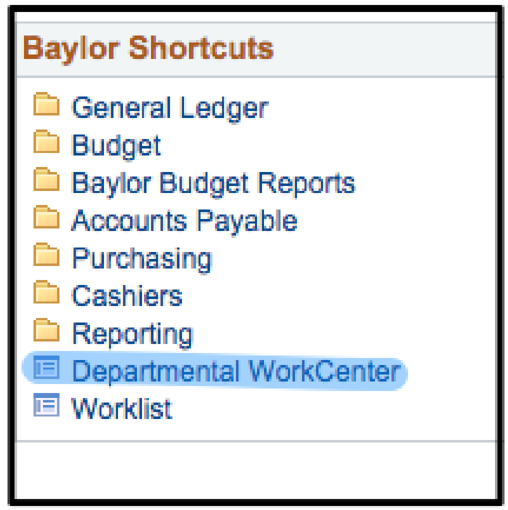
PeopleSoft 9.2 Workcenters

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*

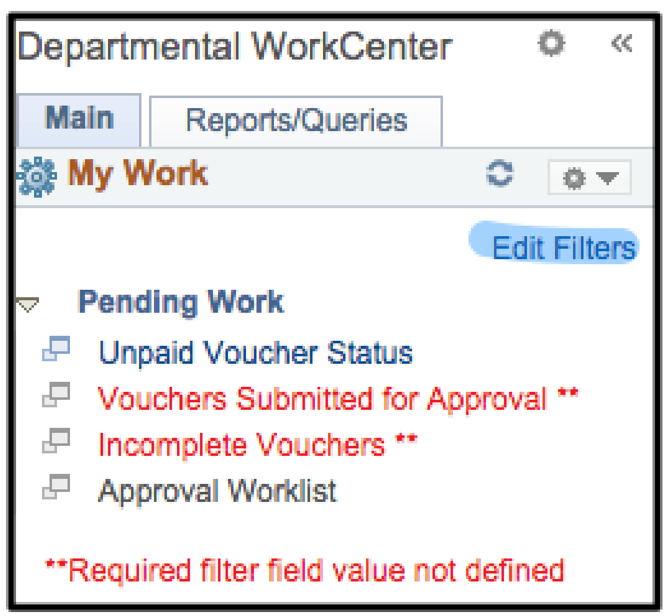


The *Workcenter* is divided into 4 main sections – *My Work*, *Links*, *Reports* and *Queries*. You can toggle between these four sections by clicking on the tabs at the top of the left hand navigation (*Main* or *Reports/Queries*)

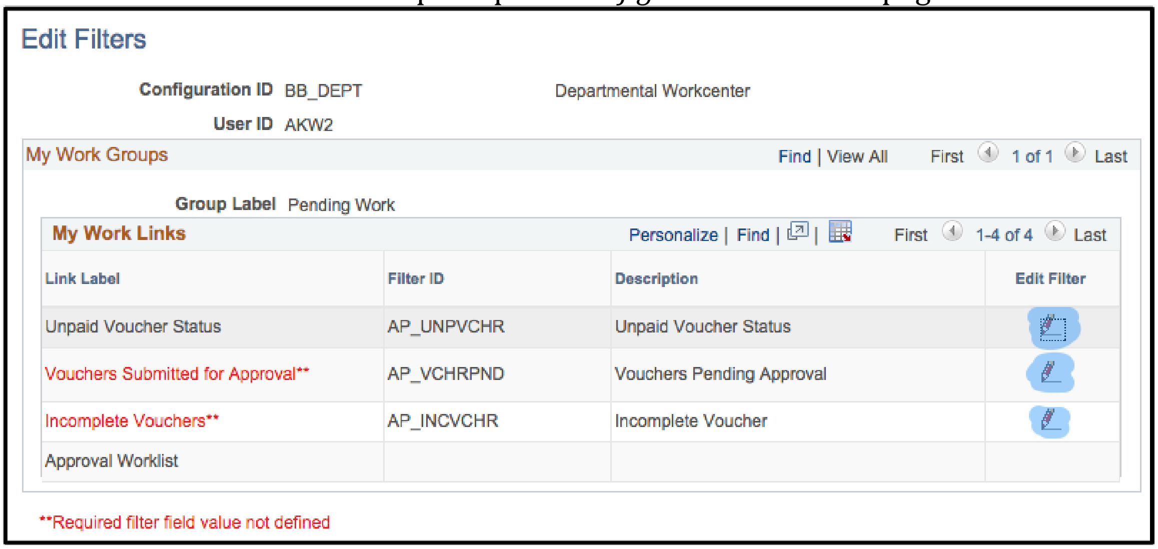
My Work

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

Configuration ID BB_DEPT Departmental Workcenter

User ID AKW2

My Work Groups Find | View All First 1 of 1 Last

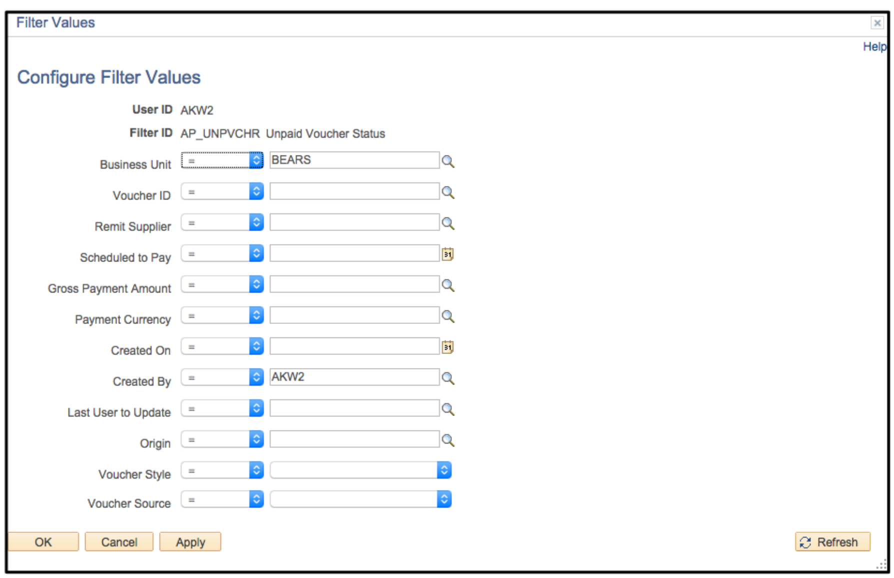
Group Label Pending Work

My Work Links Personalize | Find | First 1-4 of 4 Last

Link Label	Filter ID	Description	Edit Filter
Unpaid Voucher Status	AP_UNPVCHR	Unpaid Voucher Status	
Vouchers Submitted for Approval**	AP_VCHRPND	Vouchers Pending Approval	
Incomplete Vouchers**	AP_INCVCHR	Incomplete Voucher	
Approval Worklist			

**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.



Filter Values

Help

Configure Filter Values

User ID AKW2

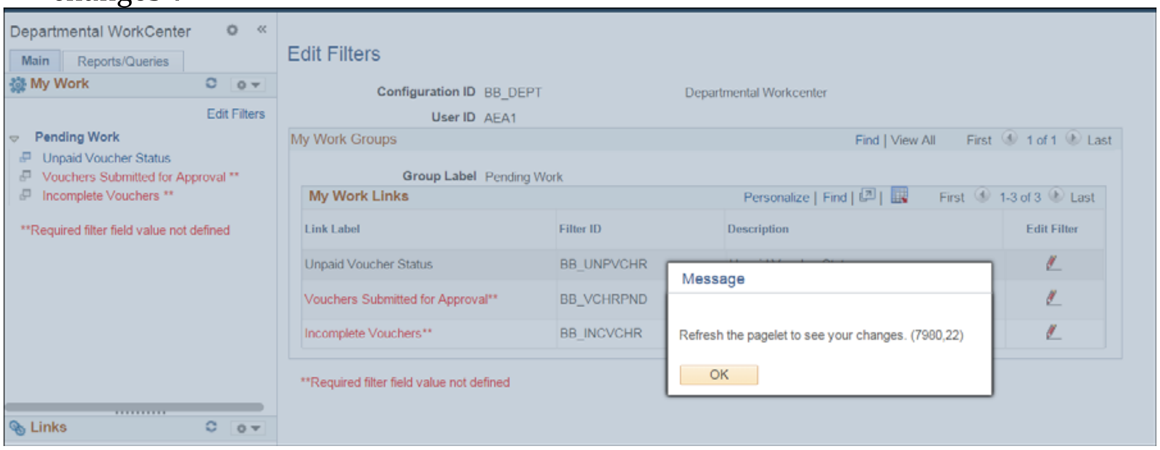
Filter ID AP_UNPVCHR Unpaid Voucher Status

Business Unit	=	BEARS
Voucher ID	=	
Remit Supplier	=	
Scheduled to Pay	=	
Gross Payment Amount	=	
Payment Currency	=	
Created On	=	
Created By	=	AKW2
Last User to Update	=	
Origin	=	
Voucher Style	=	
Voucher Source	=	

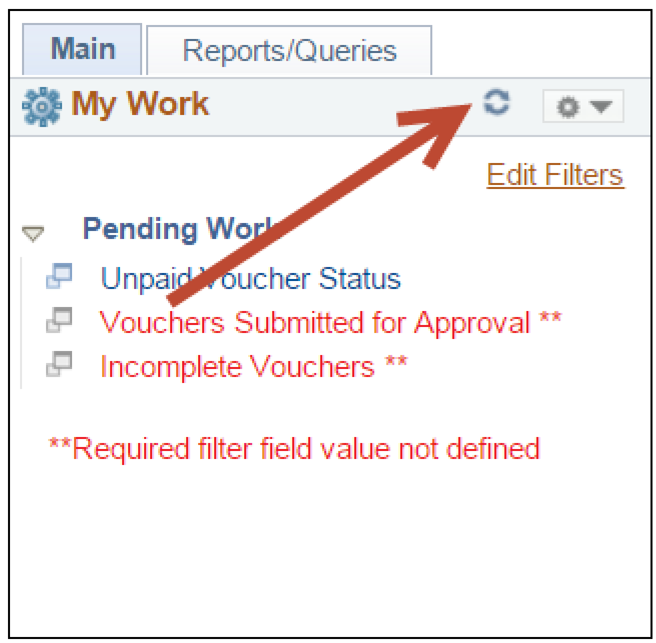
OK Cancel Apply Refresh

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.

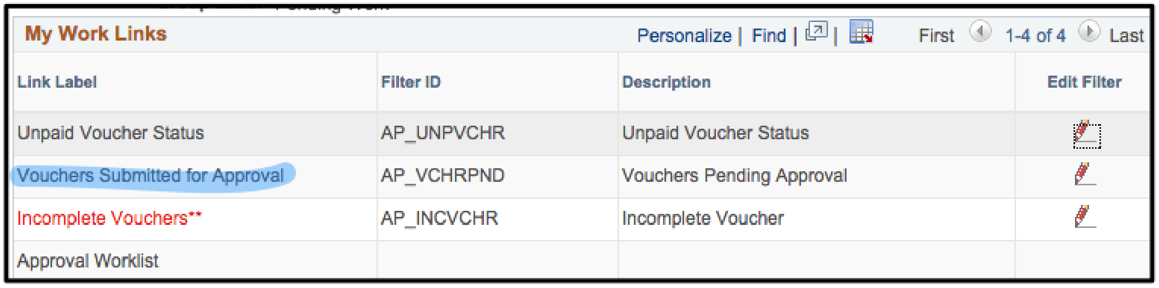
- After clicking *OK* a message will appear stating "Refresh the pagelet to see your changes".



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.



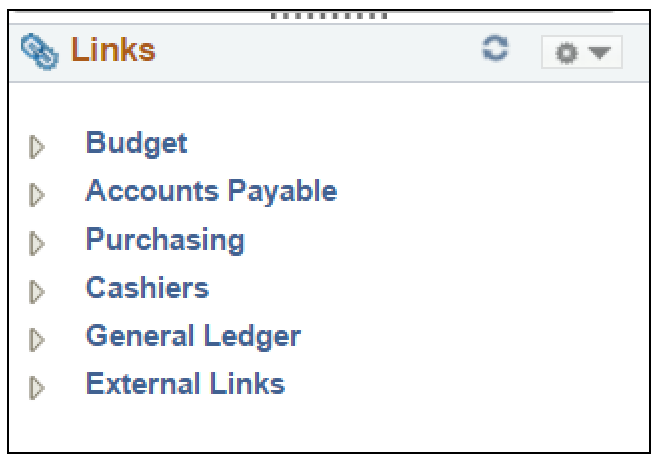
My Work Links			
Link Label	Filter ID	Description	Edit Filter
Unpaid Voucher Status	AP_UNPVCHR	Unpaid Voucher Status	
Vouchers Submitted for Approval	AP_VCHRPND	Vouchers Pending Approval	
Incomplete Vouchers**	AP_INCVCHR	Incomplete Voucher	
Approval Worklist			

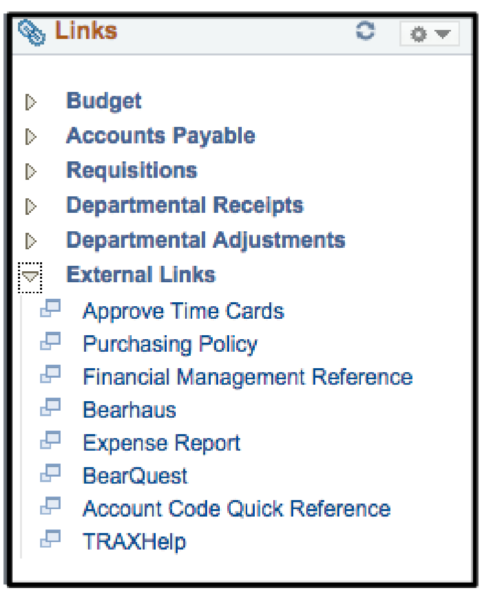
➢ Note: The *Approval Worklist* does not have a filter option. It is already pre-configured by the system to show items that are specific to the user.

➢ 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.



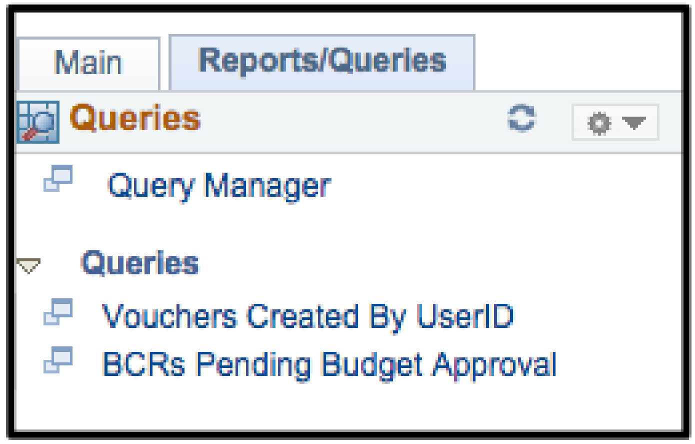


➢ Under *External Links*, these are links to other sites outside of TRAX/PeopleSoft that are beneficial to most approvers and departmental power users.

Queries

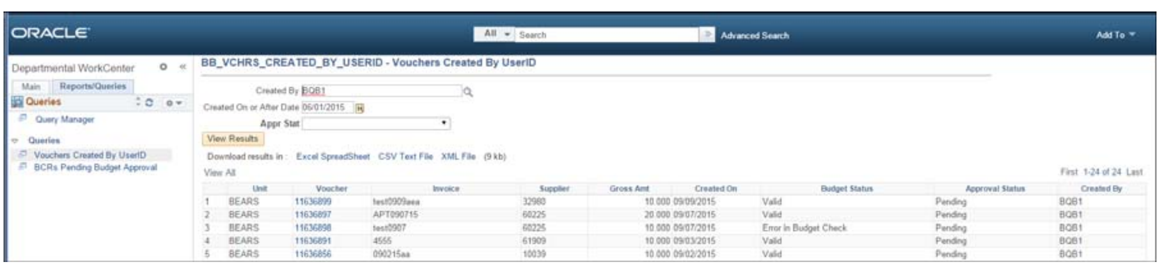
- A *query* is a way to retrieve data that is stored in the PeopleSoft database. We currently have 2 queries that can be found in the Query section of the Workcenter. Plans are in place to expand this capability in the future.

For now, you can find:
Vouchers created by a particular User ID
-and-
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.

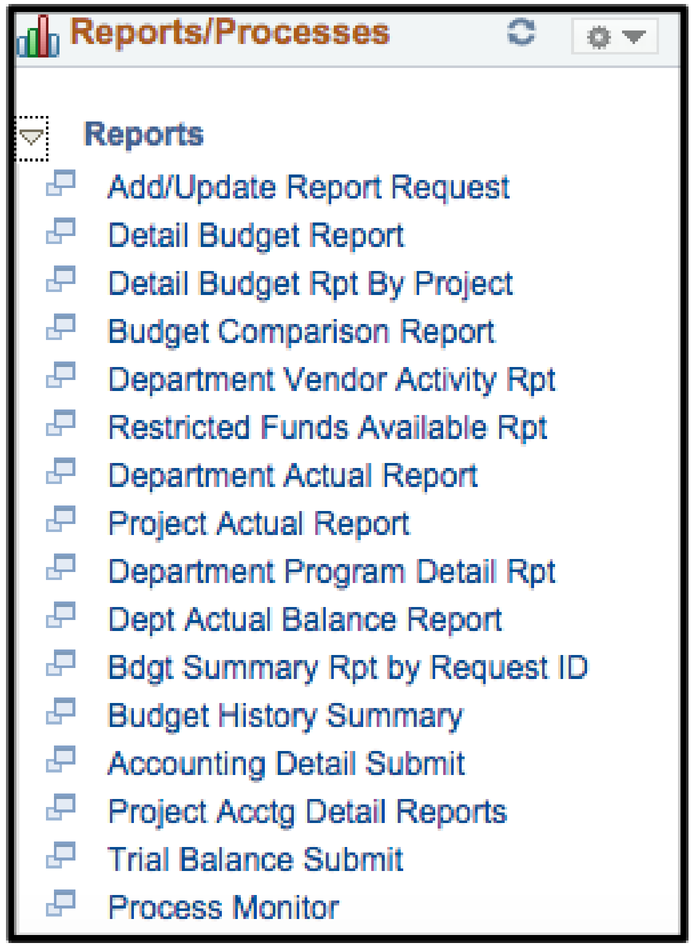
- Enter your criteria. In this example, I said I wanted to search for all Vouchers created by BQB1, entered on or after June 1, 2015. No approval status was entered. Try to enter as much data as possible to narrow down your search. In general, the more you know, the quicker the query will run.

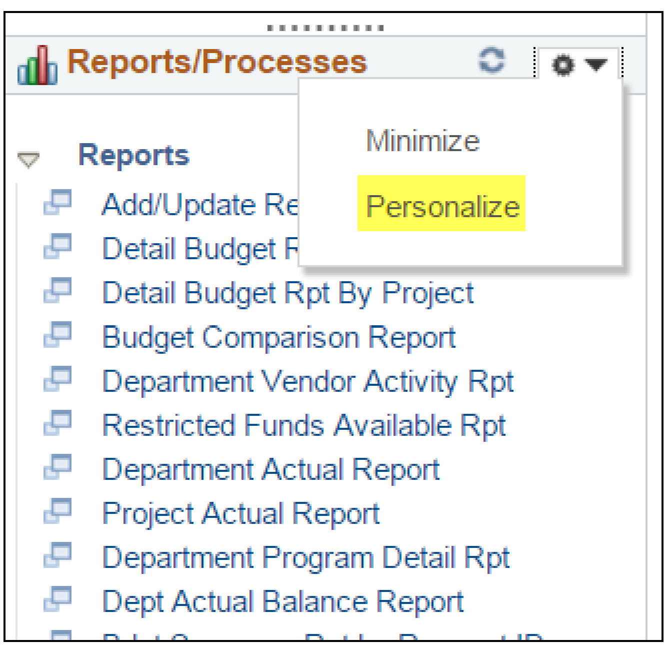


Reports

This is one menu item that contains various budget and accounting reports .

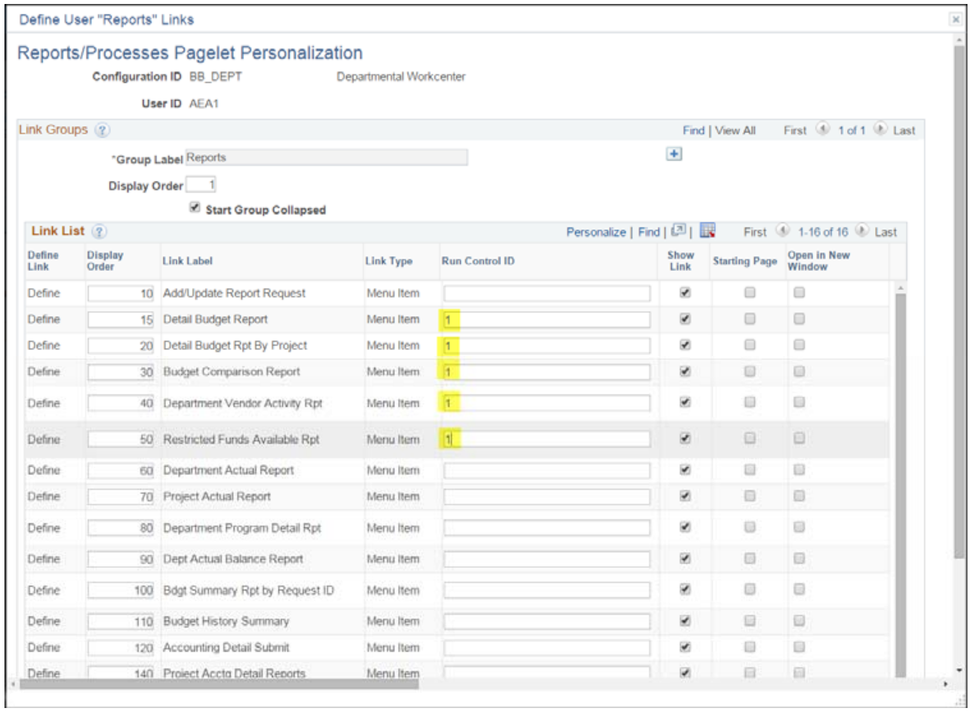
- Under *Reports/Processes*, click the drop down arrow next to *Reports* to bring up all of the various types of reports under the menu

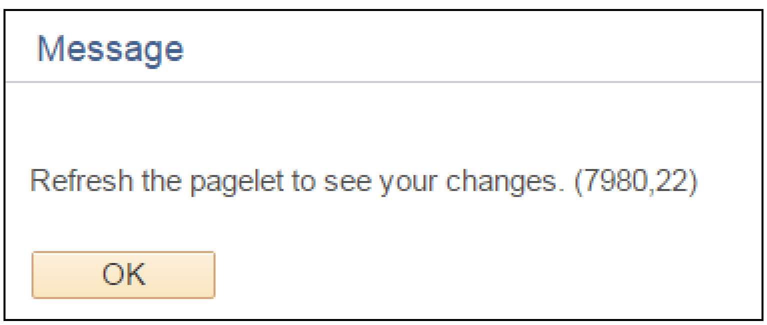




Feature alert! Click the wheel icon and then *Personalize* in the top right corner of the Reports/Processes pagelet.

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.