Published on *University of Colorado* (https://www.cu.edu)

Fluid Personalization [1]

With Fluid, you can Personalize some of your screens in the Finance System to help you do your job more effectively.

How-to Video

Read the procedures

Log in to your campus portal and click on the Finance tile. You'll open a default homepage with a collection of tiles based on your profile. If you want, you can:

- change your tiles
- change your default homepage
- or even design a brand-new homepage

To rearrange tiles on a homepage

On the homepage you want to change, just click and drag the tiles so they're in the order you want.

To delete tiles from a homepage

On the homepage you want to change, click the Actions icon – the 3 vertical dots – and select Personalize Homepage.

On the Personalize Homepage screen: You can delete a tile if it has a red circle with an X. Or – you can just move it to the bottom of the page, so it's out of your way.

If you want to keep the changes you've made, click Save. Otherwise, click Cancel.

To add tiles to a homepage

On the Personalize Homepage screen: Click the Add Tile button. In the pop-up box, select CU Tiles. Now, either scroll to find the tile you want, or type a keyword in the search field.

Select the tile you want – it'll be added to the bottom of the homepage.

If you want to keep the changes you've made, click Save. Otherwise, click Cancel.

To copy or move tiles from one homepage to another

Go to the homepage you want to copy from and click the Actions icon. Select Personalize Homepage.

On the Personalize Homepage screen: Go to the tile you want to copy and click the pencil and paper icon. Click Copy To and then the desired homepage.

If you want to keep the changes you've made, click Save. Otherwise, click Cancel.

To change your default homepage

On any homepage, click the Actions icon and then select Personalize Homepage.

On the Personalize Homepage screen: In the left column, click the homepage you want to be your default and move it to the top of the list.

Click Save.

Now, this will be your default homepage when you log in to FIN. If you're on another homepage, you can just click the Home icon to go straight to your default homepage.

To design a brand-new homepage

On any homepage, click the Actions icon and then select Personalize Homepage.

On the Personalize Homepage screen: Click Add Homepage

In the pop-up box, the name will default to My Homepage. If you like, you can give it another name. Click Add.

Now you have a new blank homepage.

You can copy tiles from any other homepage (see above). Or you can add tiles using the CU Tiles list …

Click Save to save your new homepage.

Have a question or feedback?

Questions & Feedback [2]

Feedback or Question *

Your Email Address

CAPTCHA

This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Submit

Groups audience:
Controller
Right Sidebar:
OUC - Fin Fluid Resources

Source URL:https://www.cu.edu/controller/fluid-navigation-finance-system/fluid-personalization

Links
[1] https://www.cu.edu/controller/fluid-navigation-finance-system/fluid-personalization
[2] https://www.cu.edu/controller/forms/questions-feedback-1