PeopleSoft 9.2 Workcenters

Q: What is a Workcenter and what can it be used for?

Workcenters help frequent users of the system by dramatically boosting productivity consolidating user tasks, exceptions, alerts, links, reports, and queries into a single, secure, role-based, command center that can be personalized. Workcenters primarily help the end-user by reducing navigation time and focus on what needs to get done by reducing the time used when navigating through windows.

- Click Departmental WorkCenter under Baylor Shortcuts

The Workcenter is divided into 4 main sections – My Work, Links, Reports and Queries. You can toggle between these four sections by clicking on the tabs at the top of the left hand navigation (Main or Reports/Queries)

My Work

The My Work section is designed to give you a snapshot of any “Pending Work” you might have. You should see four options here: Unpaid Voucher Status, Vouchers Submitted for Approval, Incomplete Vouchers, and Approval Worklist. To make the My Work section beneficial for you, you will need to set up appropriate filter values based on the pending work you wish to see.

- Click Edit Filters under the My Work section
> Click the Edit Filter icon to pull up the Configure Filter Values page

![Edit Filters](image)

**Required filter field value not defined**

> Configure filter values by entering specific filter amounts, i.e. Created By, Created On, Voucher ID, etc. Click OK when filter criteria is set.

![Configure Filter Values](image)

Note: At a minimum, every user should have Business Unit = BEARS. Leaving your filter criteria there will not be helpful, however, and you should try to narrow it down further. User ID and/or department ID are probably the most helpful for most users.
After clicking *OK* a message will appear stating “Refresh the pagelet to see your changes”.

The refresh pagelet icon is in the top right section of your My Work pagelet.

After editing filters, red asterisks should disappear and link label should appear normally without notification of undefined filter field.
Note: The Approval Worklist does not have a filter option. It is already pre-configured by the system to show items that are specific to the user.

Note: If an item in the My Work section does not appear to be a blue, clickable link (in other words, the text is black or grey), that means there are no pending transactions that fall under the filter criteria you set.

Links

The Links section is provided for further ease of access to typical navigation of the system. In other words, you do not need to leave the Workcenter to navigate elsewhere within the system. Simply click the folder name to see more menu options.

Under External Links, these are links to other sites outside of TRAX/PeopleSoft that are beneficial to most approvers and departmental power users.
Queries

- A query is a way to retrieve data that is stored in the PeopleSoft database. We currently have 2 queries that can be found in the Query section of the Workcenter. Plans are in place to expand this capability in the future.

For now, you can find:
- Vouchers created by a particular User ID
- Budget Change Requests that are pending approval by the Budget Office.

- To run one of these queries, first click on the link for the query you wish to run.

- Enter your criteria. In this example, I said I wanted to search for all Vouchers created by BQB1, entered on or after June 1, 2015. No approval status was entered. Try to enter as much data as possible to narrow down your search. In general, the more you know, the quicker the query will run.
**Reports**
This is one menu item that contains various budget and accounting reports.

- Under *Reports/Processes*, click the drop down arrow next to *Reports* to bring up all of the various types of reports under the menu.

**Feature alert!** Click the wheel icon and then *Personalize* in the top right corner of the Reports/Processes pagelet.
Here you can default your Run Control ID values. Enter the correct Run Control ID and then click Save at the bottom of the screen.

Click OK here.

The refresh pagelet icon is in the top right section of your Reports pagelet. Click it. The next time you run a report, you will bypass the Run Control screen.