

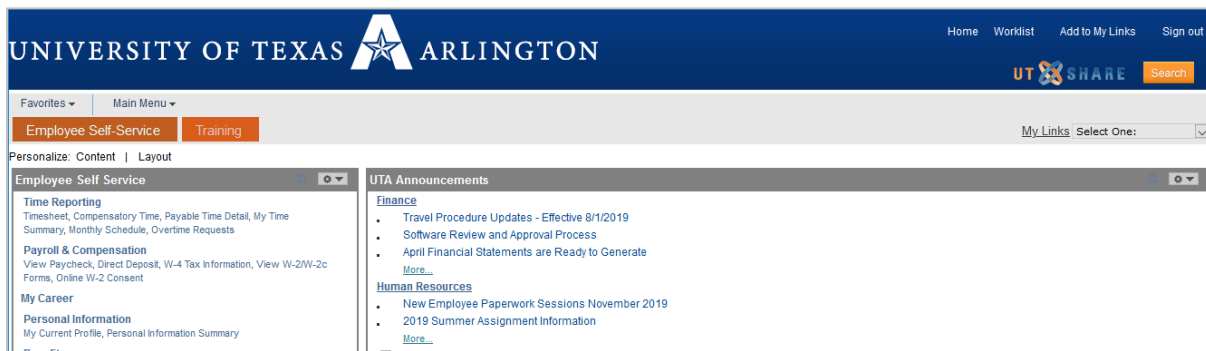
## UTShare Fluid Navigation Job Aid

In December 2019, UTShare is being upgraded to include Fluid Navigation. This upgrade will change the way users navigate to screens inside UTShare.

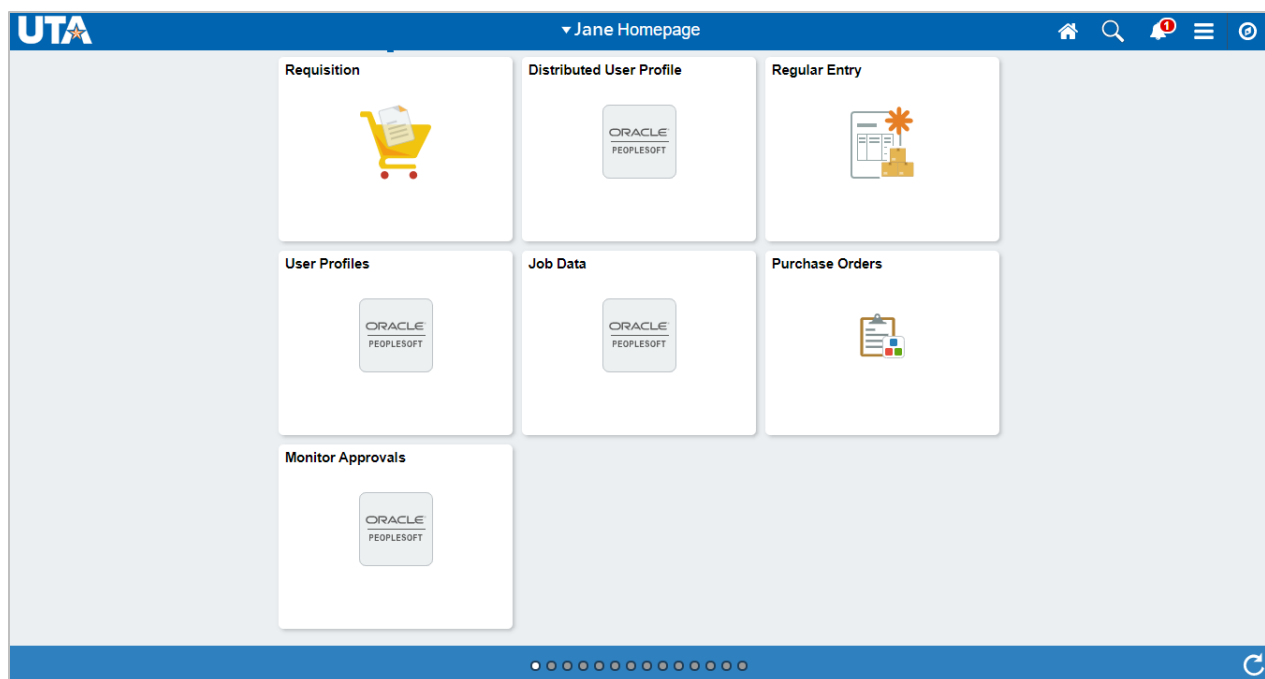
### UTShare Homepage

Currently, when a user logs into UTShare, it opens on a page that contains various pagelets and links to Favorites and Menus. UTShare Fluid will open to a user's designated Homepage. (How to designate the Homepage UTShare opens to will be discussed in a later section). On this Homepage are various tiles that can be used to navigate to screens or landing pages.

### CURRENT HOMEPAGE



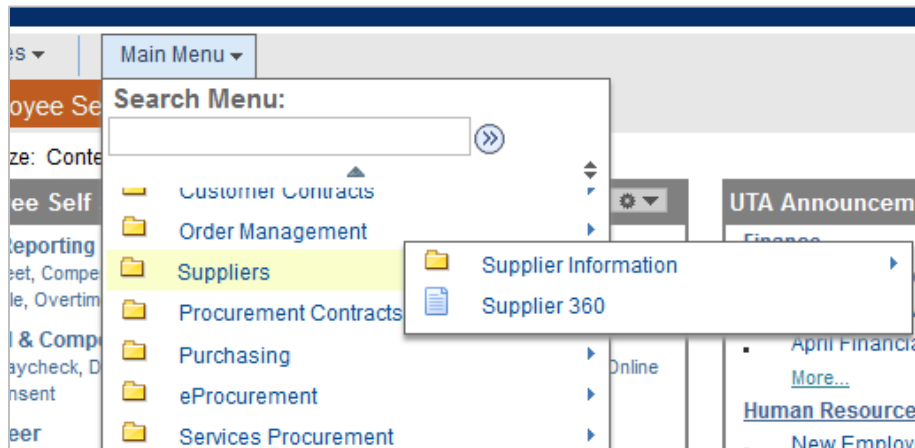
### FLUID HOMEPAGE



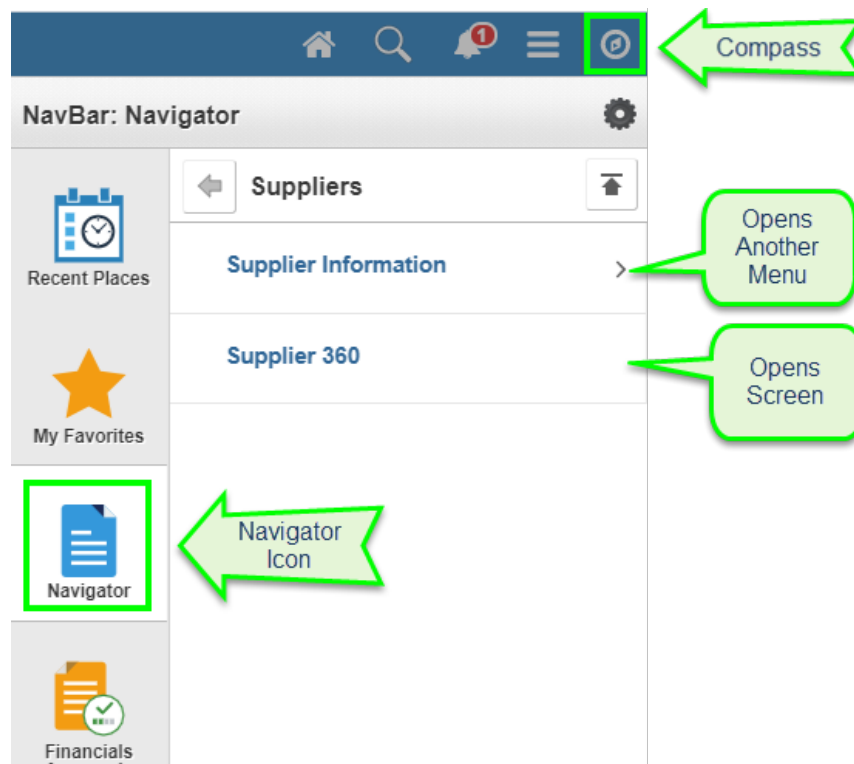
## Menu Navigation

Currently, when a user need to navigate to a screen, they use the Main Menu option found on the homepage. This will open the menu pathways and screens to which the user has security access. UTShare Fluid navigation uses the Navigator icon in the NavBar to open these menus and pathways. The NavBar is found under the compass icon at the top right of the UTShare page. In the Navigator, menu options with an arrow will open another menu; options that do not have the arrow will open to the screen. At this time, users cannot alphabetize their Navigator menu.

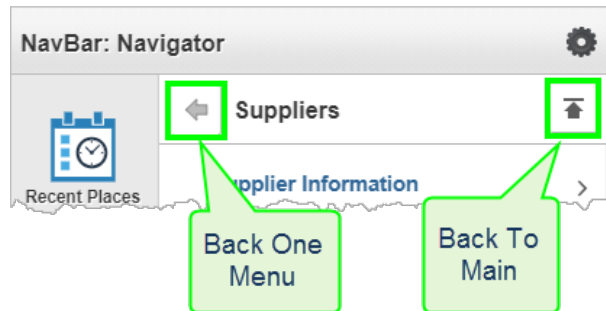
### CURRENT MENU NAVIGATION



### FLUID MENU NAVIGATION



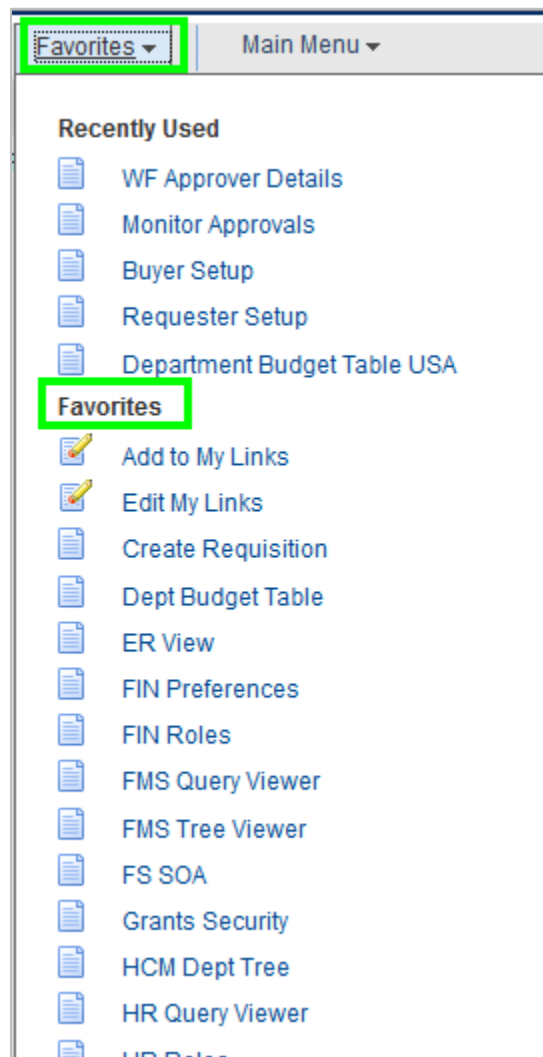
There are two arrows at the top of the Navigator. The arrow pointing to the left will go back one menu level. The arrow pointing up will go back to the first, main menu.



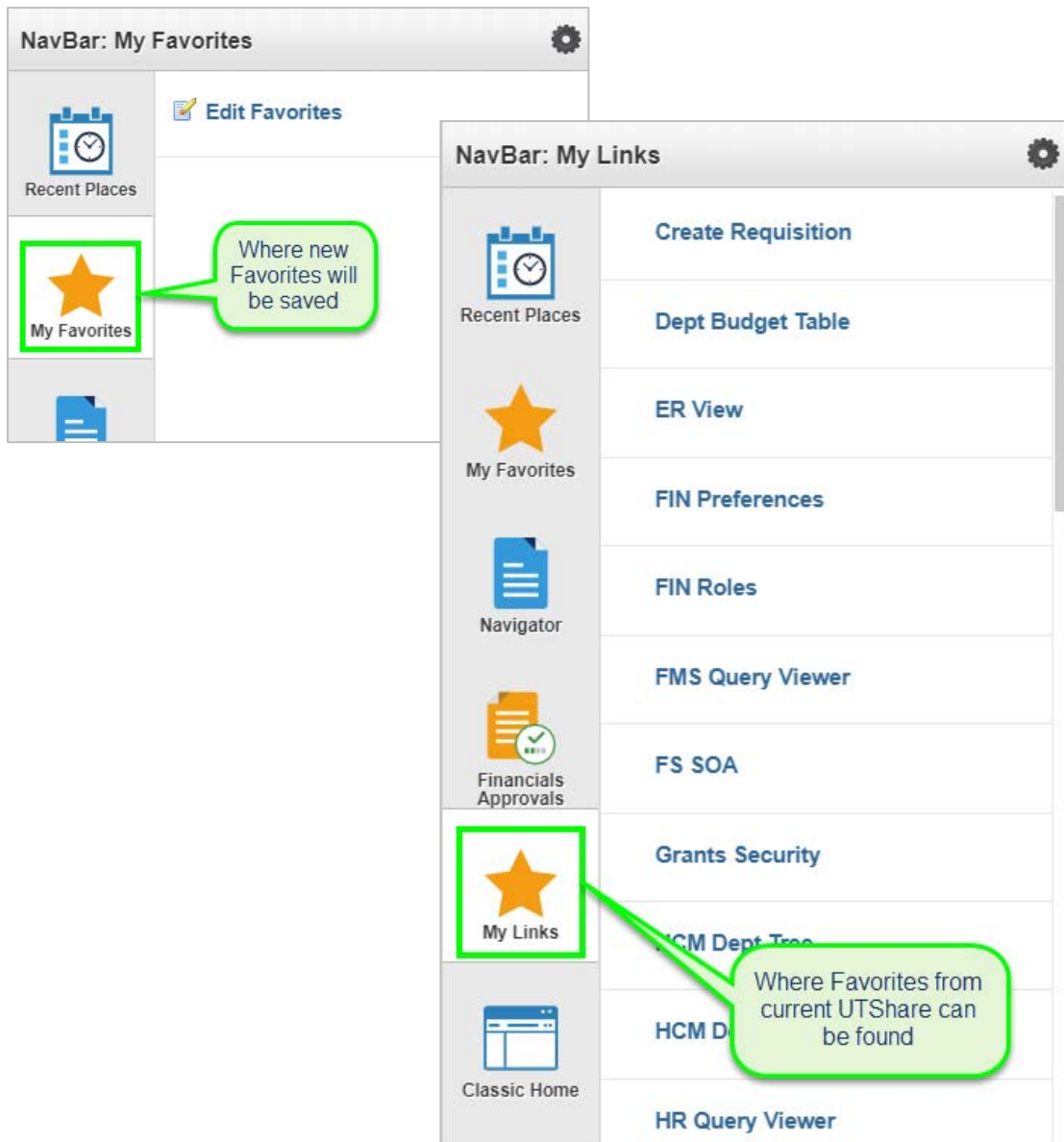
## Favorites List

Users who have saved screens as “Favorites” currently in UTShare will see these in “My Links” in Fluid. There is a “My Favorites” icon in the Fluid NavBar and any new favorites will be added to that area, however, Favorites from the current UTShare will be carried over into the My Links area.

### CURRENT FAVORITES LIST



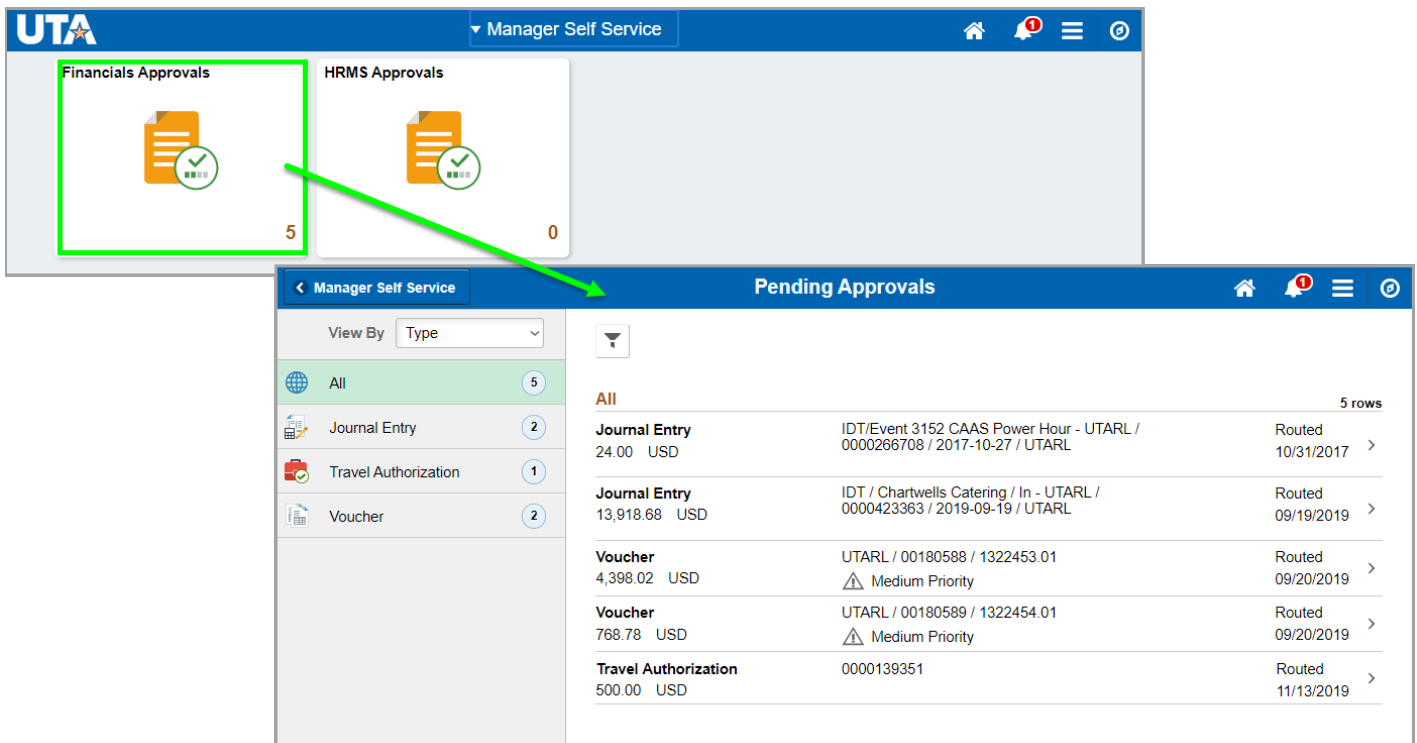
## FLUID FAVORITES LIST



### Approvals Pages

Currently, approvers navigate to their Worklist to approve Finance documents. In Fluid Navigation, approvers will need to use the Finance Approvals tile found on most Finance homepages and on the Manager Self Service homepage. This tile will also provide the number of documents pending approval.

Please note that the HRMS Approval tile does not work to approve eForms. eForms will need to be approved by navigating to the eForm and approving it on the document.

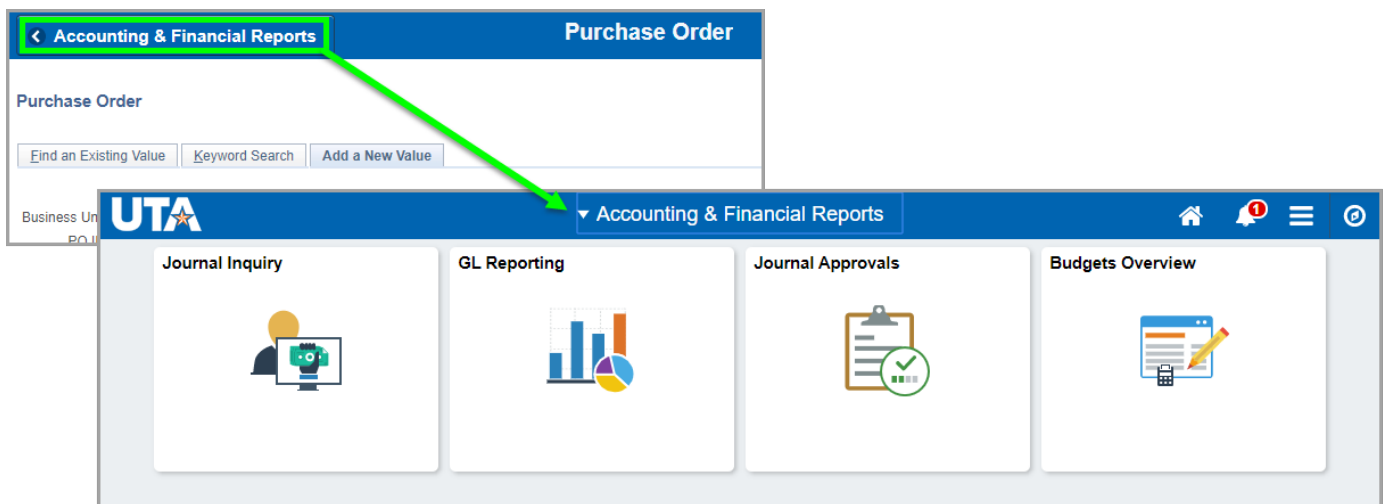


The screenshot shows the 'Manager Self Service' interface. At the top, there are two cards: 'Financials Approvals' with a count of 5 and 'HRMS Approvals' with a count of 0. A green box highlights the 'Financials Approvals' card, and a green arrow points from it to the 'Pending Approvals' section below. The 'Pending Approvals' section has a 'View By' dropdown set to 'Type' and a list of items:

| All                                       |   |        | 5 rows       |
|---|---|--------|--------------|
| <b>Journal Entry</b><br>24.00 USD         | IDT/Event 3152 CAAS Power Hour - UTARL /<br>0000266708 / 2017-10-27 / UTARL | Routed | 10/31/2017 > |
| <b>Journal Entry</b><br>13,918.68 USD     | IDT / Chartwells Catering / In - UTARL /<br>0000423363 / 2019-09-19 / UTARL | Routed | 09/19/2019 > |
| <b>Voucher</b><br>4,398.02 USD            | UTARL / 00180588 / 1322453.01<br>⚠ Medium Priority                          | Routed | 09/20/2019 > |
| <b>Voucher</b><br>768.78 USD              | UTARL / 00180589 / 1322454.01<br>⚠ Medium Priority                          | Routed | 09/20/2019 > |
| <b>Travel Authorization</b><br>500.00 USD | 0000139351  | Routed | 11/13/2019 > |

## Back Button

When navigating to a screen, there will be a back button at the left in the top blue banner. This back button will go back to the most recently used homepage.



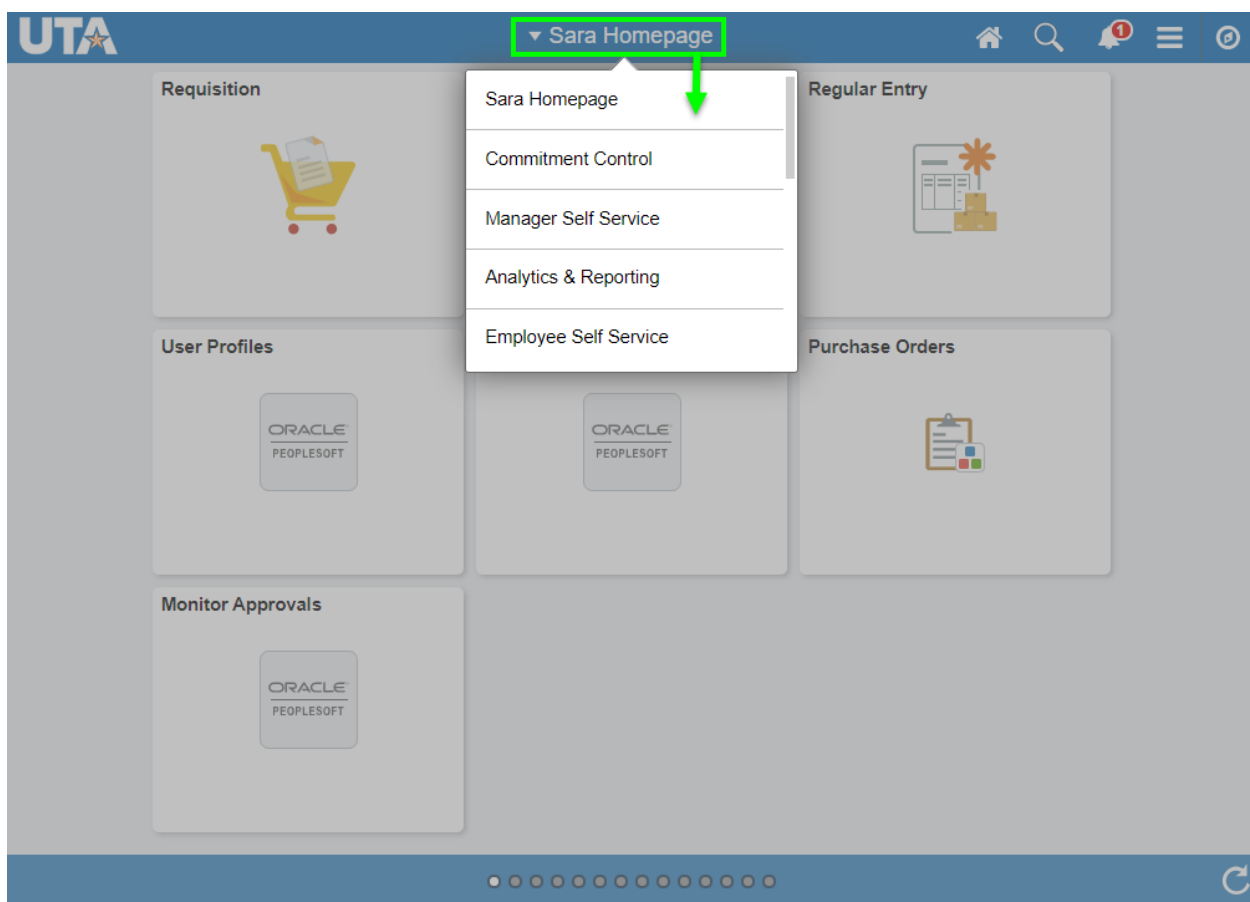
The screenshot shows the 'Accounting & Financial Reports' interface. The top blue banner has a back button (left arrow) and the text 'Accounting & Financial Reports'. A green box highlights the back button, and a green arrow points from it to the 'Purchase Order' screen above. The 'Purchase Order' screen has a search bar with 'Find an Existing Value', 'Keyword Search', and 'Add a New Value' buttons. Below the banner, there are four main sections: 'Journal Inquiry', 'GL Reporting', 'Journal Approvals', and 'Budgets Overview'.

## New Features

### Fluid Homepages

A new feature coming with Fluid is the use of Homepages to navigate to screens. Users will have various Homepages, depending on their security, that will help them to navigate to screens quickly. Fluid also comes with the ability to modify which homepage opens upon login and to customize your own personal homepage.

A list of the homepages available can be found in the drop down menu in the middle of the top blue banner. These homepages are dependent upon user security; you will only see the homepages for which you have been granted access.

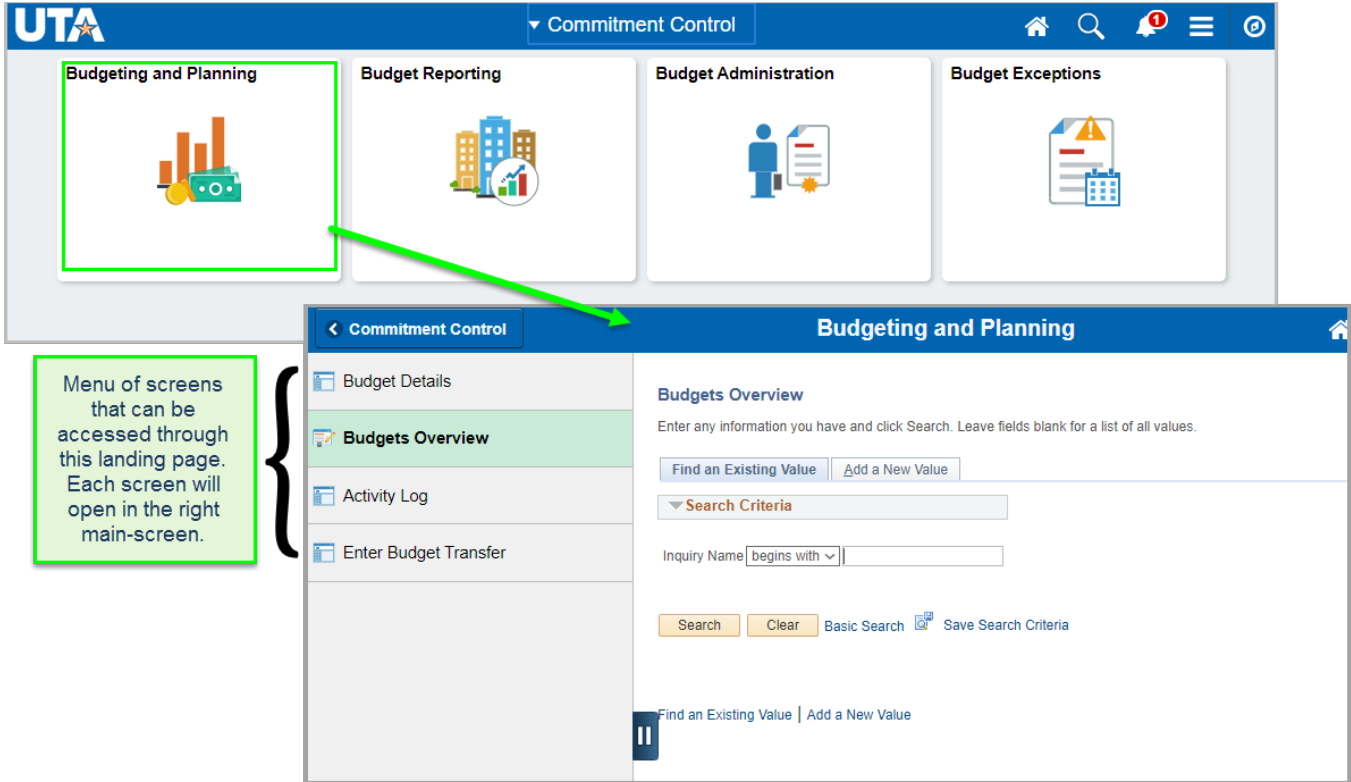


On each homepage are tiles associated with the homepage topic. Some tiles will open a specific screen, others will open a Landing Page. Landing pages provide a work center of-sorts where multiple screens can be accessed from the one screen. Further details regarding landing pages will follow.

Users can navigate to screens using either the Homepages or by using the Navigator.

## Landing Pages

Landing pages are a collection of screens and or tasks related to one topic. Users can navigate between the different screens and tasks from the landing page.



The screenshot displays the UTA Commitment Control interface. At the top, there is a navigation bar with the UTA logo, a dropdown menu for 'Commitment Control', and utility icons for home, search, notifications, and settings. Below the navigation bar, there are four main menu items: 'Budgeting and Planning', 'Budget Reporting', 'Budget Administration', and 'Budget Exceptions'. The 'Budgeting and Planning' item is highlighted with a green border and a green arrow pointing to the detailed view below.

The detailed view for 'Budgeting and Planning' shows a sidebar menu on the left with the following items: 'Budget Details', 'Budgets Overview' (highlighted in green), 'Activity Log', and 'Enter Budget Transfer'. The main content area is titled 'Budgets Overview' and contains a search interface. It includes a text input field for 'Search Criteria', a dropdown menu for 'Inquiry Name' with a 'begins with' filter, and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. At the bottom of the main content area, there are links for 'Find an Existing Value' and 'Add a New Value'.

A green box on the left side of the detailed view contains the following text: "Menu of screens that can be accessed through this landing page. Each screen will open in the right main-screen." A large curly bracket is positioned to the right of this text, encompassing the sidebar menu items.