PeopleSoft Financials introduced a new Fluid user interface in Release 5.30. PeopleSoft fluid pages are designed to scale gracefully from large screen devices, such as laptops and desktops, to the reduced viewing space of tablets and smartphones. Each user will see the new fluid interface upon logging into PeopleSoft Financials.

This job aid is designed to instruct approvers on how to access their worklist to approve both expense reports and requisitions.

Approvers will utilize the traditional, “classic view” for accessing their worklist. To access the “classic view” navigation menu, click on the Compass icon. Next click on the Navigator icon. The traditional PeopleSoft menu will be available. You can then select the Worklist link to access the approval worklist. Both expense reports and requisitions will be available for approval.

It is recommended that approvers add the Worklist link to their “My Favorites” page in order to make finding and accessing it easier.