. The Phone Number page will close and you will be returned to the Contacts Details page.
12.	Click the Cancel button.



< My Homepage	Personal	Details		Q P	∎ Ø
David Smith _©					
Addresses	Contact Details				
🧶 Contact Details	Phone				
Ethnic Groups	+ Number	Extension	Туре	Preferre	ed
Centracts			Business	~	>
Additional Information	510/555-1212		Home		>
Ł Disability					
Veteran Status	Email				
	+				
	Email Address		Туре	Preferre	d
			Business	~	

Step	Action	
13.		began to enter and then canceled was not saved. wo phone numbers that it initially had.
14.	In this example, you will add and sa	ave a new phone to the Phone grid.
15.	Click the Add Phone button. Contact Details Phone	
	Number Extension	Туре
		Business
	925/558-5524	Home
16.	Click the Type list.	



< My Homepage		Personal Details		۲ :		٢
David Smith ⊙						
X Addresses	Contact De	tails				
Contact Details	Dhana					
Name	Cancel	Phone Number Save				
Kan Steel St	*Тур	e	Туре	Preferre	d	
Contacts	Preferre	Mobile d Pager 1	Business	~	;	>
Additional Information	Numbe	er 📃	Home		;	>
الله Disability	Extensio	n				
省 Veteran Status						
			Туре	Preferre	ł	
			Business	~		

Step	Action
17.	Click the Mobile list item.
	*Type Mobile Preferred Number



< My Homepage		Personal Details		~		۲
David Smith 🕢						
X Addresses	Contact Deta	ils				
- Name	Cancel	Phone Number Save				
thnic Groups	*Type	Mobile	Туре	Preferre	d	
Central Emergency Contacts	Preferred		Business	~	>	>
Additional Information	Number		Home		>	>
L Disability	Extension					
Leteran Status						
			Туре	Preferre	d	
			Business	\checkmark		

Step	Action
18.	Click in the Number field.
	*Type Mobile
	Preferred
	Number
	Extension
19.	Enter the desired information into the Number field. Enter "925/556-2112".
	*Type Mobile 🔽
	Preferred
	Number
	Extension
20.	Click the Save button.
	Cancel Phone Number Save
	*Type Mobile 💟
	Preferred
	Number 925/556-2112 ×
	Extension



< My Homepage	Personal	Details	1	۲	
	You have successfully add	ed your "Mobile" phone.			
Addresses	Contact Details				
Contact Details	Phone				
Name	+				
Ethnic Groups	Number	Extension	Туре	Preferr	ed
Emergency Contacts			Business	~	>
Additional Information	925/556-2112		Mobile		>
	925/558-5524		Home		>
	Email				
	+				
	Email Address		Туре	Preferr	ed
			Business	~	

Step	Action
21.	Notice the system issues a message across the top of the page indicating that you have successfully added your mobile phone. Also notice that the Phone grid now lists three phone types.
22.	End of Procedure.

Using Confirmation pages

Confirmation pages in fluid display after you have added new data or have selected to delete data. These pages ask you to acknowledge that the data you have added has been submitted to the database. In some cases it may require further approval or processing before it is added to the permanent record in the database. A delete confirmation displays if you have opted to delete an item; this page asks you to confirm that you, in fact, want to delete the item.

Here is an example of a page that confirms that your submission was successful.

Confin	m Submit	â	Q	٣	E
Direct Deposit Form Su	ubmission Was Successful				
Direct Deposit					
\bigcirc	ĸ				
The Submit was successful.	Due to timing, your change n	nay not be reflected or	the ne	xt payc	heck.



Click the OK button.

Here is an example of a page that asks you to confirm that you want to delete a phone number.

Cancel	Phone Number Sa	ve
	Type Mobile 🔽	Тур
	Preferred	Busi
Δre	you ours you want to delete your "Mehile" phone?	
740	you sure you want to delete your "Mobile" phone?	Mob
	Yes No	Mob
	Yes No	
	Yes No	

Click the Yes button to confirm the delete. Click the No button if you decide you do not want to delete the information.

Using Lookups

Some fields on fluid pages contain a lookup button ("magnifying glass"). These buttons work the same as a lookup button on a classic PeopleSoft page. You use the button to display a list of valid values for the field.

0	Cancel	Ethnic Group	Save
1 F	Pr	imary Yes	
a	*Ethnic (Group	
p D			
t		Look Up by	tton
		Look Up bu	

Here's an example of a fluid field with a lookup icon.

When you click a lookup button the system displays a Lookup page that lists all valid values for the field. Here's an example of a lookup page:



Cancel	Lookup	
Search for: "Ethnic Group > Search Criteria - Search Results	Look Up Selections	
		3 rows
Ethnic Group 🗘	Description \diamond	
AMIND	American Indian/Alaska Native	
ASIAN	Asian	
PACIF	Pacific Islander	

Values are displayed in a grid. Click on a value to select it. The selected value will populate the field.

Note: You can type directly in a field with a lookup icon. The search results will return all values that begin with the characters you typed in the field.

You can use the Search Criteria section (collapsed in the previous screen shot) to limit the values displayed if the number of values returned is large.

Here's an example of a Lookup page with the search criteria expanded:

Cancel			Look	ıp
Search for: *Ethnic Group				Show Operators
	Ethnic Group (begins with) Description (begins with)			
- Search Results		Search	Clear	
				4 rows
Ethnic Group \bigcirc				Description 0
AMIND				American Indian/Alaska Native
ASIAN				Asian
BLACK				Black/African American
PACIF				Pacific Islander

Procedure

Step	Action
1.	This topic demonstrates how to use lookups.



< My Homepage	Personal Details	Â	Q	۲	≡	Ø
David Smith ⊙						
Addresses	Ethnic Groups					
	ancel Ethnic Group Save					
Ce Emergency Contacts	Primary No					
Additional Information	*Ethnic Group	orting re n these l nission o atment. vith the p informa on repor	aws, the f this inf The info provision tion to b ted, data	e employ ormation ormation is of app e summ	ver n is plicable arized	
	North Africa, or the Middle East.	the origi		les of E	urope,	
	 Black (not or Hispanic origin): All persons having origins in any of Bispanic: All persons of Mexican, Puerto Rican, Cuban, Central or culture or origin, regardless of race. Asian or Pacific Islander: All persons having origins in any of the Southeast Asia, the Indian Subcontinent, or the Pacific Islands. Thi China, India, Japan, Korea, the Philippine Islands, and Samoa. American Indian or Alaskan Native: All persons having origins in North America, and who maintain cultural identification through thb recognition. 	South An original pe s area inc any of the	eoples of udes, fo	or other f the Fai r examp	Spanis r East, ble,	sh

Step	Action
2.	Click the Look up Ethnic Group button to access the Lookup page for Ethnic Group.

< My Homepage		Personal Details		2 2		۲
David Smith	Cancel	Lookup				
č	Search for: *Ethnic Group					
Addresses	 Search Criteria Search Results 					
Contact Details	· · · · · · · · · · · · · · · · · · ·		4 rows			
Name	Ethnic Group ♦	Description ◇				
tethnic Groups	AMIND	American Indian/Alaska Native		-		
Emergency Contacts	ASIAN	Asian				
Additional Information	BLACK	Black/African American		ements for the employ s information	er	
Veteran Status	PACIF	Pacific Islander		information isions of app to be summa	licable arized	
				data will not		ý
				ed: peoples of Eu	urope,	
				cial groups of	f Africa	l.
				can, or other	Spanis	sh
				es of the Far s, for examp		
				ginal peoples community	of	



Step	Action
3.	The Search Results display in a grid as a table. In this example all possible results display.
	The grid has two columns Ethnic Group and Description . The header labels for each of these columns is a toggle. Clicking on one of the headers toggles the order in which the results are displayed between ascending and descending order.
	You will explore each of these toggles, starting with Ethnic Group .
4.	Currently Ethnic Groups are displayed in Ascending order.
	Click the Ethnic Group link.
	Ethnic Group 🛇

< My Homepage		Personal Details		2 🏲 🗏 🙆
David Smith	Cancel	Lookup		
	Search for: *Ethnic Group			
Addresses	Search Criteria			
Addresses	 Search Results 			
Contact Details			4 rows	
Name	Ethnic Group =	<u>Description</u> ≎		
Ethnic Groups	PACIF	Pacific Islander		
Emergency Contacts	BLACK	Black/African American		
🔒 Additional Information	ASIAN	Asian		ements for the , the employer s information is
Veteran Status		American Indian/Alaska Native		information isions of applicable to be summarized
				data will not identify
				ed: peoples of Europe,
				cial groups of Africa.
				can, or other Spanish
				es of the Far East, s, for example,
				ginal peoples of community

Step	Action
5.	Notice the Ethnic Group column now displays in descending order.
6.	In this example, the Description column also displays in descending order.
	Note it is not always the case that the order of columns in a grid mirror one another.
	Click the Description link to toggle the display so that the values in the description field display in ascending order. Description



< My Homepage		Personal Details		α	~		Ø
David Smith (Cancel	Lookup					
	Search for: *Ethnic Group						
Addresses	Search Criteria						
	 Search Results 						
Contact Details			4 rows				
Sen Name	Ethnic Group \Diamond	Description					
Ethnic Groups		American Indian/Alaska Native					
Emergency Contacts	ASIAN	Asian					
Additional Information					s for th		
E Disability	BLACK	Black/African American		s infor	employe mation		
🛃 Veteran Status	PACIF	Pacific Islander			nation of appl summa		ļ
					vill not i		y
				ed: people	s of Eu	rope,	
				cial gro	oups of	Africa	ā.
				can, or	other \$	Spanis	sh
					he Far I example		
				ginal p comm	eoples nunity	of	

Step	Action
7.	Notice the values in the Description column now display in ascending order.
8.	Click the List option to display the values in the search results as a list.
9.	Click the Grid Sort button to begin changing the sort order of the list.



< My Homepage	Personal Detail	S			Ø
David Smith (Cancel Lookup				
	Search for: *Ethnic Group				
Addresses	Search Criteria	Grid Sort ×			
	Search Results	Ethnic Group			
Contact Details			rows		
Name		 Description 	TT.		
Kan Ethnic Groups	Ethnic Group AMIND Description American Indian/Alaska Native				
Emergency Contacts	Ethnic Group ASIAN Description Asian				
Additional Information	Ethnic Group BLACK			ements for the	
🧞 Disability	Description Black/African American			s, the employer s information is	
A Veteran Status	Ethnic Group PACIF Description Pacific Islander			information isions of applicable	
-	Description			to be summarized data will not identif	v
				ed: peoples of Europe,	
				beoples of Europe,	
				cial groups of Africa	1.
				can, or other Spanis	sh
				es of the Far East, s, for example,	
				ginal peoples of community	

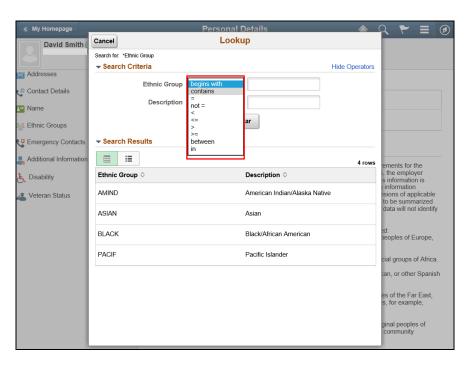
Step	Action			
10.	A Grid Sort menu displays. The items in the menu are toggles which toggle display based on Ethnic Group or Description between ascending and descending order.			
	You will experiment by using the menu items to change the display of the list.			
11.	The list is now displayed in ascending order by description.			
	Click the Description link.			
	Description			
12.	Click the Ethnic Group link to change the display by Ethnic Group.			
	Ethnic Group			
13.	Click the Close button.			
14.	Click the Grid option.			
15.	Next you will explore how to use search filters to narrow search results.			
16.	Click the Search Criteria link to expand the Search Criteria section.			
	Search Criteria			



Step	Action				
17.	Begin by using the Ethnic Group field to limit search results to those ethic groups that begin with "p"				
	Click in the Ethnic Group field.				
	(begins with)				
18.	Enter the desired information into the Ethnic Group field. Enter " p ".				
	(begins with)				
19.	Click the Search button.				
	Search				
20.	Notice, only one Ethnic Group now appears in the Search Results , PACIF. This group begins with a "p".				
	Click the Search Criteria link to expand the Search Criteria section.				
	► Search Criteria				
21.	Click the Clear button to clear the search criteria.				
	Clear				
22.	Next you will use the Description field to limit Search Results to all ethnic groups whose description begins with a "p".				
	Click in the Description field.				
	Description				
	(begins with)				
23.	Enter the desired information into the Description field. Enter " p ".				
	(begins with)				
24.	Click the Search button.				
	Search				
25.	Notice the Search Results now contain only one item. Its description begins with a "p".				
	Click the Search Criteria link.				
	► Search Criteria				
26.	Click the Clear button to clear search criteria.				
	Clear				



Step	Action
27.	Leave all criteria fields empty.
	Click the Search button to return all results. Search
28.	Click the Search Criteria link to expand the Search Criteria section. Search Criteria
29.	Click the Show Operators link to display operators that you can use with criteria fields. Show Operators
30.	Click the begins with list. begins with



Step	Action
31.	You can use these operators in combination with criteria field to further refine search results.
	Note: "begins with" is the default operator.



Step	Action			
32.	For this example you will use the contains operator and search for all ethnic groups whose ethic group code contains a "i".			
	Click the contains list item. contains			
33.	Click in the Ethnic Group field.			
	Ethnic Group contains			
34.	Enter the desired information into the Ethnic Group field. Enter "i".			
	Ethnic Group contains			
35.	Click the Search button.			
	Search			

< My Homepage		Personal Details		2 🚩 🗏 🙆
David Smith	Cancel	Lookup		
	Search for: *Ethnic Group			
Addresses	Search Criteria			
Addresses	 Search Results 			
e Contact Details	· · · /		3 rows	
Name	Ethnic Group 🛇	Description \Diamond		
thnic Groups	AMIND	American Indian/Alaska Native		
Emergency Contacts	ASIAN	Asian		
Additional Information	DAGIE	Pacific Islander		ements for the
🛓 Disability	PACIF	Pacific Islander		, the employer s information is
Veteran Status	λ			information isions of applicable to be summarized data will not identify
				ed: peoples of Europe,
				cial groups of Africa.
				can, or other Spanish
				es of the Far East, s, for example,
				ginal peoples of community

Step	Action
36.	Notice the Search Results now display 3 items. Each contains an "i".
37.	Click the Search Criteria link. Search Criteria



Step	Action
38.	Click the Clear button.
39.	Click the begins with list. begins with
40.	Click the between list item. between

< My Homepage		Personal Details		2 🏲 🗏 🙆
David Smith	Cancel	Lookup		
	Search for: *Ethnic Group			
Addresses	 Search Criteria 		Hide Operators	
@ Contact Details	Ethnic Group	between 🔽		
*		and		
Name	Description	begins with	J	
s Ethnic Groups				
Emergency Contacts		Search Clear		
Additional Information	 Search Results 			ements for the
, Disability				s, the employer s information is information
Veteran Status				to be summarized data will not identify
				ed: peoples of Europe,
				cial groups of Africa.
				can, or other Spanish
				es of the Far East, is, for example,
				ginal peoples of community

Step	Action
41.	The between operator allows you to limit all results to items that fall between the values you enter in the two search criteria text boxes. For this example, you will not use the between operator.
42.	Click the between list.



Step	Action
43.	The in operator allows you to limit search results to items that are included in a list that you specify. Enter the list in the text field and separate each item with a comma (,). You can leave spaces between the items.
	Click the in list item.
	in
44.	For this example, you will search for all ethnic groups in the following list: AMIND and BLACK.
	Click in the Ethnic Group field.
	Ethnic Group in
45.	Enter the desired information into the Ethnic Group field. Enter "AMIND,BLACK". Ethnic Group in
46.	Click the Search button. Search
47.	Notice the Search Results now display two items: AMIND and BLACK.
	Click the Search Criteria link.
	► Search Criteria
48.	Click the Clear button.
49.	Click the Cancel button.
	Cancel
50.	End of Procedure.

Favorites

The topics in this lesson cover how to

- Create favorites from fluid and classic pages
- Navigate using favorites
- Edit favorites



Creating Favorites

This topic covers how to favorite fluid and classic pages.

Procedure

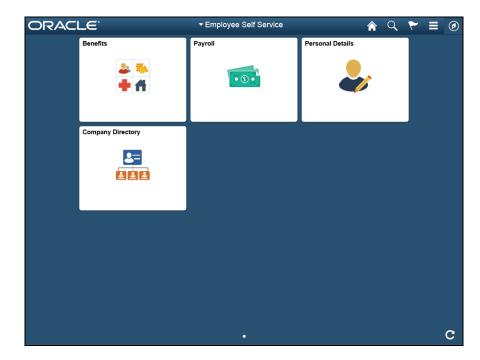
In this topic you will create three favorites for fluid and classic pages:

- -- Payroll (Fluid)
- -- Contact Details (Fluid)
- -- Benefits Summary (Classic)

ORAC	LE	▼Employee Self Service	â (Q 1	۲	∎	۲
	Benefits	Payroll	Personal Details				
	Company Directory						
						(C

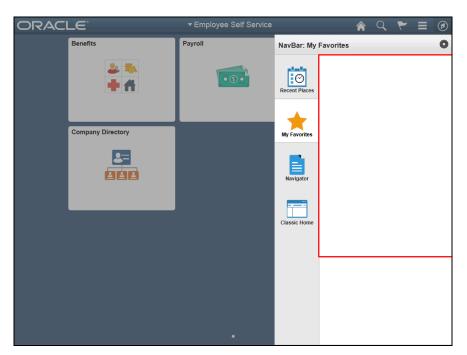
Step	Action
1.	First you will use the NavBar to review your current favorites.





Step	Action
2.	Click the NavBar button.
3.	Click the My Favorites button.
	Research Control Contr
	Chan have





Step	Action
4.	Notice, you currently do not have any favorites.
	You will begin by adding the Payroll page (a Fluid page) to your favorites.
	Use the Payroll tile to navigate to the Payroll page.
5.	Click outside the NavBar and the Tiles to close the NavBar.
6.	Click the Payroll button.
	Payroll



< My Homepage		Payroll Self Ser	vice		A 9 Y	
Jane Smith Social Casework Assistant						
Ray Checks	Pay Check	S				
🍰 Direct Deposit	T			Actio	ns	A 1
W-4 Tax Information	<u> </u>			, locito		î↓
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number / PDF Check	
Soluntary Deductions	06/23/2017	Contra Costa County	06/15/2017	\$1692.06	3304416	>
Advance Pay	06/09/2017	Contra Costa County	05/01/2017 05/31/2017	\$801.95	3295753	>
	05/25/2017	Contra Costa County	05/01/2017 05/15/2017	\$1692.06	3287823	>
	05/10/2017	Contra Costa County	04/01/2017 04/30/2017	\$801.97	3279190	>
	04/25/2017	Contra Costa County	04/01/2017 04/15/2017	\$1692.06	3271259	>
	04/10/2017	Contra Costa County	03/01/2017 03/31/2017	\$877.94	3262603	>
	03/24/2017	Contra Costa County	03/01/2017 03/15/2017	\$1692.06	3254660	>

Step	Action
7.	The Payroll pages display.
	Use the Actions icon on the banner to add this page to your favorites.
8.	Click the Actions List button.
	A < < ≡ Ø



Contra Costa County PeopleSoft Training

< My Homepage		Payroll Self Ser	vice	♠ ♥ ☴	
l ane Smith Social Casework Assistant				Add to Homepage	
🟹 Pay Checks	Pay Check	S		Add to NavBar	
🍰 Direct Deposit	T			Add to Favorites	
W-4 Tax Information DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Sign Out	
Voluntary Deductions	06/23/2017	Contra Costa County	06/15/2017	\$1692.06 3304416 >	
🚰 Advance Pay	06/09/2017	Contra Costa County	05/01/2017 05/31/2017	\$801.95 3295753 >	
	05/25/2017	Contra Costa County	05/01/2017 05/15/2017	\$1692.06 3287823 >	
	05/10/2017	Contra Costa County	04/01/2017 04/30/2017	\$801.97 3279190 >	
	04/25/2017	Contra Costa County	04/01/2017 04/15/2017	\$1692.06 3271259 >	
	04/10/2017	Contra Costa County	03/01/2017 03/31/2017	\$877.94 3262603 >	
	03/24/2017	Contra Costa County	03/01/2017 03/15/2017	\$1692.06 3254660 >	

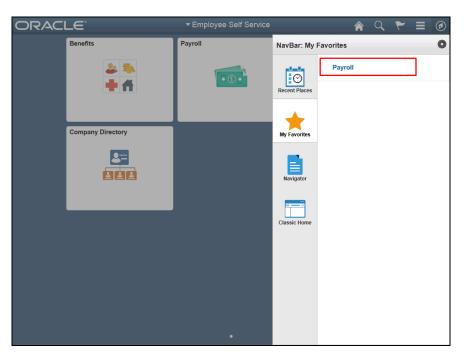
Step	Action
9.	Notice the Actions menu displays several options.For this topic you will use the Add to Favorites option.
10.	Click the Add to Favorites link. Add to Homepage Add to NavBar Add to Favorites Sign Out
11.	Click the OK button. Added 'Payroll' to Favorites



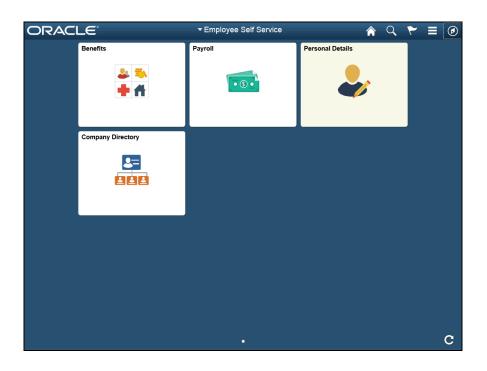
< My Homepage		Payroll Self Ser	vice			Q	۲	
Jane Smith Social Casework Assistant							_	/
👼 Pay Checks	Pay Check	s					_	
🍰 Direct Deposit	T					NavB		<u>م</u> ا
W-4 Tax Information	•							î↓
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Payc PDF	heck Ni Check	umber /	
S Voluntary Deductions	06/23/2017	Contra Costa County	06/15/2017	\$1692.06	33044	416		>
🚰 Advance Pay	06/09/2017	Contra Costa County	05/01/2017 05/31/2017	\$801.95	3295	753		>
	05/25/2017	Contra Costa County	05/01/2017 05/15/2017	\$1692.06	32878	823		>
	05/10/2017	Contra Costa County	04/01/2017 04/30/2017	\$801.97	3279	190		>
	04/25/2017	Contra Costa County	04/01/2017 04/15/2017	\$1692.06	32712	259		>
	04/10/2017	Contra Costa County	03/01/2017 03/31/2017	\$877.94	32626	603		>
	03/24/2017	Contra Costa County	03/01/2017 03/15/2017	\$1692.06	32540	660		>

Step	Action
12.	Next you will navigate back to the Employee Self Service Home Page and confirm that the Payroll page has been added to your favorites.
	Note: you could also use the NavBar on this page to navigate to your favorites.
13.	Click the Home button. \bigcirc \bigcirc \bigcirc
14.	Click the NavBar button. $\textcircled{\begin{tabular}{lllllllllllllllllllllllllllllllllll$
15.	Click the My Favorites button.





Step	Action
16.	Notice the Payroll page now displays in the My Favorites section on the NavBar .
17.	Click outside the NavBar and the Tiles to close the NavBar .





Step	Action
18.	Next you will add the Contact Details page to your favorites. This page is found under the Personal Details tile.
19.	Click the Personal Details button.
20.	Click the Contact Details link. Addresses Contact Details Addresses Contact Details Addresses Addresses Contact Details Addresses Addresses Contact Details Addresses Addresses

< My Homepage	Personal Deta	ils	Â	० ۲ 🗉	
ane Smith⊙ ocial Casework Assistant					
Addresses	Contact Details				
Name	Phone +				
🎎 Ethnic Groups	Number	Extension	Туре	Preferred	
CEMERGENCY Contacts	925/555-4444		Business	~	>
🚑 Additional Information हे Disability	925/555-1212		Mobile		>
🛃 Veteran Status	Email + Email Address		Туре	Preferred	
	Tony.Laszlo@doit.cccounty.us		Business	√ v	
	Tony.Laszlo@doit.cccounty.us		Home		>

Step	Action
21.	The Personal Details page displays. You will use the Actions menu to add this page to your favorites.

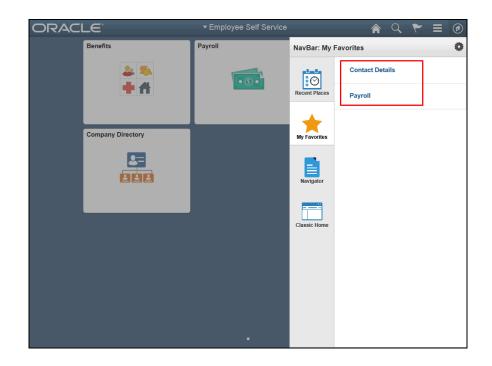


Step	Action
22.	Click the Actions List button.
	A < < ≡ Ø
23.	Click the Add to Favorites link.
	Add to Homepage
	Add to NavBar
	Add to Favorites
	Sign Out
24.	Click the OK button.
	Added 'Contact Details' to Favorites
	OK

< My Homepage	Personal Deta	ils		२ 🚩 🔳 🥝
Jane Smith Social Casework Assistant				
Maddresses	Contact Details Phone +		Na	avBar
🌉 Ethnic Groups	Number	Extension	Туре	Preferred
Contacts	925/555-4444		Business	\checkmark >
 Additional Information Disability Veteran Status 	925/555-1212 Email +		Mobile	>
	Email Address		Туре	Preferred
	Tony.Laszlo@doit.cccounty.us		Business	~
	Tony.Laszlo@doit.cccounty.us		Home	>

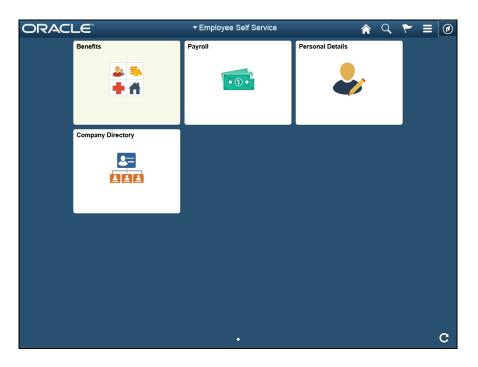


Step	Action
25.	Next you will navigate back to the Employee Self Service Home Page and confirm that the Contact Details page has been added to your favorites. Note: You could also use the NavBar on this page to navigate to your favorites.
26.	Click the Home button. \sim \sim \equiv \bigcirc
27.	Click the NavBar button. $\mathbf{R} \ \mathbf{R} \ R$
28.	Click the My Favorites button.





Step Action	
29.	Notice the Contact Details page now displays in the My Favorites section on the NavBar as well as the Payroll page you added previously.
30.	Click outside the NavBar and the Tiles to close the NavBar .



Step	Action
31.	Next you will add the Benefits Summary page (a classic page) to your favorites. This page is found under the Benefits tile.
32.	Click the Benefits object.
33.	Click the Benefits Summary link. Penefits Self Service Benefits Employee Self Service Benefits Summary Review a summary of current, past or futur enrollments.



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		All • Search	Advanced Search	Adu To 🕈
Benefits Summary				
To view your benef	es enter the date and selec	t Go.		
08/02/2017 🛐 Go				
Benefits Summary				
Type of Benefit	Plan Description	Coverage or Participation		
Non-PERS Medical	Kaiser HMO Plan A	Family		
Dental PP0	Delta Dental PPO w/KSR/HN	Family		
1V	VSP Voluntary Vision Plan	Family		
Dental HMO		Waived		
Basic Life	Basic Life 10000 ER	\$10,000		
Spouse Life		Waived		
Child Life		Waived		
Supplemental Life and ADD		Waived		
Section 457	Deferred Comp	\$75 Before Tax		
Section 457	DC150 Spec Ben	\$25 Before Tax		
Health Care Spending Account		Waived		
Flex Spending Dependent Care		Waived		
6Z		Waived		
CCC PEPRA Retirement	PEP414	3% of Earnings		

Step	Action			
34.	The Benefits Summary page displays.			
	You can add this page to your favorites in two ways:			
	Using the Favorites link on the Menu Bar Using the Add To button on the Banner			
	We will explore both in this topic.			
	First, the Favorites link			
35.	Click the Favorites button.			
	Favorites Main Menu > Self Service > Benefits > Benefits Summary			



avorites 🔻 Main Menu 🔻	> Self Service ▼ > Be	nefits 🔻 > Benefits Summary		🏫 Hor
Recently Used Benefits Summary Document Upload My System Profile Fluid Home Benefits Self Service My Favorites C Add to Favorites E Edit Favorites	Recen	All V Search	Advanced Search	Add To 👻 Not
Contact Details Payroll Payroll Non-PERS Medical	Kaiser HMO Plan A	Coverage or Participation		
Dental PP0	Delta Dental PPO w/KSR/HN			
v	VSP Voluntary Vision Plan	Family		
Dental HMO		Walved		
Basic Life	Basic Life 10000 ER	\$10,000		
Spouse Life		Waived		
Child Life		Waived		
Supplemental Life and ADD		Waived		
Section 457	Deferred Comp	\$75 Before Tax		
Section 457	DC150 Spec Ben	\$25 Before Tax		
Health Care Spending Account		Waived		
lex Spending Dependent Care		Waived		
Z		Waived		
CCC PEPRA Retirement	PEP414	3% of Earnings		

Step	Action
36.	The Favorites menu displays.
	This menu has two sections:
	Recently used: This section contains links to pages that you recently visited.
	My Favorites : This section has two links that allow you to manage your favorites Add to Favorites and Edit Favorites . It also has links to the two favorites you created in this topic.
	Editing Favorites is covered in another topic. For this topic, you will use the Add to Favorites link.
37.	Click the Add to Favorites menu.
	Recently Used Benefits Summary Document Upload My System Profile Fluid Home Benefits Setf Service Wr Favorites Contract Details Contract Details Payroil



DRACLE [:]		All V Search	Advanced Search	Add To ▼ No
Benefits Summary Jane Smith				
fo view your benefits as of anothe 08/02/2017 (해 Go	er date, enter the date and selec	zt Go.		
Benefits Summary				
Type of Benefit Non-PERS Medical	Plan Description Kaiser HMO Plan A	Coverage or Participation		
	Kaiser HMO Plan A		×	
Dental PP0	Delta Dental PPO w/KSR/HN	Add to Favorites		
IV	VSP Voluntary Vision Plan	Please Enter a Unique Description fo	r this Eavorite	
Dental HMO		*Description Benefits Summary	×	
Basic Life	Basic Life 10000 ER	OK Cancel		
Spouse Life	Busic Life 10000 Life	Waived		
Child Life		Waived		
Supplemental Life and ADD		Waived		
Section 457	Deferred Comp	\$75 Before Tax		
Section 457	DC150 Spec Ben	\$25 Before Tax		
Health Care Spending Account		Waived		
Flex Spending Dependent Care		Waived		
5Z		Waived		
		3% of Earnings		

Step	Action
38.	The Add to Favorites dialog box displays.
	You can edit the value in the Description field, if you want or you can accept the default valuethe name of the page you are adding to your favorites.
	To add the page to your favorites, click the OK button. A confirmation page will display. Click OK on that page.
	For this topic, however, you will use the second way to add the page to your favoritesusing the Add To button on the banner.
	Click Cancel to close this dialog box.
39.	Click the Cancel button.
	Add to Favorites
	Please Enter a Unique Description for this Favorite
	*Description Benefits Summary ×
	OK Cancel
40.	Click the Add To link.
40.	Chek the Adu To hilk.
	Advanced Search Add 10 - V Notificat



avorites 🔻 Main Menu 🔻	> Self Service ▼ > Be	nefits 🔻 > Benefits Summary		A Ho
ORACLE		All - Search	Advanced Search	Add To -
Benefits Summary				Homepage NavBar Favorites
Jane Smith				·
To view your benefits as of anothe	r date, enter the date and selec	t Go.		
08/02/2017 B Go]			
Benefits Summary				
Type of Benefit	Plan Description	Coverage or Participation		
Non-PERS Medical	Kaiser HMO Plan A	Family		
Dental PP0	Delta Dental PPO w/KSR/HN	Family		
1V	VSP Voluntary Vision Plan	Family		
Dental HMO		Waived		
Basic Life	Basic Life 10000 ER	\$10,000		
Spouse Life		Waived		
Child Life		Waived		
Supplemental Life and ADD		Waived		
Section 457	Deferred Comp	\$75 Before Tax		
Section 457	DC150 Spec Ben	\$25 Before Tax		
Health Care Spending Account		Waived		
Flex Spending Dependent Care		Waived		
6Z		Waived		
CCC PEPRA Retirement	PEP414	3% of Earnings		

Step	Action
41.	Add To menu displays.
	You will use the Favorites link.
42.	Click the Favorites menu.
	Add To V Homepage NavBar Favorites



avorites 🔻 Main Menu 🔻	> Self Service ▼ > Be	nefits 🔻 > Benefits Summary	🏫 Hon
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Benefits Summary			
To view your benefits as of anothe 08/02/2017 (前 Go	er date, enter the date and seled	(G0.	
Benefits Summary			
Type of Benefit	Plan Description	Coverage or Participation	
Non-PERS Medical	Kaiser HMO Plan A	×	
Dental PP0	Delta Dental PPO w/KSR/HN	Add to Favorites	
۱V	VSP Voluntary Vision Plan	Please Enter a Unique Description for this Favorite *Description Benefits Summary ×	
Dental HMO		OK Cancel	
Basic Life	Basic Life 10000 ER	Calicei	
Spouse Life		Waived	
Child Life		Waived	
Supplemental Life and ADD		Waived	
Section 457	Deferred Comp	\$75 Before Tax	
Section 457	DC150 Spec Ben	\$25 Before Tax	
Health Care Spending Account		Waived	
Flex Spending Dependent Care		Waived	
6Z		Waived	
CCC PEPRA Retirement	PEP414	3% of Earnings	

Step	Action
43.	The Add to Favorites dialog box displays. For this example, you will accept the default value in the Description field.
44.	Click the OK button. Add to Favorites Please Enter a Unique Description for this Favorite *Description Benefits Summary OK
45.	Click the OK button.



DRACLE		All - Search	Advanced Search	Add To 👻 🗸
		All • Search	Advanced Search	Notific
Benefits Summary ^{Jane Sm} Favorites				,
To view your benefits as of anothe	er date, enter the date and selec	t Go.		
08/02/2017 🛐 Go				
Benefits Summary				
Type of Benefit	Plan Description	Coverage or Participation		
Non-PERS Medical	Kaiser HMO Plan A	Family		
Dental PP0	Delta Dental PPO w/KSR/HN	Family		
1V	VSP Voluntary Vision Plan	Family		
Dental HMO		Waived		
Basic Life	Basic Life 10000 ER	\$10,000		
Spouse Life		Waived		
Child Life		Waived		
Supplemental Life and ADD		Waived		
Section 457	Deferred Comp	\$75 Before Tax		
Section 457	DC150 Spec Ben	\$25 Before Tax		
Health Care Spending Account		Waived		
Flex Spending Dependent Care		Waived		
6Z		Waived		
CCC PEPRA Retirement	PEP414	3% of Earnings		

Step	Action			
46.	Now, you will check to be sure that the page has been added to your favorites. You will start by looking at the Favorites menu.			
47.	Click the Favorites button. Favorites Main Menu Self Service Benefits Benefits			
48.	Notice, Benefits Summary now displays in the My Favorites section along with the two pages that you added previously Contact Details and Payroll .			
49.	Click outside the menu to close it.			

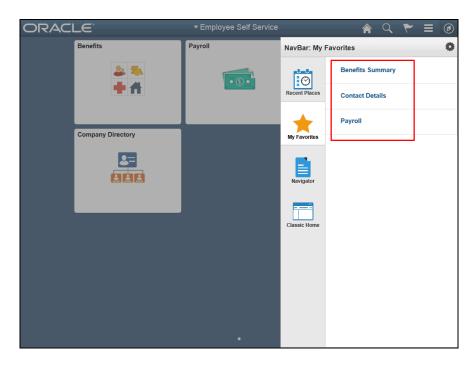


avorites 🔻 Main Menu 🔻	> Self Service ▼ > Be	enefits 🔻 > Benefits Summary		合 也
ORACLE		All - Search	Advanced Search	Add To 👻
Benefits Summary				
Jane Smith				
To view your benefits as of anoth	er date, enter the date and selec	t Go.		
08/02/2017 🛐 Go				
Benefits Summary				
Type of Benefit	Plan Description	Coverage or Participation		
Non-PERS Medical	Kaiser HMO Plan A	Family		
Dental PP0	Delta Dental PPO w/KSR/HN	Family		
1V	VSP Voluntary Vision Plan	Family		
Dental HMO		Waived		
Basic Life	Basic Life 10000 ER	\$10,000		
Spouse Life		Waived		
Child Life		Waived		
Supplemental Life and ADD		Waived		
Section 457	Deferred Comp	\$75 Before Tax		
Section 457	DC150 Spec Ben	\$25 Before Tax		
Health Care Spending Account		Waived		
Flex Spending Dependent Care		Waived		
6Z		Waived		
CCC PEPRA Retirement	PEP414	3% of Earnings		

Step	Action
50.	Now you will navigate to the Employee Self Service home to confirm that the Benefits Summary page appears on the My Favorites section on the NavBar.
	You will use the Home link on the Menu Bar .
	Note : depending on the screen resolution used on your computer, the NavBar may not be visible on your screen from a classic page.
51.	Click the Home Add To V Notifica
52.	Click the NavBar button.



Step	Action
53.	Click the My Favorites button.
	by Process
	Rengator
	Case: How



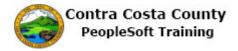
Step	Action
54.	Notice, the My Favorites section of the NavBar now lists all three of the pages that you added to your favorites.
55.	Click outside the NavBar and the Tiles to close the NavBar .
56.	
	End of Procedure.

Navigating with Favorites

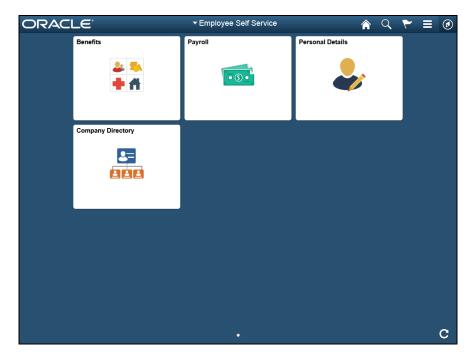
This topic covers how to use favorites to navigate.

Procedure

In this topic you will use the **My Favorites** section of the NavBar and the **Favorites** menu on a classic page to navigate to each of the favorites you created in the previous topic:



- -- Benefits Summary
- -- Contact Details
- -- Payroll



Step A	Action
	First you will use the NavBar to view your favorites and then navigate to the Benefit Summary page.



ORACI	LE	▼Employee Self Service	Â	Q	۲	=	٥
	Benefits	Payroll	Personal Details				
	Company Directory						
							C

Step	Action
2.	Click the NavBar button.
3.	Click the My Favorites button.
	Recent Places
	E Strepter
	Classe: Hanne



Contact Details Phone Name +	Bar: My Favorites
Contact Details Contact Details Phone Recent F	Benefits Summary
Number Cemergency Contacts Additional Information 925/555-1212 Pisability Veteran Status Email H Email Address Tony Laszlo@doit cccounty us Tony Laszlo@doit cccounty us	tPlaces Contact Details worities Payroll

Step	Action
4.	Notice the My Favorites section displays the three favorites you previously created. They are displayed in alphabetical order:
	Benefits Summary Contact Details Payroll
	Click on each to navigate directly to the Benefit Summary page, or the Contact Details page, or the Payroll page. You will start with Benefits Summary .
5.	Click the Benefits Summary link.
	Benefits Summary Recent Places Contact Details My Favorites Payroll



Favorites ▼ Main Menu ▼	> Self Service ▼ > Be	enefits 🔻 > Benefits Summary			Home
ORACLE [®]		All - Search	Advanced Search	Add To 👻	Notific
Benefits Summary					,
Jane Smith					
To view your benefits as of anothe	er date enter the date and selec	t Go			
08/02/2017 🛐 Go					
Benefits Summary					
Type of Benefit	Plan Description	Coverage or Participation			
Non-PERS Medical	Kaiser HMO Plan A	Family			
Dental PP0	Delta Dental PPO w/KSR/HN	Family			
1V	VSP Voluntary Vision Plan	Family			
Dental HMO		Waived			
Basic Life	Basic Life 10000 ER	\$10,000			
Spouse Life		Waived			
Child Life		Waived			
Supplemental Life and ADD		Walved			
Section 457	Deferred Comp	\$75 Before Tax			
Section 457	DC150 Spec Ben	\$25 Before Tax			
Health Care Spending Account		Waived			
Flex Spending Dependent Care		Waived			
6Z		Waived			
CCC PEPRA Retirement	PEP414	3% of Earnings			

Step	Action
6.	The Benefits Summary page displays.
	Next you will use the Favorites menu to navigate to the Contact Details page.
	You could also use the NavBar which is off screen on this screen shot. Depending on the resolution of your monitor, a classic page may resize and allow you to view the NavBar or you may have to scroll to the right to view it.
7.	Click the Favorites button.
	<u>Favorites</u> ▼ Main Menu ▼ >
	ORACLE'



avorites 🔻 Main Menu 🔻	> My Homepage > Bene			A H
Recently Used Benefits Summary		All - Search	Advanced Search	Add To 👻
Dependent/Beneficiary Inf Fluid Home Benefits Self Service My Favorites Edit Favorites Edit Favorites Benefits Summary Contact Details) Ite and select	Go.		
Payroll		Coverage or Participation		
NonPERS Medical	Kaiser HMO Plan A	Family		
Dental PP0	Delta Dental PPO w/KSR/HN	Family		
Voluntary Vision Plan	VSP Voluntary Vision Plan	Family		
Dental HMO		Waived		
Basic Life	Basic Life 10000 ER	\$10,000		
Spouse Life and AD & D		Waived		
Child Life		Waived		
Supplemental Life and AD & D		Waived		
Section 457	Deferred Comp	\$75 Before Tax		
DC Special Benefit \$25/\$150	DC150 Spec Ben	\$25 Before Tax		
Health Care Spending Account		Waived		
Dependent Care Assistance Prog		Waived		
Health Savings Account		Waived		
CCC PEPRA Retirement	PEP414	3% of Earnings		

Step	Action
8.	Notice, the My Favorites section lists the three favorites you previously added.For this example, you will view the Contact Details page next.
9.	Click the Contact Details link. My Favorites ate ar Image: Contact Details ate ar Image: Contact Details Image: Contact Details Image: Payroll Image: Contact Details
10.	Click the NavBar button.



< Benefits Summary	Personal Details		♠ < ♥ ≡ ∅
Jane Smith Social Casework Assistant		NavBar	0
Addresses	Contact Details	\odot	Contact Details
B Name	Phone +	Recent Places	Benefits Summary
Ethnic Groups	Number 925/555-4444	*	Dependent/Beneficiary Info
Additional Information	925/555-1212	My Favorites	Fluid Home
E Disability		Navigator	Benefits Self Service
	Email +		
	Email Address	Classic Home	
	Tony.Laszlo@doit.cccounty.us		

Step	Action					
11.	The Contact Details page now displays.					
	Next, you will use the NavBar to navigate to the Payroll page.					
12.	Click the My Favorites button.					
13.	Click the Payroll link. NavBar: My Favorites Benefits Summary Contact Details Payroll					



Jane Smith Social Casework Assistant						
Ray Checks	Pay Check	s				
🍰 Direct Deposit						
W-4 Tax Information	Ŧ					↑↓
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Nu PDF Check	nber /
SVoluntary Deductions	06/23/2017	Contra Costa County	06/15/2017	\$1692.06	3304416	>
👷 Advance Pay	06/09/2017	Contra Costa County	05/01/2017 05/31/2017	\$801.95	3295753	>
	05/25/2017	Contra Costa County	05/01/2017 05/15/2017	\$1692.06	3287823	>
	05/10/2017	Contra Costa County	04/01/2017 04/30/2017	\$801.97	3279190	>
	04/25/2017	Contra Costa County	04/01/2017 04/15/2017	\$1692.06	3271259	>
	04/10/2017	Contra Costa County	03/01/2017 03/31/2017	\$877.94	3262603	>
	03/24/2017	Contra Costa County	03/01/2017 03/15/2017	\$1692.06	3254660	>

Step	Action
14.	The Payroll page displays.
	You have finished using My Favorites to navigate to each of your favorites.
15.	Click the Home button.
16.	End of Procedure.

Editing Favorites on a Classic Page

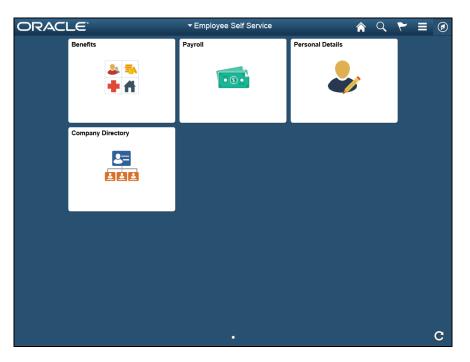
This topic covers how to edit favorites from a classic page.

Procedure

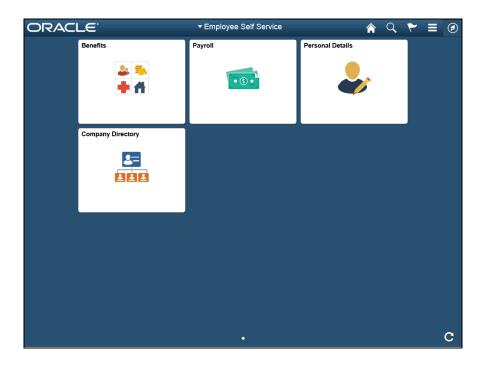
In this topic, you will edit two of the favorites you created in the previous topic.

You will rename one and delete the other.





Step	Action
1.	You will use the NavBar and then Classic Home to navigate to a classic page.





Step	Action
2.	Click the NavBar button.
3.	Click the Classic Home button.
	Classic Home

Favorites Main Menu			A	Home
	All V Search	Advanced Search	Add To 🔻	Notifica
Company Directory				
Search by Name				
Advanced Search				
<				>

Step	Action
4.	The Classic Home page displays.
	You will use the Favorites link to edit your favorites.

Training Guide



Navigation	for \$	Self	Service	Users

Favorites 🔻 Main Menu 🔻							1	Home
ORACLE [.]		All	 Search 		Advanced Searc	ı	Add To 🔻	Notifica
Company Directory	0 -							
Search by Name								
Advanced Search								
<								>

Step
5.



avorites 🔻 Main Menu 🔻			🏫 H
Recently Used Benefits Summary Document Upload My System Profile Fuld Home Benefits Self Service My Favorites Add to Favorites Edit Favorites	All V Search	Advanced Search	ايې ♦ Add To ♥ ۸
Benefits Summary Contact Details Payroll			

Step	Action
6.	The Favorites Menu displays.
	The Recently Used section displays pages you have recently visited.
	The My Favorites section has two links that allow you to Add to Favorites and Edit Favorites . In this topic you will use the Edit Favorites link.
	This section also lists your current favorites, the ones you created in the previous topic:
	Benefits Summary Contact Details Payroll



Recently Used Benefits Summary Document Upload My System Profile Fluid Home Benefits Set Service Wy Favorites Add to Favorites Edit Favorites Benefits Summary Control Details Payroll	ites 🔻 Main Menu 🔻		🏫 Hom
Add to Favorites Edit Favorites Benefits Summary Contact Details	Benefits Summary Document Upload My System Profile Fluid Home	Add To 🔻	Notifi
	y Favorites Add to Favorites Edit Favorites Benefits Summary Contact Details		

Step	Action
7.	In this topic, you will rename Payroll to Pay Check and you will delete the Contact Details favorite.
8.	Click the Edit Favorites menu. Recently Used Document Upload My System Profile Fauld Home Benefits Set Service Wy Favorites Add to Favorites Edit Favorites Benefits Summary Contact Details Payoet



Favorites 🔻 Main Menu 🔻			🏫 Home
ORACLE	All - Search	Advanced Search	Add To 👻 🦰 Notifica
	Change Display Or		Help Personalize Page 🚍
	Names	Delete	
R Save V Notity			

Step	Action
9.	The Edit Favorites page displays.
	You can use this page to:
	Change the name of a favorite (edit the value in the Favorite fieldthis is a required field.)
	Change the order in which favorites are listed (enter numbers in the Sequence number field to represent the order in which you want the favorites lists. The default order is alphabetical, in ascending order)
	Delete a Favorite (Use the minus or delete button)



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*Favorite Benefits Summary	Sequence number 0 -		
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Step	Action
10.	First, you will edit Payroll. You will change it to Pay Check.

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Step	Action	
11.	Click in the Favorite field.	
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	*Favorite Sec	quence number
	Benefits Summary	0
	Contact Details	0
	Payroll	0
12.	Enter the desired information into the Favorit	e field. Enter " Pay Check ".
	*Favorite	Sequence number
	Benefits Summary	
	Contact Details	
	Payroll	

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Step	Action
13.	Next, you will delete Contact Details .



Step	Action		
14.	Click the Delete row 2 link.		
	Click the Save button after editing or deleting favorites.		
	💌 Favorites Personalize Find 🖾 🔣 First 🕚 1-3 of 3 🕑 Last		
	*Favorite Sequence number		
	Benefits Summary 0		
	Contact Details 0 -		
	Pay Check × 0 -		
15.	Click the OK button.		
	Delete Confirmation		
	Delete current/selected rows from this page? The delete will occur when the transaction is		
	saved.		
	OK Cancel		

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Step	Action
16.	Notice the Favorites grid now contains only two favorites. Contact Details is no longer there and Pay Check rather than Payroll displays in the last row.
	Be sure to save your changes



Step	Action
17.	Click the Save button.
	Save Notify

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ay Check		0		
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Step	Action
18.	Next, you will confirm that the changes you made are reflected on the Favorites menu accessed from the Favorites link.
19.	Click the Favorites button. Favorites Main Menu CRACLE



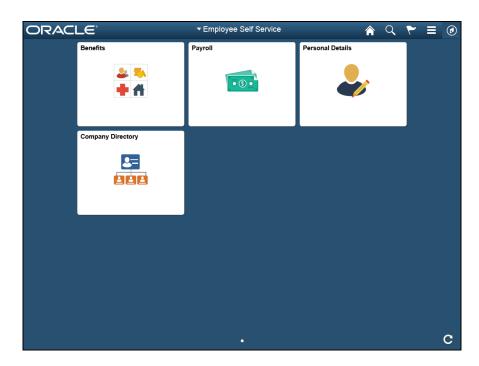
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Document Upload Hy System Profile Fluid Home Benefits Salf Service Hy Favorites Edit Favorites Benefits Summary Pay Check	s. First I 1-2 of 2 Last Sequence number 0 m 0 m		New Window Help Personalize Page 📰
Notify			

Step	Action
20.	Notice, the My Favorites section now displays two favorites:
	Benefits Summary Pay Check
	The edits you made are reflected on the menu.

Favorites V Main Menu V			合 <u>Home</u>
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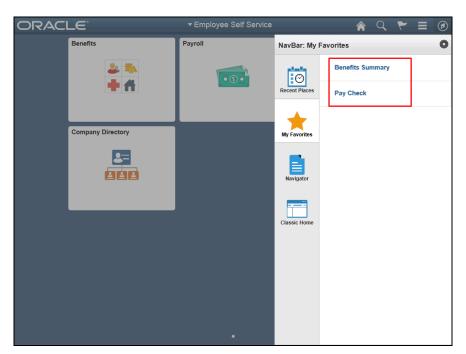


Step	Action
21.	Next you will return to the Employee Self Service Home Page and confirm that the changes you made display in the My Favorites section on the NavBar .
22.	Click the Home link. Add To Notifica









Step	Action
25.	Notice the changes you made are reflected in the My Favorites section. This section lists two favorites:
	Benefits Summary Pay Check
26.	Click outside the NavBar and the Tiles to close the NavBar .
27.	
	End of Procedure.

Editing Favorites from the NavBar

This topic covers how to edit favorites from the NavBar.

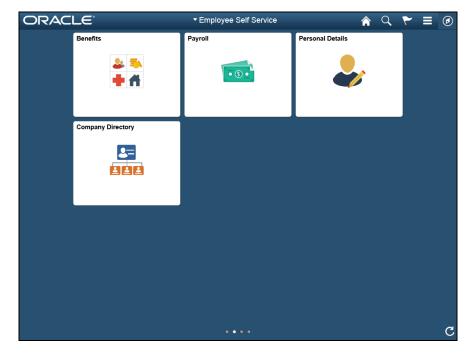
Procedure

In this topic, you will edit your favorites using the **Edit Favorites** option on the **NavBar** on Fluid pages. Editing favorites from a classic page is covered in another topic.

You will

- -- Delete a favorite
- -- Re-order the sequence in which favorites display
- -- Rename a favorite





Step	Action
1.	Click the NavBar button.
2.	Click the My Favorites button.
3.	Click the Edit Favorites menu.



			1	Home	Sign out
DRACLE			Add To 🔻	Notification	() NavBar
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dit Favorites					
Click the Save button after editing or deleting f	avaritas				
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*Favorite	Sequence number	Last			
Benefits Summary	0	-			
Contact Details	0	=			
Payroll	0				
i dyron					
Save 🕑 Notify					

Step	Action
4.	The Edit Favorites page displays. This page is a classic page.
	You will use the minus button to delete the Payroll favorite.



Step	Action
5.	Click the Delete row button. Click the Delete row button. Click the Sequence number Favorite Benefits Summary Contact Details Payroll 0
6.	Click the OK button. Delete Confirmation Delete current/selected rows from this page? The delete will occur when the transaction is saved. OK Cancel

Favorites Main Menu Main Menu	1	Home	Sign out
ORACLE	Add To 👻	Notification	() NavBar
Edit Favorites	New Window Hel	Personaliz	ə Page 📰 -
Click the Save button after editing or deleting favorites.			
Favorite Personalize Find Image: Personalize First 4 1-2 of 2 Last Favorite Benefits Sequence number 0 0 0 Contact Details 0 0 0 0			
Save Notify			



Step	Action
7.	 Noticed the Payroll favorite no longer appears. You still have two favorites: Benefits Summary and Contact Details. These display by default in alphabetical order. You will change the display order so that Contact Details displays above Benefits Summary. To do so you will change the values in the Sequence number field of each favorite. You will assign 1 to Contact Details and 2 to Benefits Summary.
8.	Click in the Sequence number field.
	Favorites Personalize Find 2 R *Favorite Sequence number Benefits Summary 0 Contact Details 0
9.	Enter the desired information into the Sequence number field. Enter "1". Click the Save button after editing or deleting favorites. Favorites Personalize Find] R First & 1-2 of 2 Last Favorite Sequence number Benefits Summary 0 - Contact Details .
10.	Click in the Sequence number field. Click the Save button after editing or deleting favorites. Favorites Personalize Find]] First 1-2 of 2 Last Favorite Sequence number Benefits Summary 0 - Contact Details 1 × -
11.	Enter the desired information into the Sequence number field. Enter "2". Edit Favorites Click the Save button after editing or deleting favorites. Favorites Personalize Find 2 3 First 1-2 of 2 Last Favorite Sequence number Benefits Summary Contact Details 1 =



Step	Action
12.	Click the Save button.
	Save Notify

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Favorite Sequence number	
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Benefits Summary 2	
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Save Notify	

Step	Action			
13.	Notice the order in which the favorites display has changed.			
	Contact Details appears at the top and Benefits Summary at the bottom.			
14.	Now you will navigate back to My Favorites on the NavBar to see the effects of these changes.			
	Click the NavBar button.			
	A Home Sign out			
	Add To 🛩 🏹 🕖 Notification NavBar			



Step	Action
15.	Click the My Favorites object.
	NavBar
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Favorites 🔻 Main Menu 🔻	😭 Home 🔰 Sign out
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Edit Favorites Click the Save button after editing or deleting favorites. Favorites Personalize Find [2] [2] First () 1-2 of 2 () Last Favorite Sequence number Contact Details 1 [] Benefits Summary 2 []	NavBar: My Favorites Image: Contact Details
Save T Notity	My Favorites My Favorites Mavigator Classic Home

Step	Action
16.	Notice the My Favorites section now displays just two favorites and Contact Details displays above Benefits Summary .



iavorites 🔻 Main Menu 🕶	A Home Sign o
DRACLE'	Add To 👻 🌾 🧭
dit Favorites	NavBar: My Favorites
Click the Save button after editing or deleting favorites.	Edit Favorites
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3enefits Summary 2	Benefits Summary
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Step	Action
17.	Next you will navigate to the Classic Home page and review how favorites display.
18.	Click the Classic Home button.



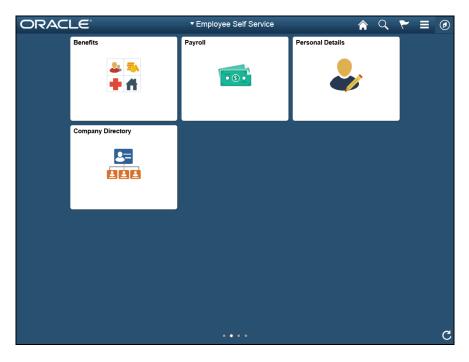
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Step	Action	
19.	Click the Favorites button.	
	Favorites Main Menu	
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Favorites V Main Menu V	A Home	Sign out
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User Profiles Dependent Information Modify a Person	Personalize Content Layout	? Help
Document Upload My Favorites Add to Favorites		
Edit Favorites Contact Details Benefits Summary		



Step	Action	
20.	Notice, only two favorites display and Contact Details displays above Benefits Summary .	
	Next you will navigate back to the Edit Favorites page using the NavBar . Then you will rename Contact Details to Email and Phone.	
21.	Click the Home link.	
	🖳 Home 🛛 Sign out	
	Add To 🗶 💌	



Step	Action
22.	Click the NavBar button.
23.	Click the My Favorites button.



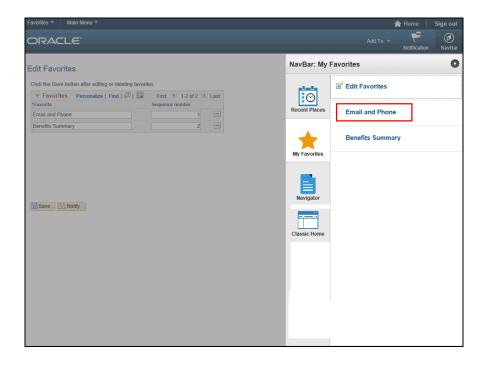
Step	Action	
24.	Click the Edit Favorites menu.	
	Edit Favorites	
	Contact Details	
	Benefits Summary	

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DRACLE		Add To 👻 🏹 Notification	Nav
		New Window Help Personalize Pa	ige
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Contact Details			
Benefits Summary	2		
n Save 🕑 Notify			

Step	Action		
25.	Click in the Favorite field. Click the Save button after editing or deleting favorites.		
	Favorites Personalize Find 🖾 🧱 First 🚯 1-2 of 2 🕑 Last		
	*Favorite Sequence number		
	Contact Details 1	-	
	Benefits Summary 2	-	



Step	Action		
26.	Enter the desired information into the Favorite field. Enter " Email and Phone ". Click the Save button after editing or deleting favorites.		
	▼ Favorites Personalize Find 🖾 🔜 First ④ 1-2 of 2 🕑 Last		
	*Favorite Sequence number		
	Benefits Summary 2		
27.	Click the Save button.		
	H Save		
28.	Click the NavBar button.		
	A Home Sign out		
	Add To 👻 🏹 😥 Notification NavBar		
29.	Click the My Favorites button.		
	Navellar		
	Ve forestes		
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Step	Action	
30.	Notice, Contact Details has been replaced by Email and Phone.	
31.	Click away from the NavBar to close it.	
32.	Click the Home link. Add To V V Notification NavBar	
33.	End of Procedure.	

Using Classic Page Elements

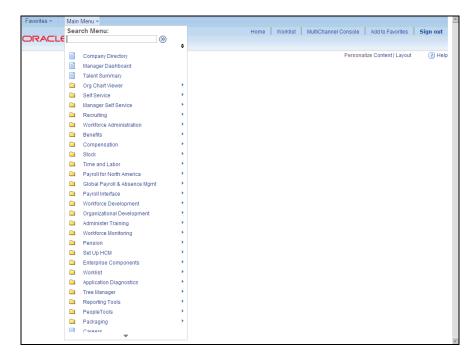
The single topic in this lesson, borrowed from Oracle pre-built training material presents an overview of common page elements found on classic pages.

Recognizing Page Controls

This topic covers the use of page controls on classic pages. The content of this topic was borrowed from Oracle's pre-built training materials.

Procedure





Step	Action	
1.	Begin by navigating to the Volunteer Activities page.	
	Click the Workforce Administration menu.	
	Workforce Administration	
2.	Click the Personal Information menu.	
	E Personal Information	
3.	Click the Biographical menu.	
	🛅 Biographical 🕨	
4.	Click the Volunteer Activities menu.	
	Volunteer Activities	
5.	Click in the Empl ID field.	
6.	Enter the desired information into the Empl ID field. Enter " KA3 ".	
7.	When the Autocomplete function is enabled (My Personalizations), the system provides a list of Empl IDs based on the text you enter in the Empl ID field.	
8.	Click the KA0003 link.	
	KA0003	



Step	Action
9.	The system enter the selected item in the field for you.
	Click the Search button.
10.	Some fields on a page are required, meaning that you must enter a value in the field before you can save the page. The asterisks next to the Volunteer Organization , Start Date , and Type of Volunteer fields indicate that these are required fields.

	Home Worklist MultiChannel Console Add to Favorites Sign
RACLE	
	New Window Help Personalize Page
olunteer Activities	
aria Cortes	Person ID KA0003
lunteer Activities	Find View All First 🕙 1 of 1 🛞 Last
*Volunteer Organization	+ -
Chapter Name	
*Start Date	End Date
*Type of Volunteer Other	Is Volunteer on Leave
Volunteer Status	
Part-time C Full-time	

Step	Action
11.	An edit box with prompt button uses a Lookup button, which looks like a magnifying glass, and can be used to look up a valid value for the field. It opens a separate page that enables you to search the database for the data you need. Click the Look up button.



	New Window Help Personalize Page
olunteer Activities	
aria Cortes	Look Up Volunteer Organization
lunteer Activities	Help
*Volunteer Organization	Volunteer Organization: begins with
	Description: begins with 💌
Chapter Name	
*Start Date	Look Up Clear Cancel Basic Lookup
*Type of Volunteer Other	Search Results
Volunteer Status	View 100 First 🕢 1-7 of 7 🕟 Last
Part-time C Full-time	Volunteer Organization Description
o Part-unie o Pait-unie	CCS Canadian Cancer Society
	KU1 American Cancer Society KU2 Hospital Auxilliary
Save 💽 Return to Search 🖃 Notify	KU3 Peace Corps
Gave By Heldin to bearen [2] Holiny	KU4 United Way
	KU5 Salvation Army
	LMW Make a Wish Foundation

Step	Action
12.	A modal prompt is a child window that requires you to interact with it before you can return to operating the parent application. An example of this is the Look Up page.
	The Look Up page displays a list of all the valid values for the field. In this example, the page displays a list of all the volunteer organizations in the database.
	Choose the Make a Wish Foundation in the table.
	Click the Make a Wish Foundation link.
	Make a Wish Foundation
13.	After you select a value, the system automatically returns you to the original page and inserts the information in the field.
14.	An edit box is a rectangular box into which you enter data. The number of characters you can enter is determined by the length of the database field.
15.	Click in the Chapter Name field.
16.	For this example, you need to add the chapter name for the organization.
	Enter the desired information into the Chapter Name field. Enter " Belmont County ".



Step	Action
17.	When entering information in a date field, you can use the date prompt button. Clicking the button opens a small calendar that displays the current month and day. Alternatively, you can press Alt+5 while in a date prompt field to open the calendar. You may also enter the current day's date by typing the word "today" in a date field. When you exit the field, the system converts the word "today" to the current date in correct date format.
18.	Click the Choose Date button.
19.	For this exercise, you want to enter a start date of July 2, 2013 . Click the Month list. June
20.	Click the July list item. July
21.	Click the 2 list item.
22.	Notice that when you selected the day, the system exited the calendar, and entered and formatted the date that you selected.
23.	A list box is a field similar to an edit box, but with a down arrow within the box. Click the down arrow to display a list of values from which you can select a single option.
24.	For this example, the type of volunteer work is administrative. Click the Type of Volunteer list.
25.	Click the Administrative list item. Administrative
26.	 A check box is a small square box that turns an option on or off. Select the box to add a check mark and the option is on. Remove the check and the option is off. In this example, the Is Volunteer on Leave check box option is off and you want to turn it on. Click the Is Volunteer on Leave option.



Step	Action
27.	A radio button is a small round button that represents one option in a group of mutually exclusive options. Only one radio button in a group can be selected at one time.
	For this example, you want to change the volunteer status to full-time.
	Click the Full-time option.
28.	Click the Save button.
29.	You successfully used several page controls to update a record in a PeopleSoft application. You have not yet used a long edit box .
	Navigate to the General Comments page, for example, to see a long edit box. In the navigation path at the top of the page, find the name of the desired menu and click to display the cascade.
	Click the Biographical link.
	Biographical 👻
30.	Click the General Comments menu.
	General Comments
31.	A Comment is a field into which you enter lengthy custom text, such as comments. These boxes store free-form text.
	Notice that when the edit box is empty, no scroll bar appears.
32.	When you enter more lines than can be displayed at the same time in the default size of the box, the system adds a vertical scroll bar and allows you to continue entering text. Use the scroll bar to move through the text.
33.	You have successfully used data entry fields that provide you with a simple way to enter and update data in your tables. End of Procedure.