PeopleSoft HCM

Navigation

Reference Guide

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Introduction

PeopleSoft HCM is used by faculty and staff to view and update personal data as well as by departments. For example, Human Resources and Payroll use PeopleSoft HCM to enter job data and the Provost's Budget Office can access faculty contracts. With the upgrade to PeopleSoft, you will see enhancements to the user experience with an updated, simplified, and contemporary user interface. The fluid user interface allows seamless movement between different devices that are adaptive and responsive in nature as well as accessible. This self-help document will step through these enhancements with topics including, logging in, overview of environment, navigation using the tiles and the navigator, creating favorites and more.

Note: This self-help document is a macro view of the environment but does not necessarily address specific tasks performed. Frequently used tasks will be used as examples, however.

Logging In and Overview of Environment

1. From your favorite browser, type **towson.edu** and press ENTER.

Note: TU Online Services is not supported by Internet Explorer.

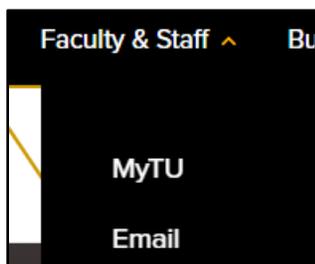2. In the top navigation, click **Faculty & Staff** and then **MyTU**.

Figure 1

Note: Alternatively, you could type **towson.edu/mytu** in the address bar and skip steps 1 and 2.

3. Click the **PeopleSoft HCM** tile.

Figure 2

4. You may be prompted to enter your **Username (NetID)** and **Password** and click **Login**.

Note: You may have to authenticate through Duo.

5. You will enter **My Homepage** and will see the Personal Data Summary tile. You **may** also see a Classic Home tile (though this may be temporary).

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Overview of the Environment

Figure 3

NUMBER	TITLE	DESCRIPTION
1	Homepage Drop-Down Menu	By default, you will see My Homepage. The Departmental Homepages that you have access to appear here as well. Click the down arrow to move between Homepages.
2	Tiles	Shortcut to most frequently used commands for whichever departmental homepage is chosen.
3	Home	Returns you to the main web page (starting point on the site).
4	Actions Menu	From this menu, you can open a new window, revise your preferences or Sign Out.
5	Navigator	Reveals a menu where you can return to recent places, go to your favorites or open the Navigator.

Switching Homepages

The default view is to see **My Homepage**. However, if you are in Human Resources, Payroll, or the Provost's Office, you may switch to a departmental homepage.

1. Click on the **Homepage drop-down arrow** to see other departmental homepages that you have access to. In this example, an employee from HR will see the Human Resources Homepage.
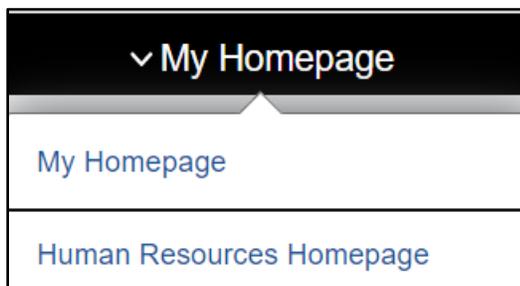

Figure 4

2. Click on the desired **Homepage** and the tiles will reflect your permission level.
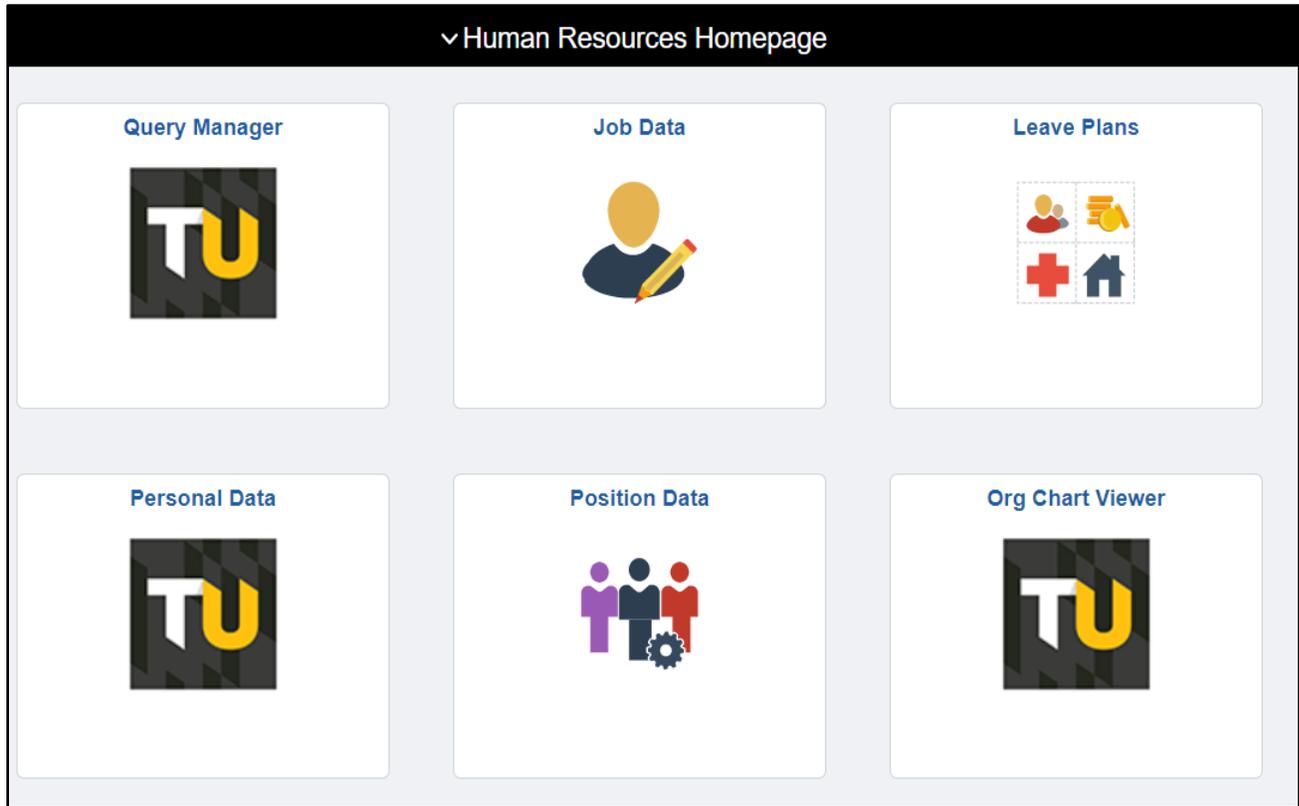

Figure 5

Navigation

There are 2 main ways to navigate the new Peoplesoft HCM environment: using the tiles or using the navigator. The **Tiles** reflect those tasks that are most frequently used and provide a shortcut. The **Navigator** mimics previous versions and is menu driven. Additional ways to navigate are also covered in this section including **Recent Places** and **My Favorites**.

Using Tiles

Depending on the whether you are looking at My Homepage or a Department Homepage, you will see a variety of tiles. These tiles reflect the most frequently used functions. Examples include but are not limited to:

- **My Homepage**
  - Personal Data Summary
- **Human Resources Homepage**
  - Query Manager
  - Job Data
  - Org Chart Viewer

- **Payroll Homepage**
  - Query Manager
  - Timesheet Administration
  - Payroll Processing

My Homepage Personal Data Summary Tile

1. Click on a tile. In this example, we will be using the **My Homepage** tile as an example and will choose the **Personal Data Summary** tile.

Figure 6

2. You will see a variety of personal information. Note that some of the categories of information can be updated by the user. If there is a **Change.....** button under a category, you may be able to click on it and make changes.

Figure 7

Note: Move down to **Employee Information** and note the **Workday Benefits ID**.

Figure 8

3. Click the **Home** icon to return to **My Homepage**

Figure 9

Using the Navigator

If you have used a previous version of PeopleSoft HCM, the Navigator will allow you to navigator through a series of menus to reach your destination in a similar manner. If you had the navigation steps memorized, the good news is - the steps are same. The biggest difference is the Navigator is now on the right and the menu options are larger and easier to maneuver through. Please note, you may not be able to perform all task using the tiles – so this is another reason to use the Navigator.

1. In this example, we will look at our compensation history. Click the **NavBar** icon in the upper right-hand corner of the window.

Figure 10

2. Click the **Navigator** icon. The **Navigator** will expand with the menu options available depending on your access level.
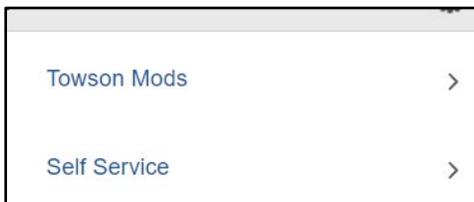
3. Click **Self Service**.

Figure 11

4. Click **Payroll and Compensation**. Notice as you navigate, you can click the **Back** arrow to return to the previous menu. You can also click the **Back to Route** button located on the right-hand side of the Navigator menu.

Figure 12

5. Click **Compensation History**.

Figure 13

6. The **Compensation History** page will appear.

Figure 14

4. Click the **Home** icon to return to **My Homepage**

Figure 15

Additional Navigation Techniques

Recent Places

Recent Places will save the last 10 places you have visited.

1. Click the **NavBar** icon in the upper right-hand corner of the window.
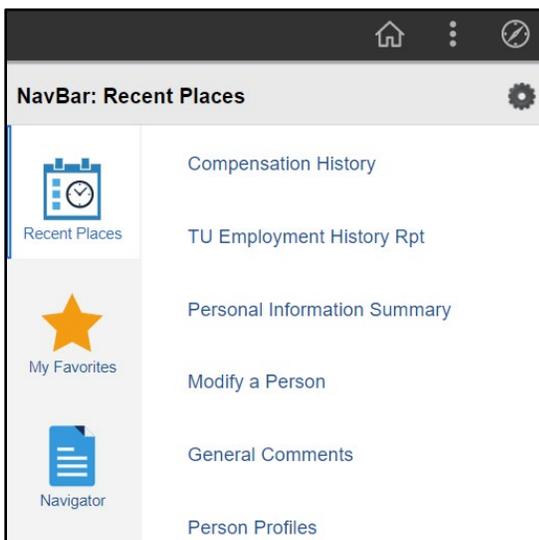
2. Click **Recent Places.**

Figure 16

3. Click on one of the 10 last places you navigated to, and you will return there.

My Favorites

If you have certain tasks you perform on a regular basis, you may add them to My Favorites in the Nav Bar. This way, you can quickly return to them in a couple easy steps. Please note that your current favorites will be imported into the new system.

1. Navigate to the place you wish to add to My Favorites (using the Navigator or the Tiles).

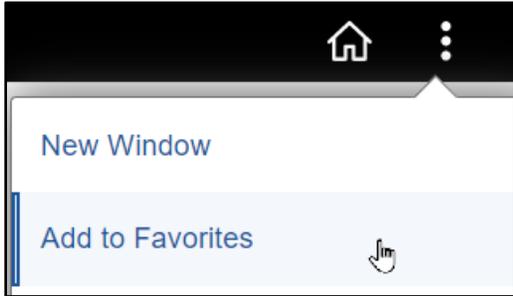2. Click the **Actions** icon and then click **Add to Favorites**.

Figure 17

3. The **Add to Favorites** dialog box will appear. You can keep the label provided or type your own more meaningful label. Click **Add**.
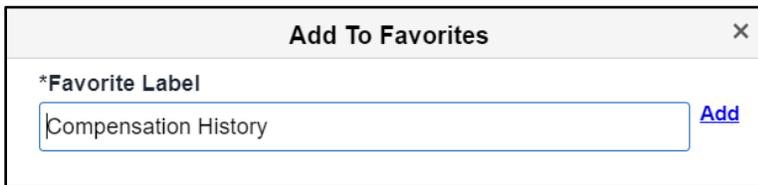

Figure 18

4. A **Message** box will confirm the addition. Click **OK**.

Figure 19

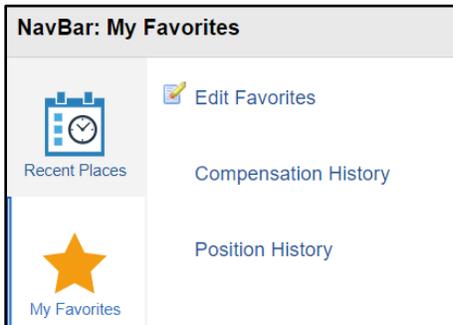5. Click the **NavBar** and then click **My Favorites** to locate your favorites.

Figure 20

Opening a New Window

You may open a new browser window so you can navigate anywhere without disturbing the original page you are on. You can open as many windows as needed. There are 2 ways to open a New Window, depending on your location within the system.

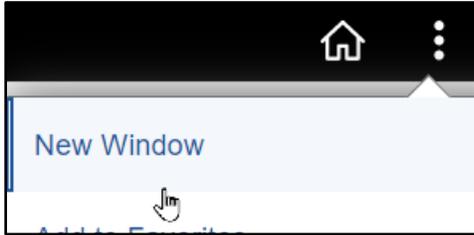1. Click the **Actions Menu** icon and then click **New Window.**

Figure 21

OR
Click the **New Window** link located in the upper right-hand corner of the window.

Figure 22

2. A new browser tab will open. Use a tile or the Navigator to reach your desired destination. Notice the tabs will reflect the destination in each window.

Figure 23

Logging Out

1. Click the **Actions** icon in the upper right-hand corner of the window.
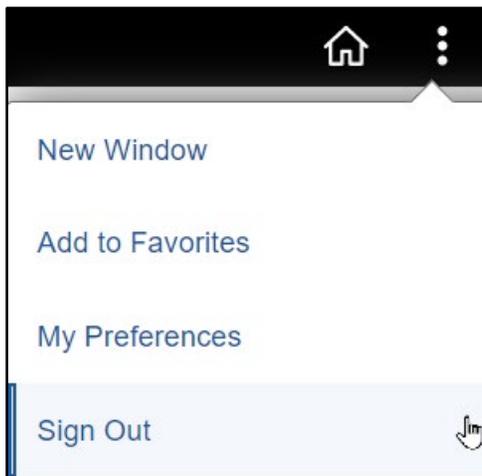
2. Click **Sign Out**.

Figure 24

Note: If you have more than one window open, you must Sign Out of all windows.