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Campus collaboration and learning fostered a fluid transition for Finance System [1]

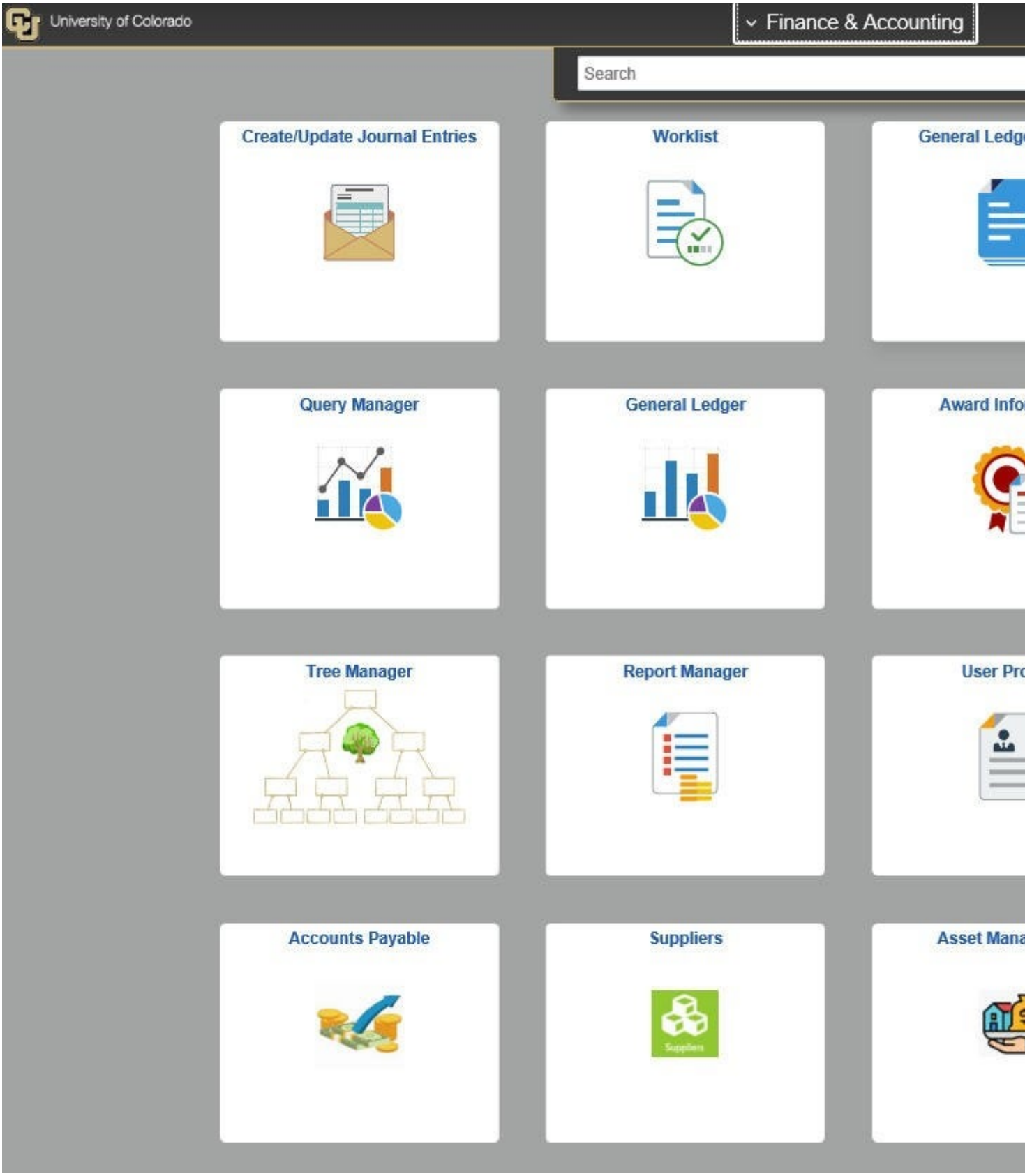
May 27, 2021 by UIS Communications [2]

The Finance System (FIN) was updated February 2021 to PeopleSoft's Fluid, a modernized and easy to use design.

As part of the annual updates to the FIN system, UIS was upgrading to the next version of PeopleTools in October 2020, with only Fluid navigation being supported in the latest version and future fluid-only functionalities. This prompted UIS and the University Controller's Office to begin implementing fluid for the FIN system and taking advantage of the fluid-only functionality, resulting in a collaboration and rollout with minimal disruption to around 3,000 end users, both inquiry and transactional users.

What is Fluid?

When a University of Colorado employee logs into the employee portal, campus portal, HCM and now FIN, they are accessing a Fluid environment. This tile-based user experience organizes navigational tools into a streamlined view that renders well on a variety of devices and screen sizes. In addition, users can navigate using the NavBar, tiles and search functionalities.



Planning and education

Project teams sought continuous feedback from end-users and provided educational resources to ensure a smooth transition.

The UIS Grants Management team and the Controller’s Office met with functional owners and

finance system users on all four campuses and surveyed users to design the new navigation, test the fluid structure, and offer help via training and assistance during the transition.

Campus feedback spurred the teams to transfer a user's favorites, meaning users did not have to resave their most used items after the update. The Controller's Office provided interactive online tools to let users explore the new FIN system and a virtual webinar to walk through the new changes.

"We can truly thank the development team at UIS for reacting to any changes we had, and for learning the new technology for this update. This was all new that they had to work with, and they were able to get the job done. The rollout was successful with no extra burden on the FinPro Help Desk," said Calvin Anderson, Director of Financial and Reporting Systems at the Controller's Office.

The FIN system will continue to be updated with essential PeopleSoft updates, but end-users can feel confident in completing their day-to-day tasks using fluid navigation.

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