Buyer WorkCenter

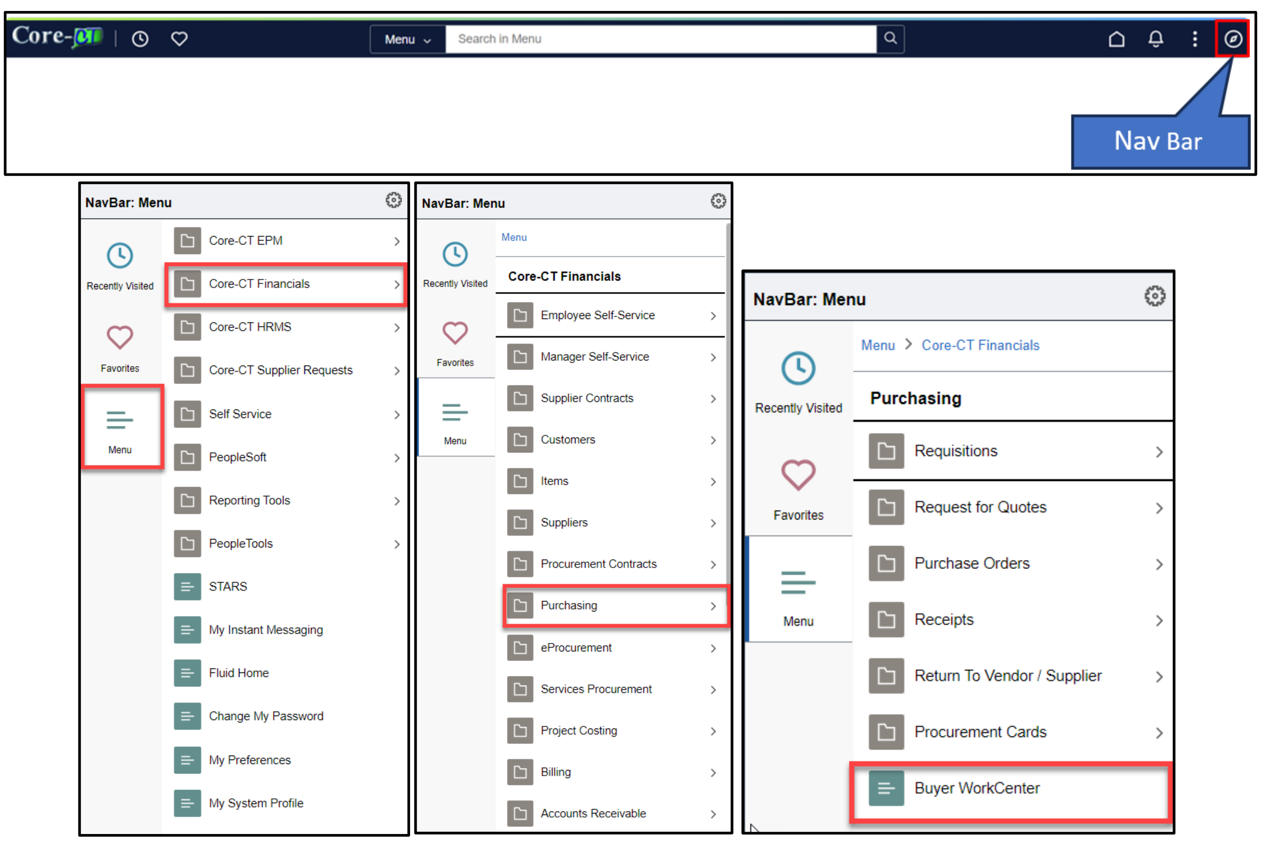
The Buyer WorkCenter is designed to be a navigational center for end users. The WorkCenter helps end users become more efficient by accessing frequently used pages and pagelets. WorkCenters are designed for specific roles and provide a singular location for access to key processes within Financial and Supply Chain applications. Users will be able to perform daily tasks without leaving the WorkCenter, which reduces time when navigating through menu items.

***Important Note*:** *Users must have their Filters defined to see results in the **My Work** section. For more information on how to define **Filters**, refer to the WorkCenter Personalization job aid.*

Buyer WorkCenter

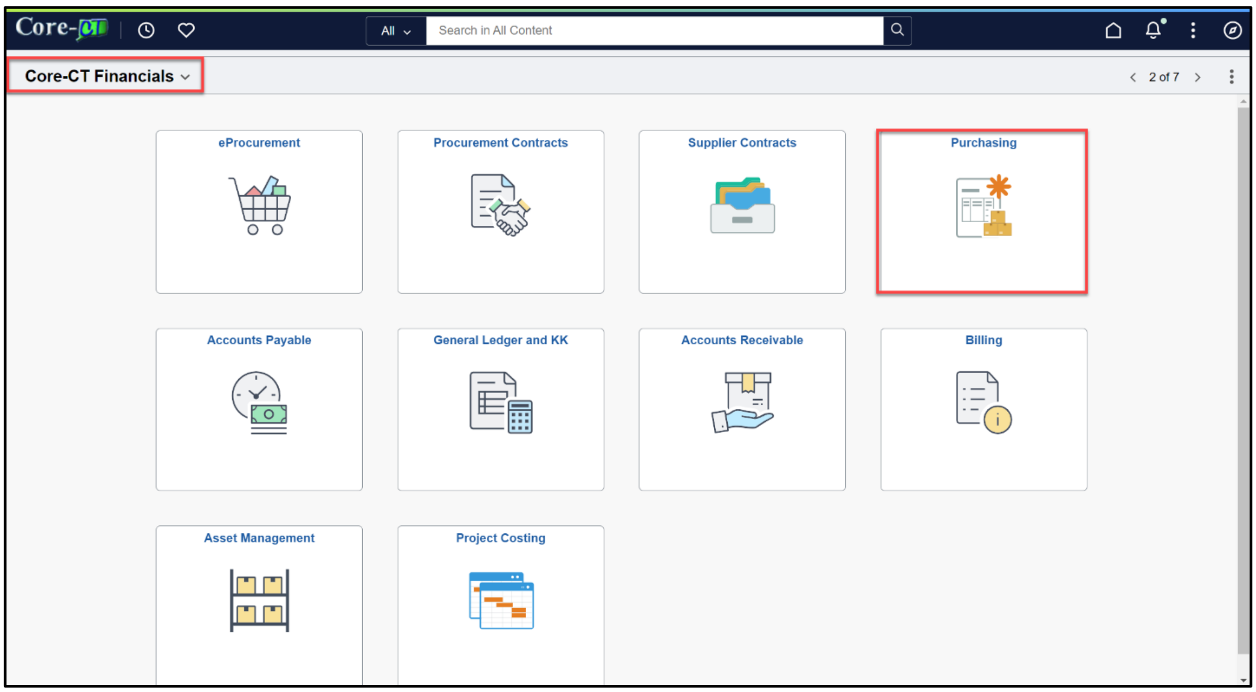
Navigation:

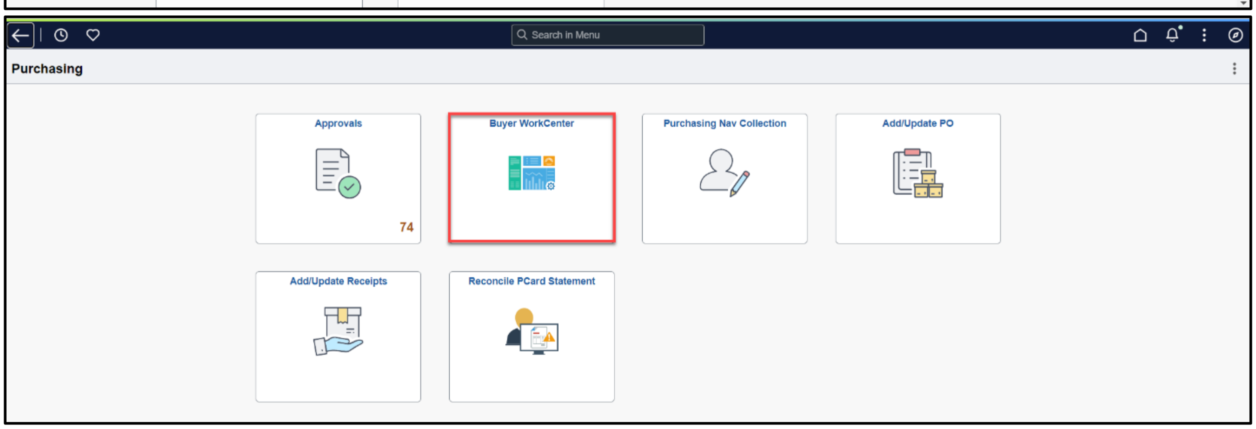
Nav Bar > Menu > Core-CT Financials > Purchasing > Buyer WorkCenter



Or

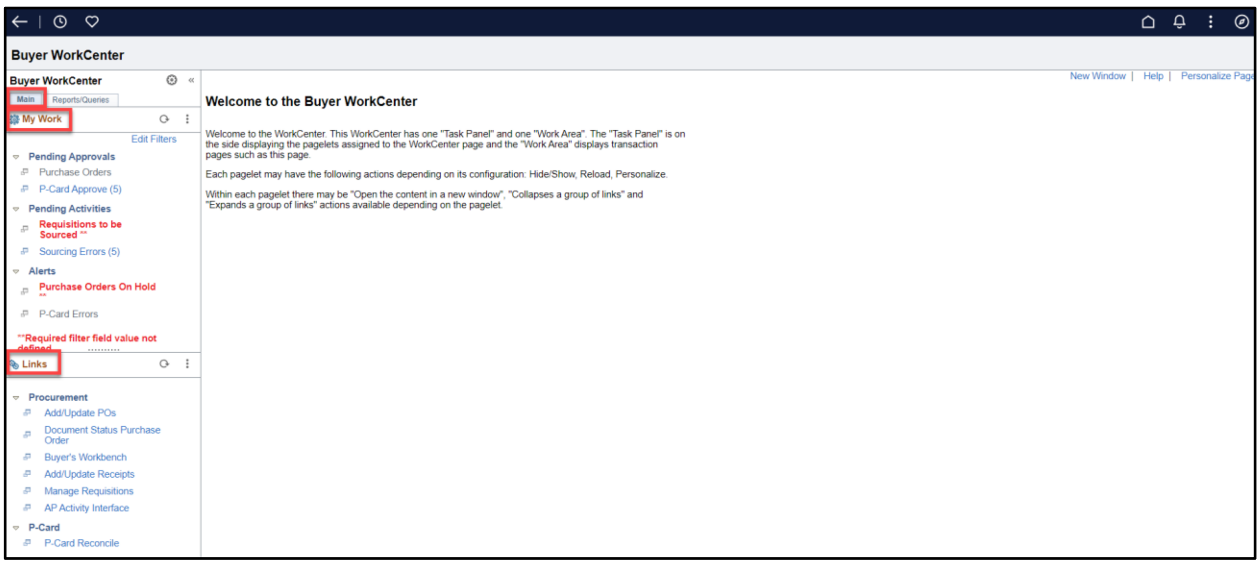
*Select **Core-CT Financials***
*Click **Purchasing** Tile*
*Click **Buyer WorkCenter***

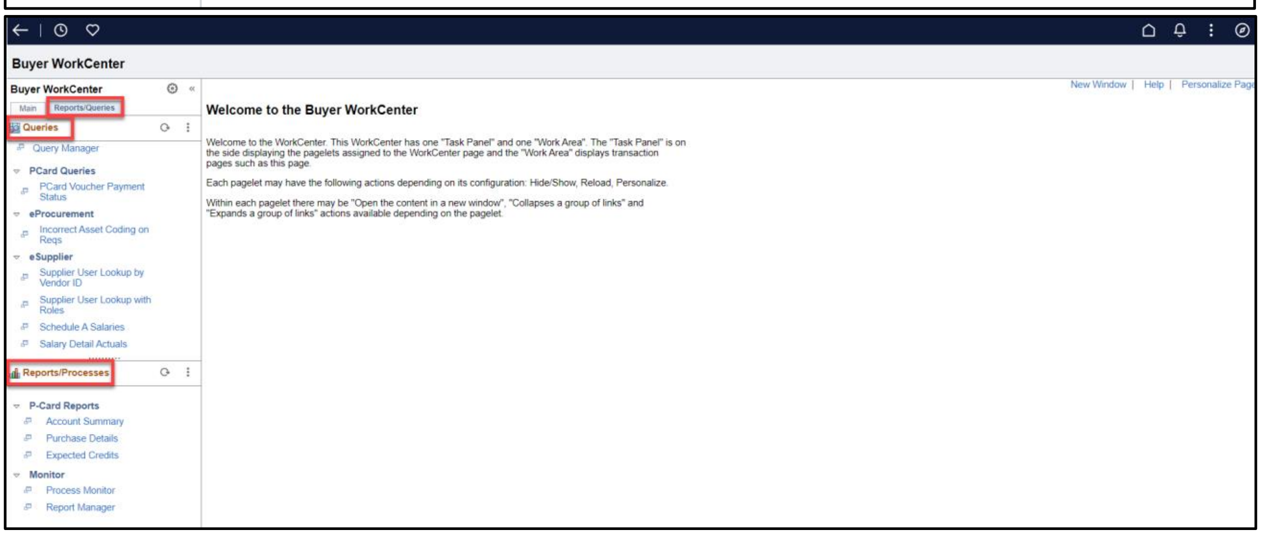




The **Buyer Workcenter** includes 2 primary tabs:

- Main
  - My Work
  - Links
- Reports/Queries
  - Queries
  - Reports/Processes

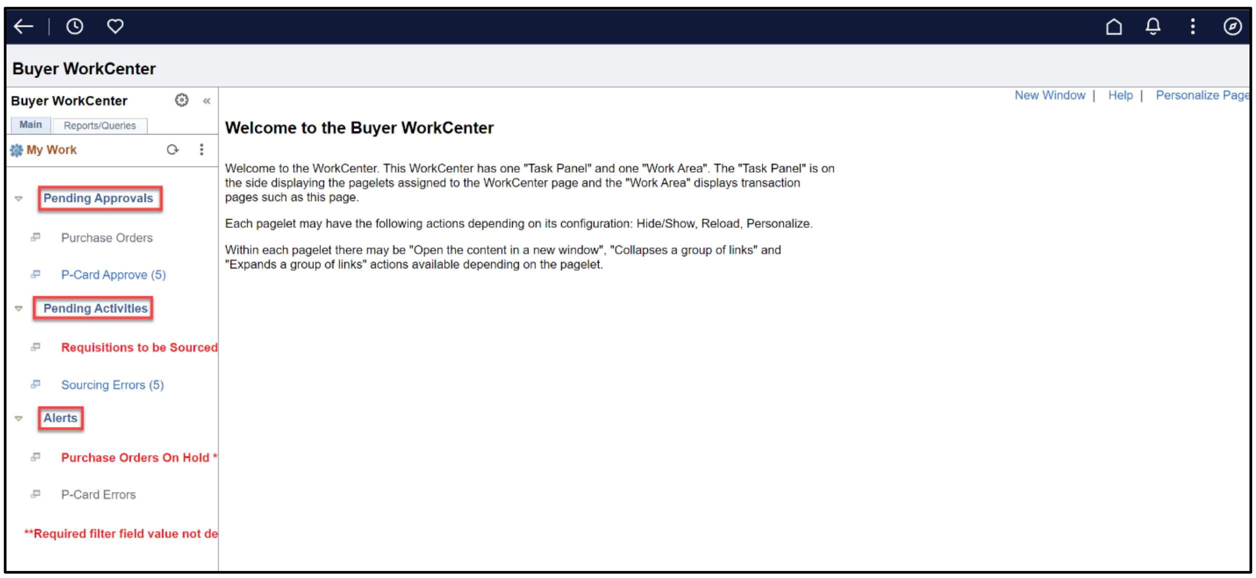




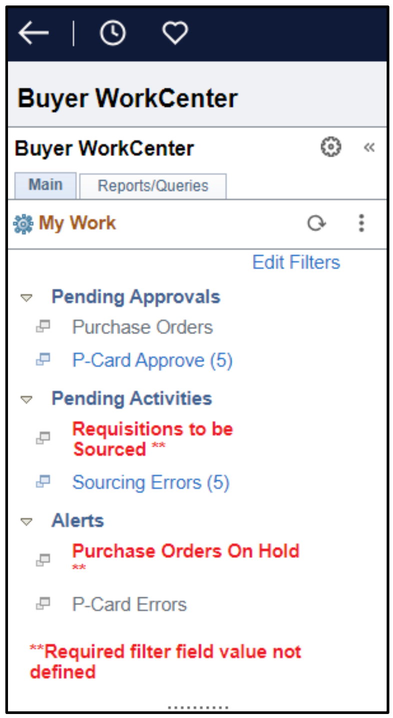
The Buyer WorkCenter allows users to access multiple pages and complete daily tasks without navigating away, saving time spent on menu navigation.
It is designed to enhance productivity for a specific role by centralizing and simplifying tasks in one location.

Main

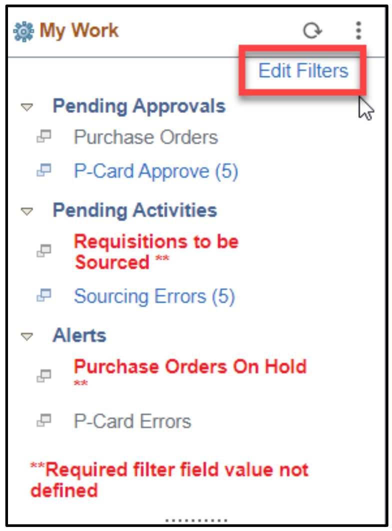
- The **My Work** section of the **Main** tab provides links to pages that are frequently accessed daily. Additionally, it can include exceptions and alerts, where the user must act. **Pending Approvals**, **Pending Activities**, and **Alerts**.



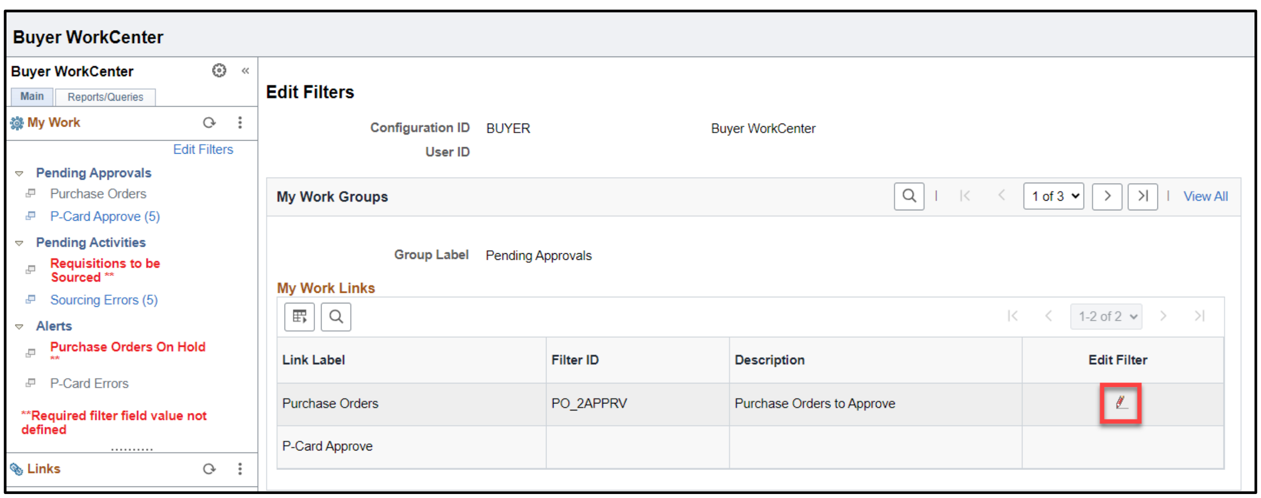
- If the links are red, it indicates that a filter needs to be defined.
- If the links are grey, it means there are no transactions.
- The number displayed represents the total number of transactions.



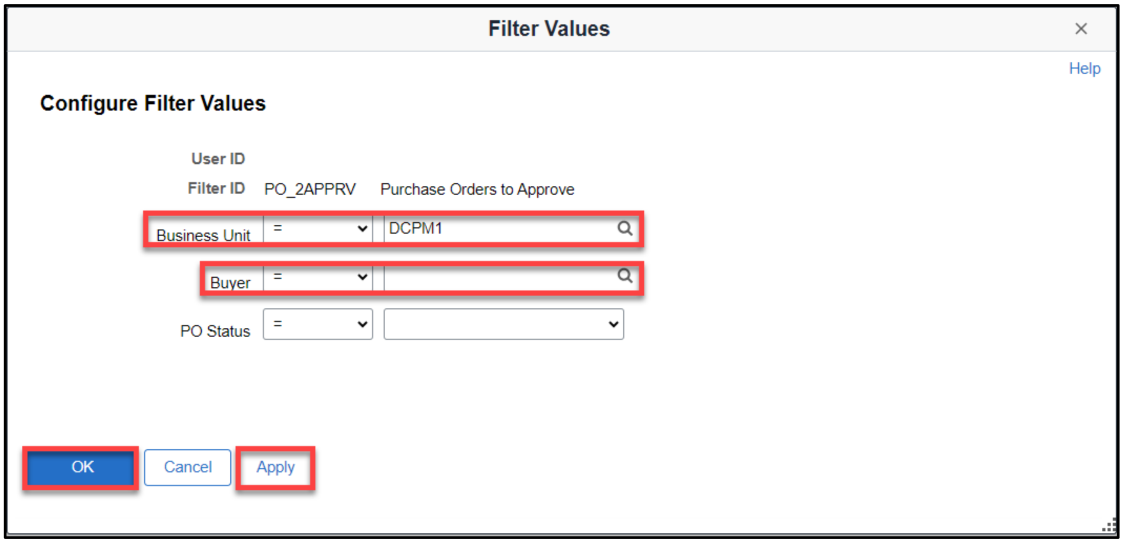
- For red line items, filters need to be defined. You only need to set them up once. To do this, click on the **Edit Filters** link.



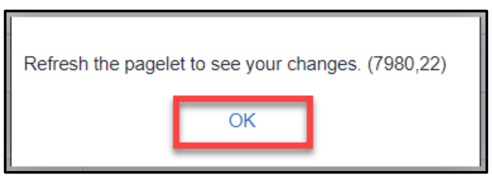
- Click on the **Edit Filter** icon .

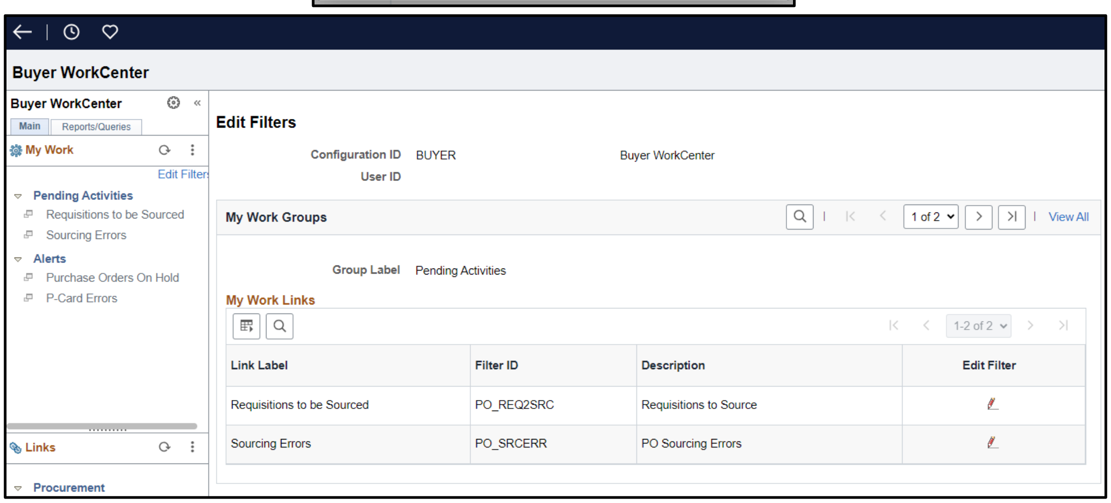


- Enter the **Buyer** and the **Business Unit** and click Apply.
- Click OK

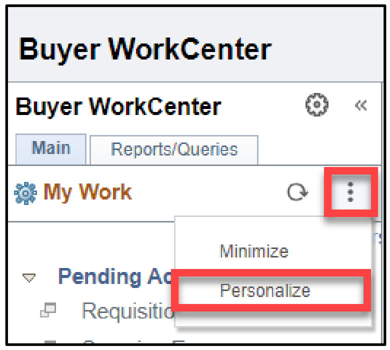


- Click OK to the message.

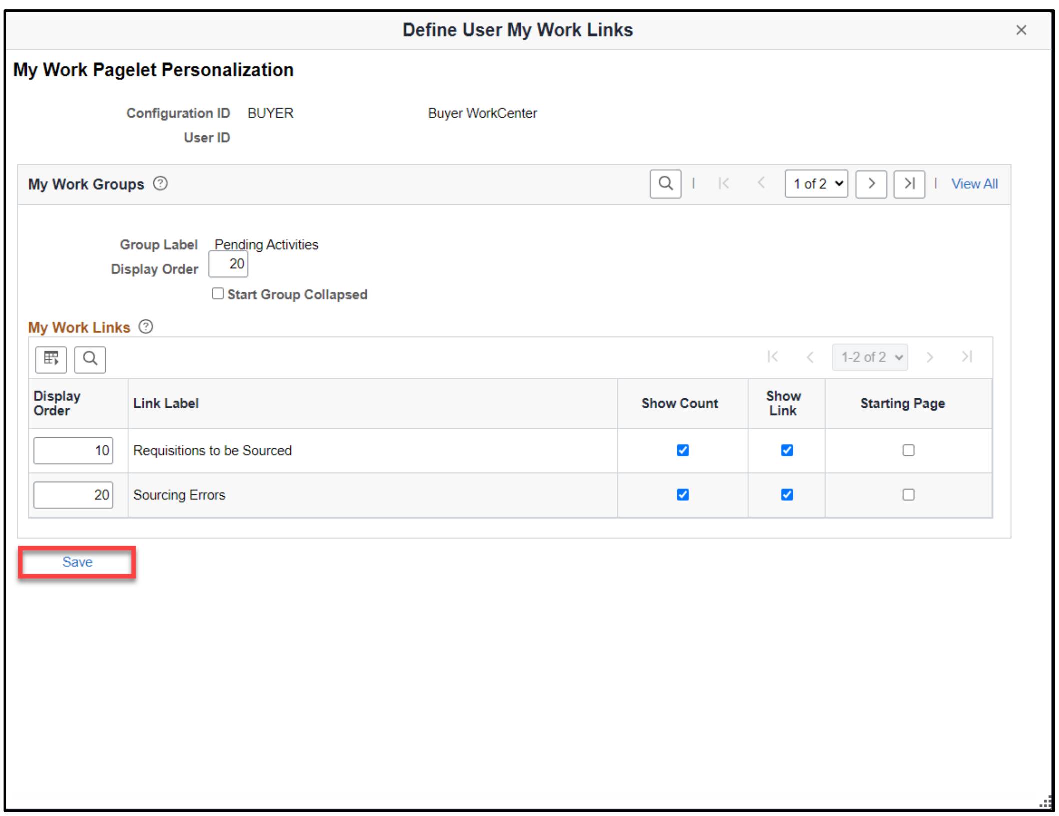




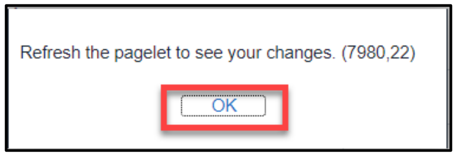
- You can also Personalize your WorkCenter according to your requirements.
  - Click on the **My Work Pagelet Settings** drop down and select **Personalize**.



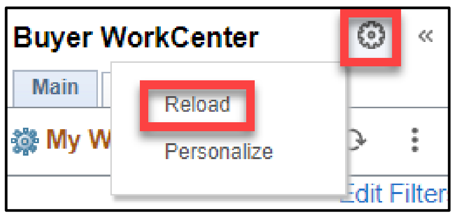
- You can remove and/or reorder the **My Work** links however you **cannot add** work links since these are based on your roles and security.
- Users can sequence the pagelets display or hide the links according to their need.
- After making changes, click the **Save** button.



- Click OK button to the message about Refreshing the pagelet to see your changes.

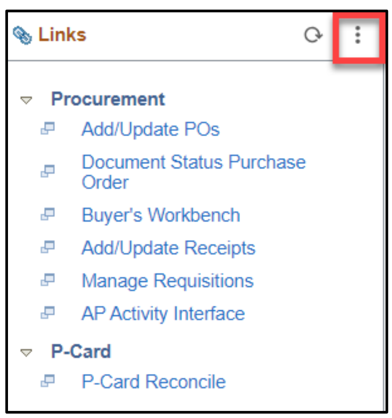


- Click on the Refresh icon to update your WorkCenter with the changes you have made.
- Click the Settings icon to Reload the page back to the Welcome page.

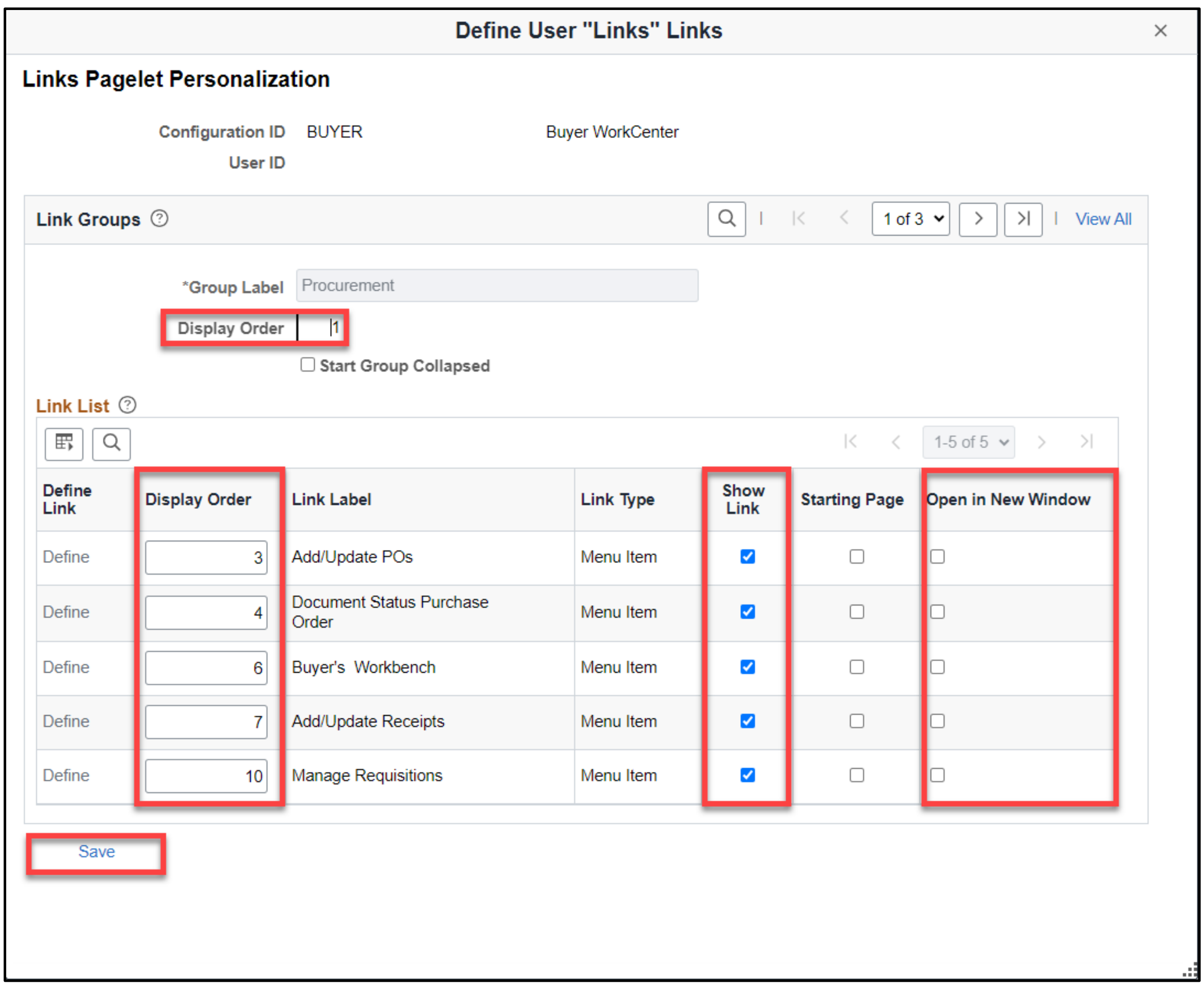


➢ The **Links** section of the **Main** tab provides additional links to pages or areas of interest, which can also be personalized. External page links can be added to this section as well.

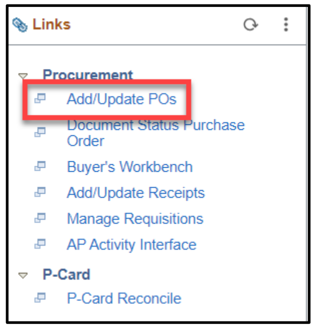
- Click the **Links Pagelet Settings** icon and select **Personalize**.



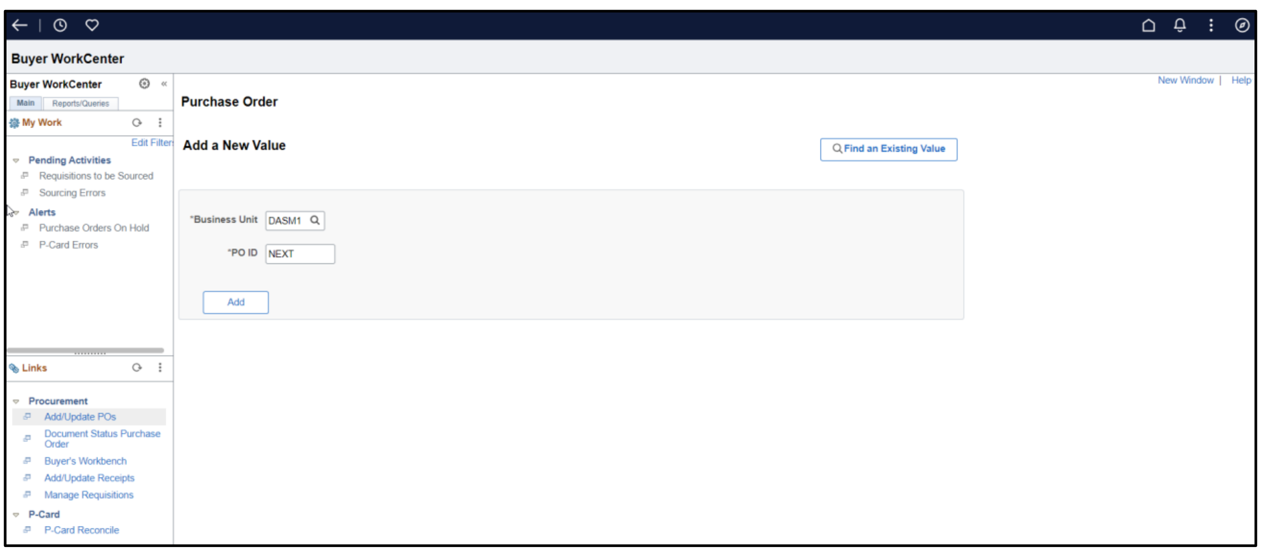
- Use the **Display Order** column to number in which order the links should appear. Where 1 is at the top of the section.
- The **Show Link** column can be used to display or hide available links. To hide an item, uncheck the **Show Link** checkbox.
- The **Open in New Window** link can be used to determine if a link should open within the WorkCenter or on a new page. To have an item open on a new page, check the **Open in New Window** checkbox.
- Click the **Save** button.
- Answer **OK** to the Refresh Pagelet message. You will return to the Welcome screen.



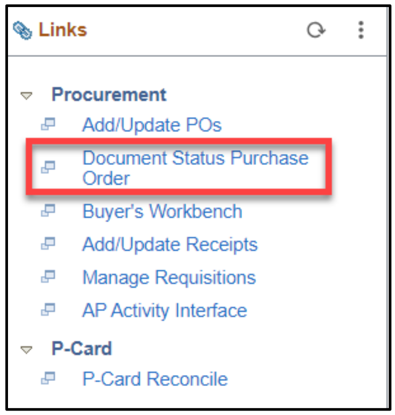
- Click the **Add/Update PO** link.



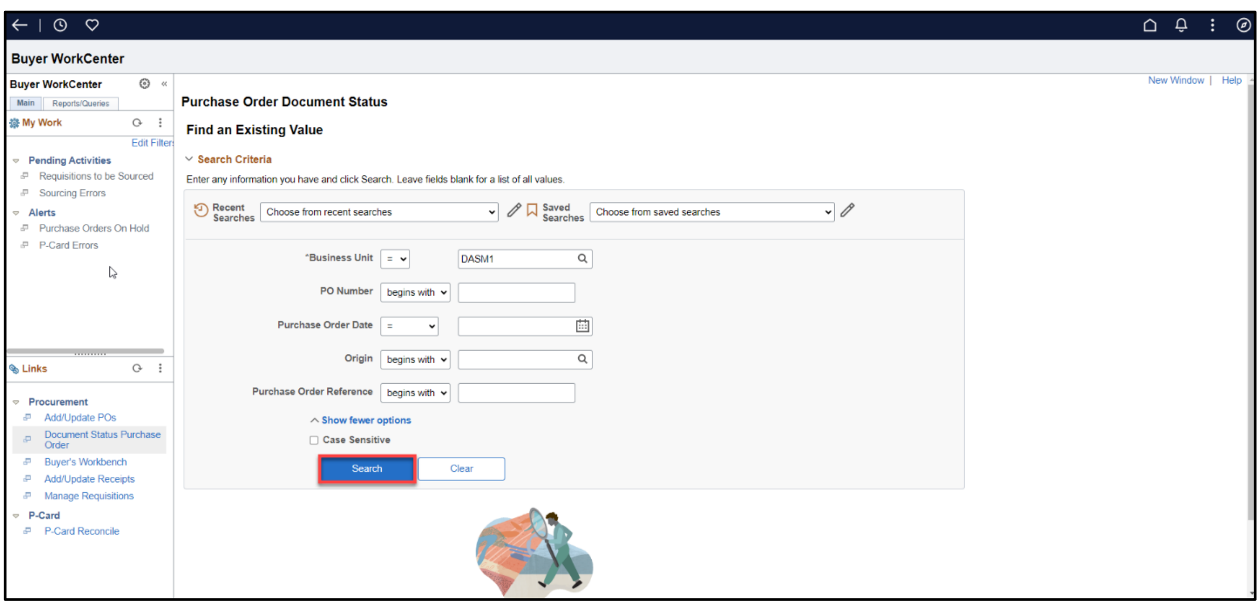
- The **Add/Update PO** link displays the PO page which provides the ability to search for an existing PO or adding a new PO without having to navigate to the page using the menu.



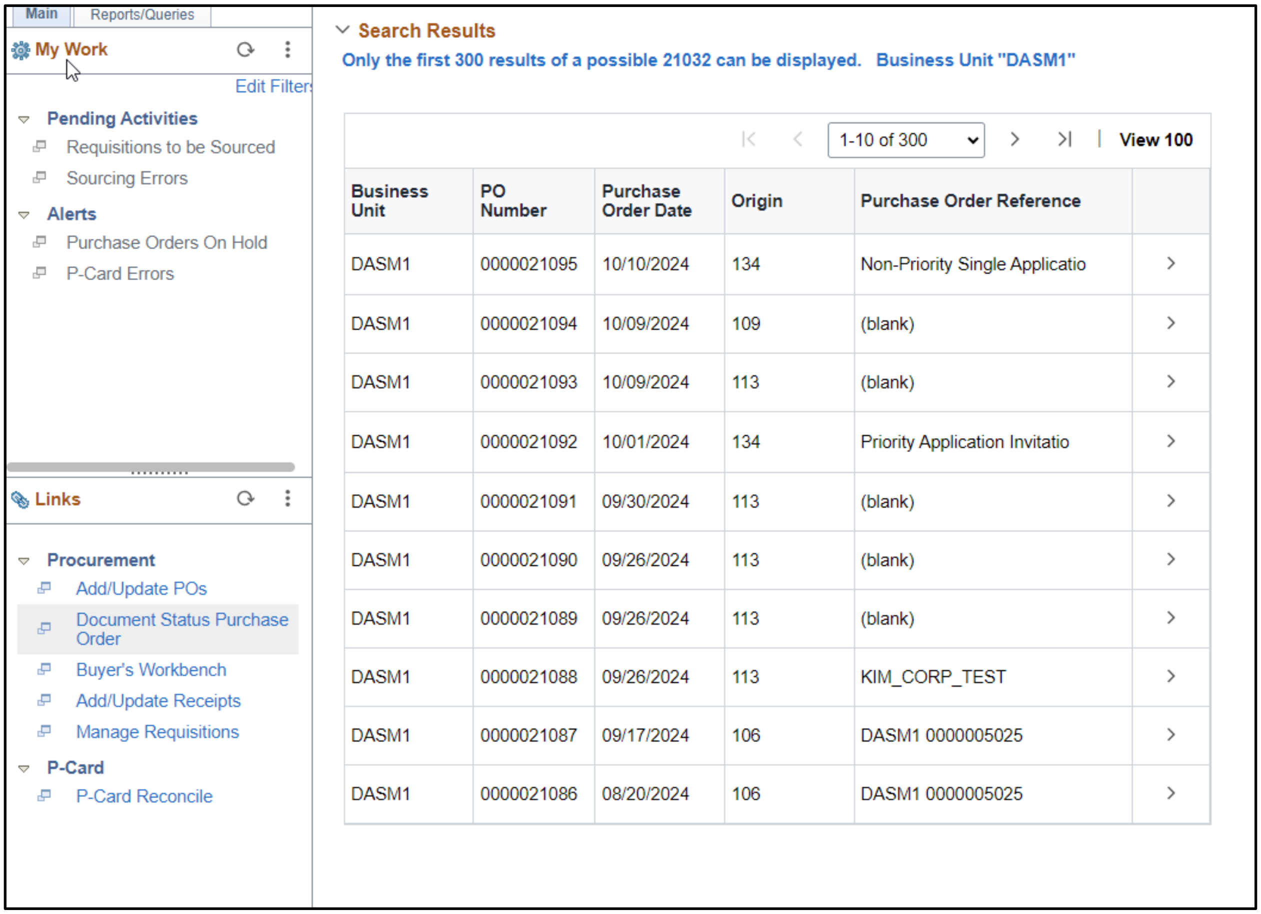
- Click the **Document Status Purchase Order** link.



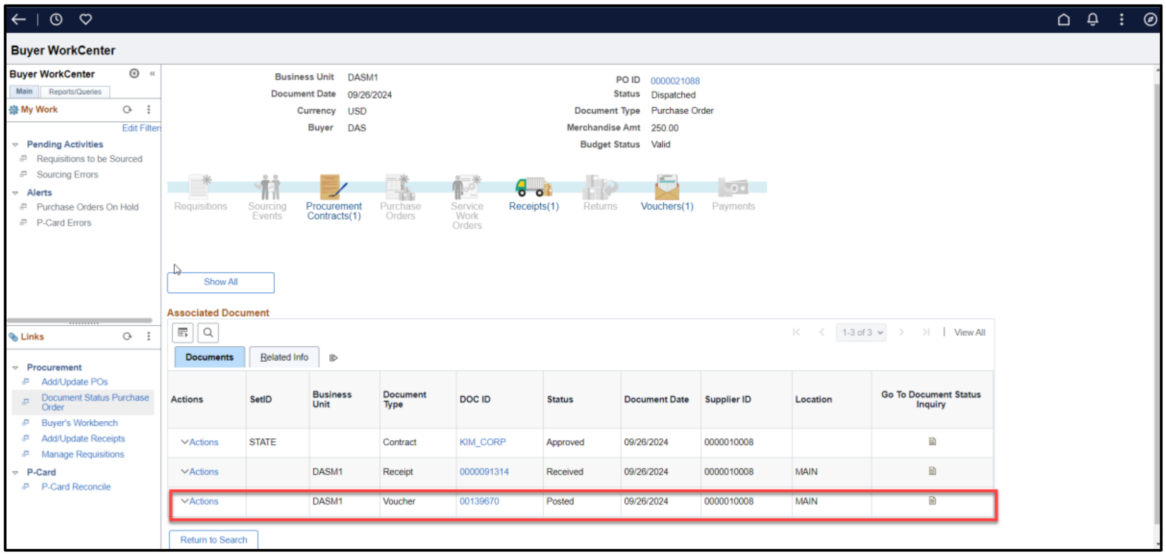
- The **Document Status Purchase Order** link displays the **Search Criteria** page to search for existing Purchase Orders.
- Enter information into a **Search Criteria** field to access information to find your PO information and click **Search**.



- You can view the pertinent information concerning your PO (receipt, voucher, contract, etc) using this link.

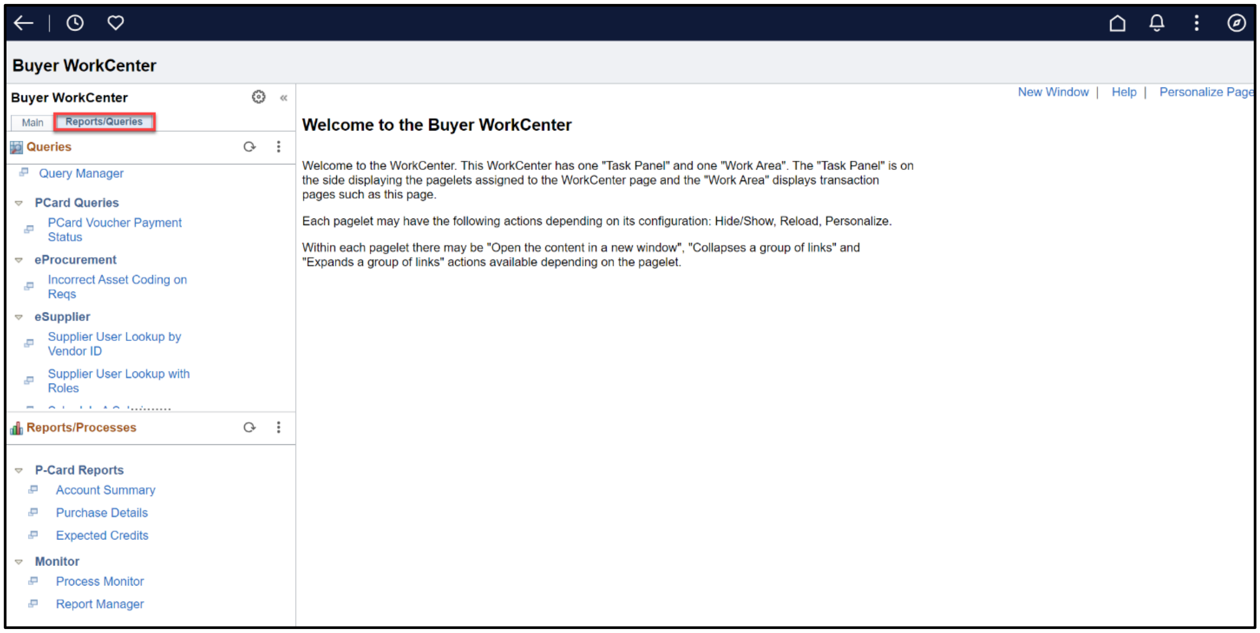


- Click on the **DOC ID** and you will be able to view information concerning the actual document.
- Click on the **DOC ID** for the **Voucher** and under the actions drop down box you will be able to view most information about the voucher and payments made as it relates to the PO.

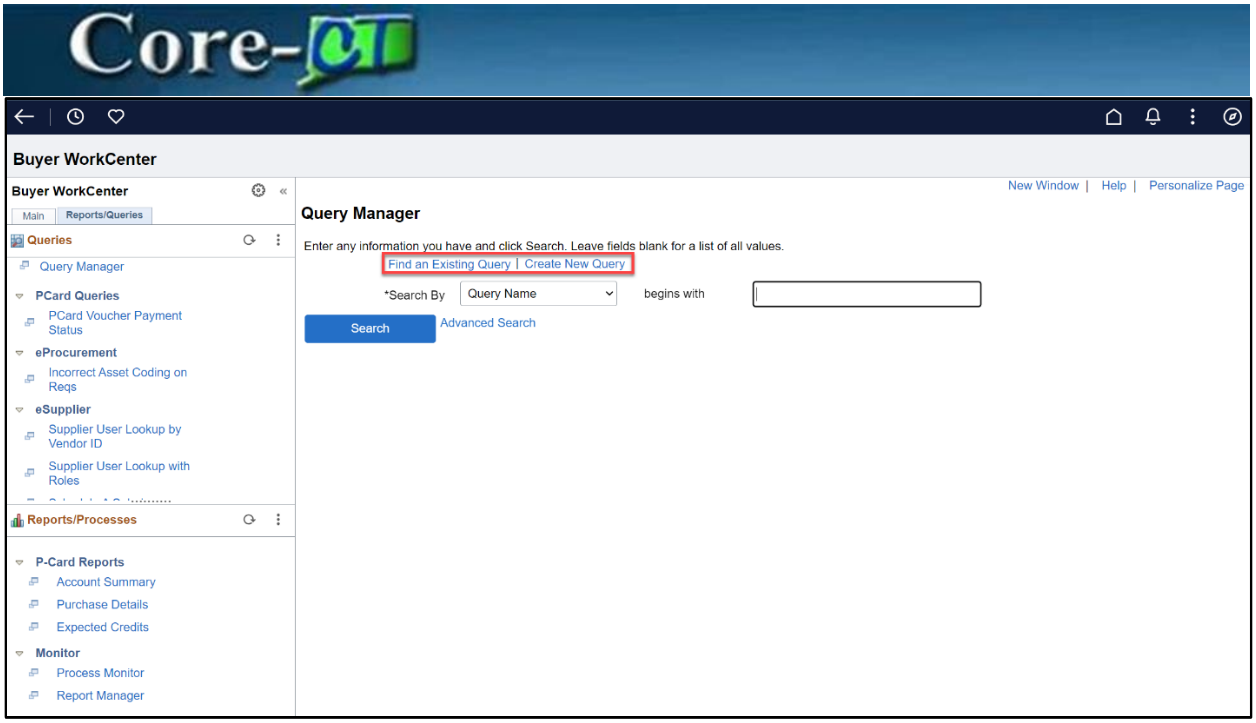


➢ Query Manager

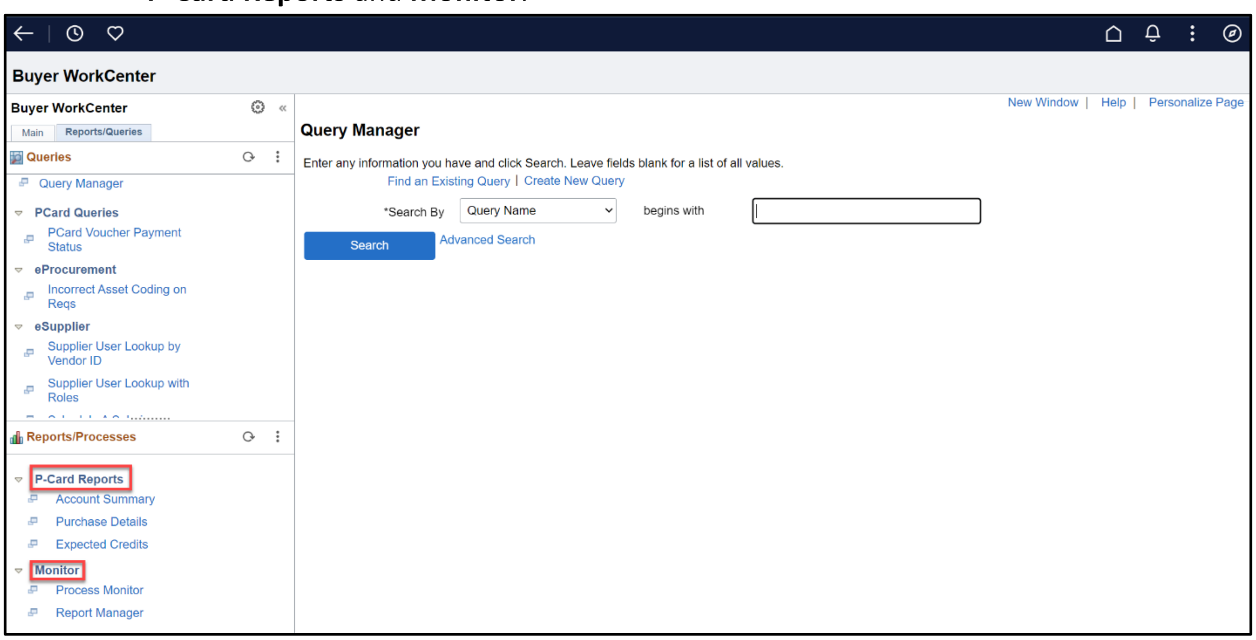
- Click **Reports/Queries** tab.



- Click Query Manager.
- The **Queries** section includes links to **Query Manager**, public and private queries, and pivot grids.
- When a link is selected, the query or pivot grid results are displayed in the right pane of the WorkCenter or in a new window. Query results can be saved to Microsoft Excel.
- Using the **Search** function, users can pull up existing queries.
- Users may also click the **Create New Query** instead of the **Find an Existing Query** link. – Note: Only Central agency users can add their favorite queries to their Query manager. This functionality is NOT for EPM Queries.

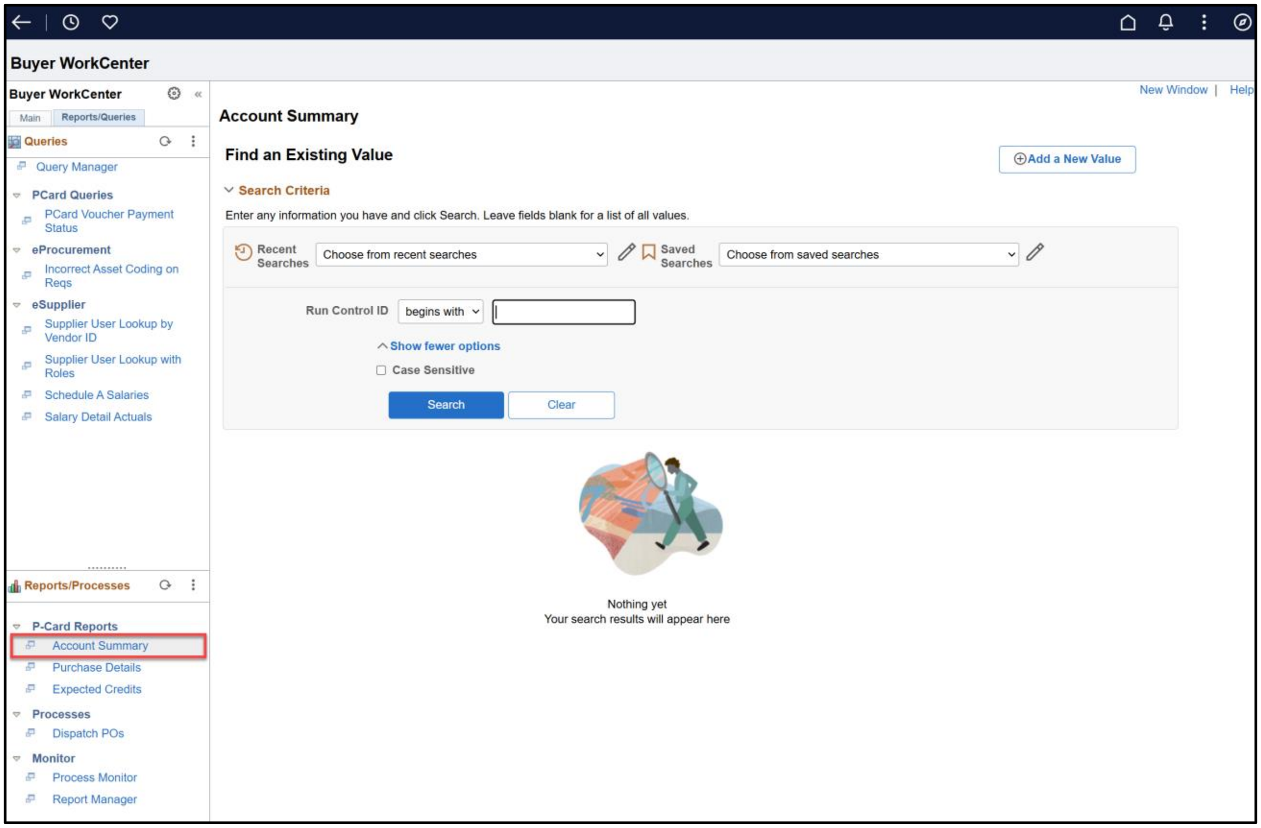


- ➢ Reports/Processes
  - The **Reports/Processes** dropdown stores different reports and processes users may need to perform daily.
  - **P-Card Reports** and **Monitor**.

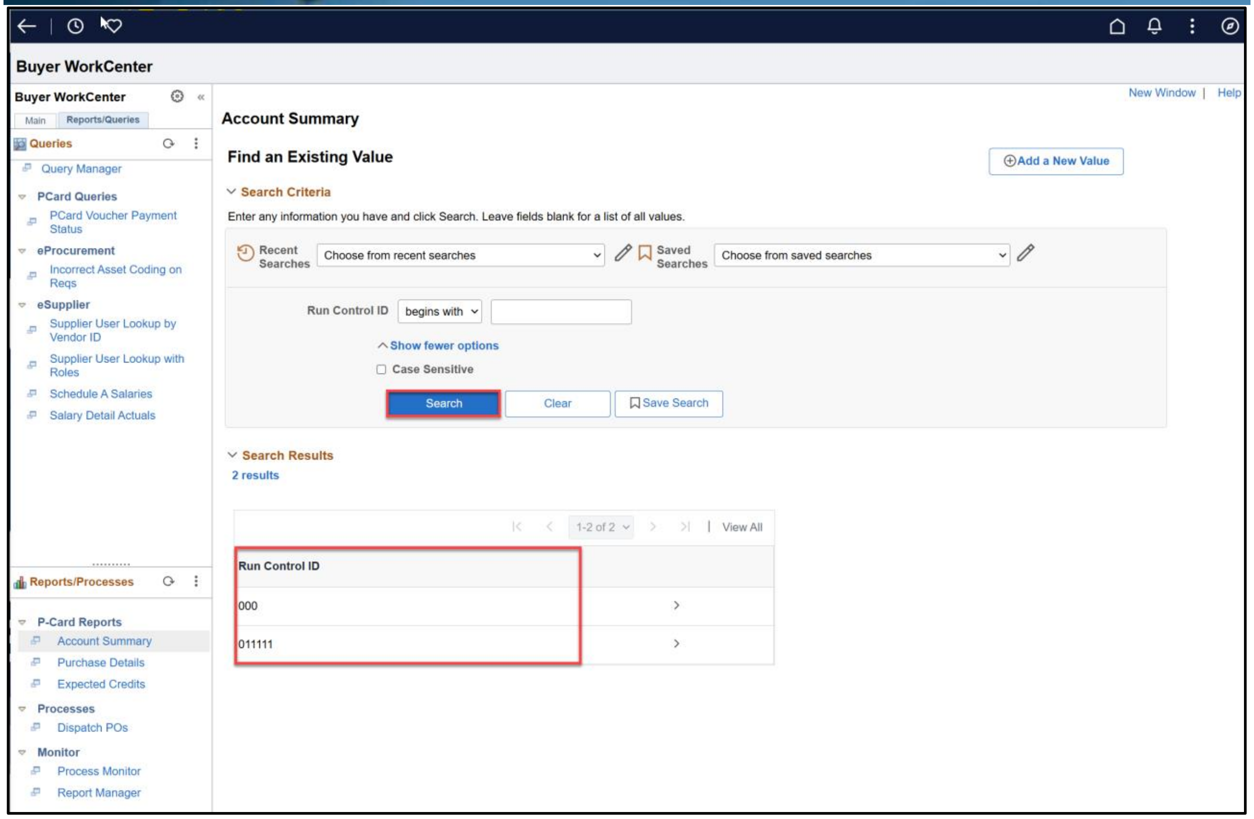


- Click the **Account Summary** link.

- The **Account Summary** link displays the search criteria to look for an existing or create a new Run Control ID to run the **P-Card Account Summary** report without having to navigate to a different page.



- Click on **Search** and choose a Run Control Id to display the Report Request Parameters needed to run the report.


Buyer WorkCenter
Buyer WorkCenter
Main
Reports/Queries
Queries
Query Manager
PCard Queries
PCard Voucher Payment Status
eProcurement
Incorrect Asset Coding on Reqs
eSupplier
Supplier User Lookup by Vendor ID
Supplier User Lookup with Roles
Schedule A Salaries
Salary Detail Actuals
Reports/Processes
P-Card Reports
Account Summary
Purchase Details
Expected Credits
Processes
Dispatch POs
Monitor
Process Monitor
Report Manager
New Window | Help
Account Summary
Find an Existing Value
Add a New Value
Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.
Recent Searches
Choose from recent searches
Saved Searches
Choose from saved searches
Run Control ID
begins with
Show fewer options
Case Sensitive
Search
Clear
Save Search
Search Results
2 results
1-2 of 2
View All
Run Control ID
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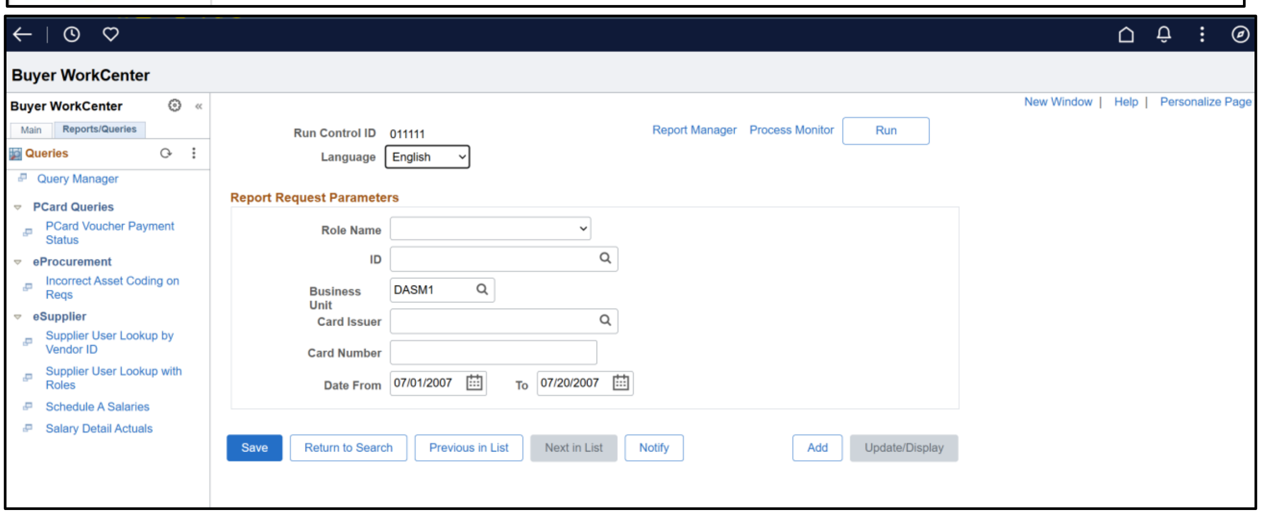
Buyer WorkCenter
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Main
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Query Manager
PCard Queries
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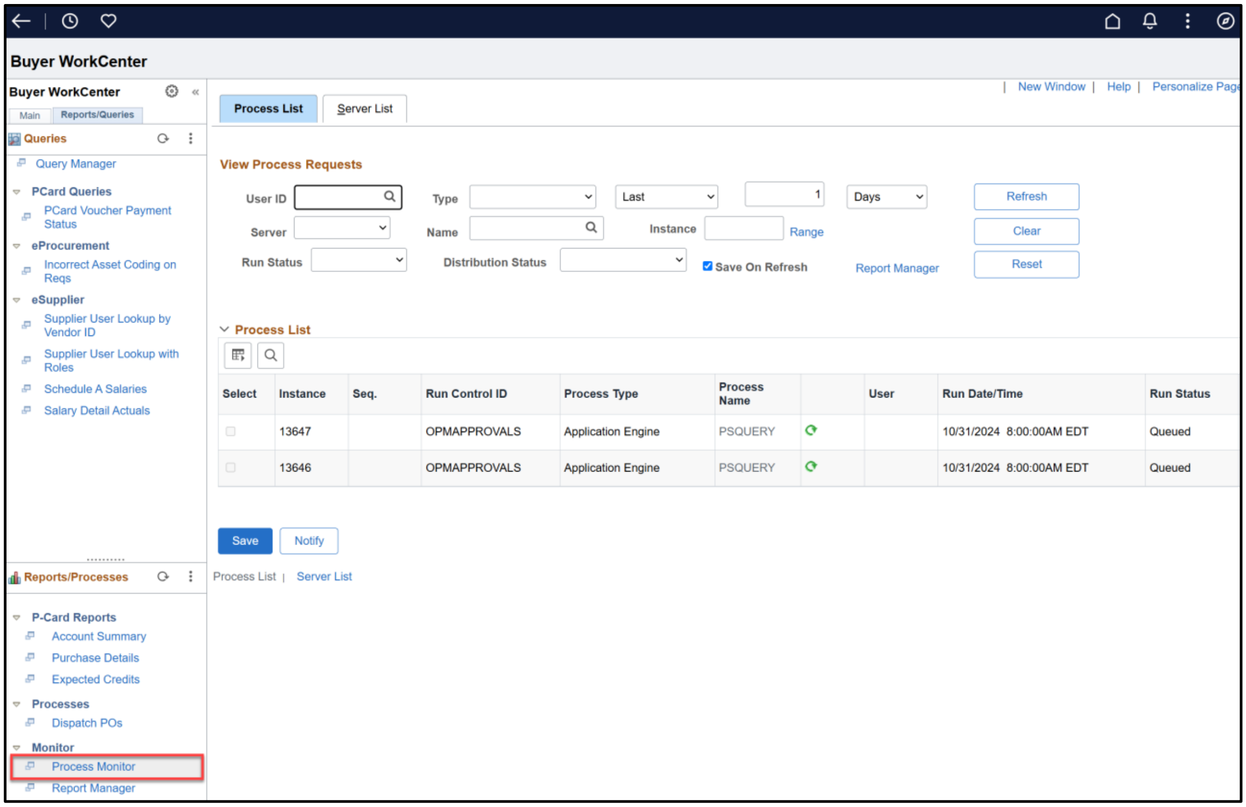
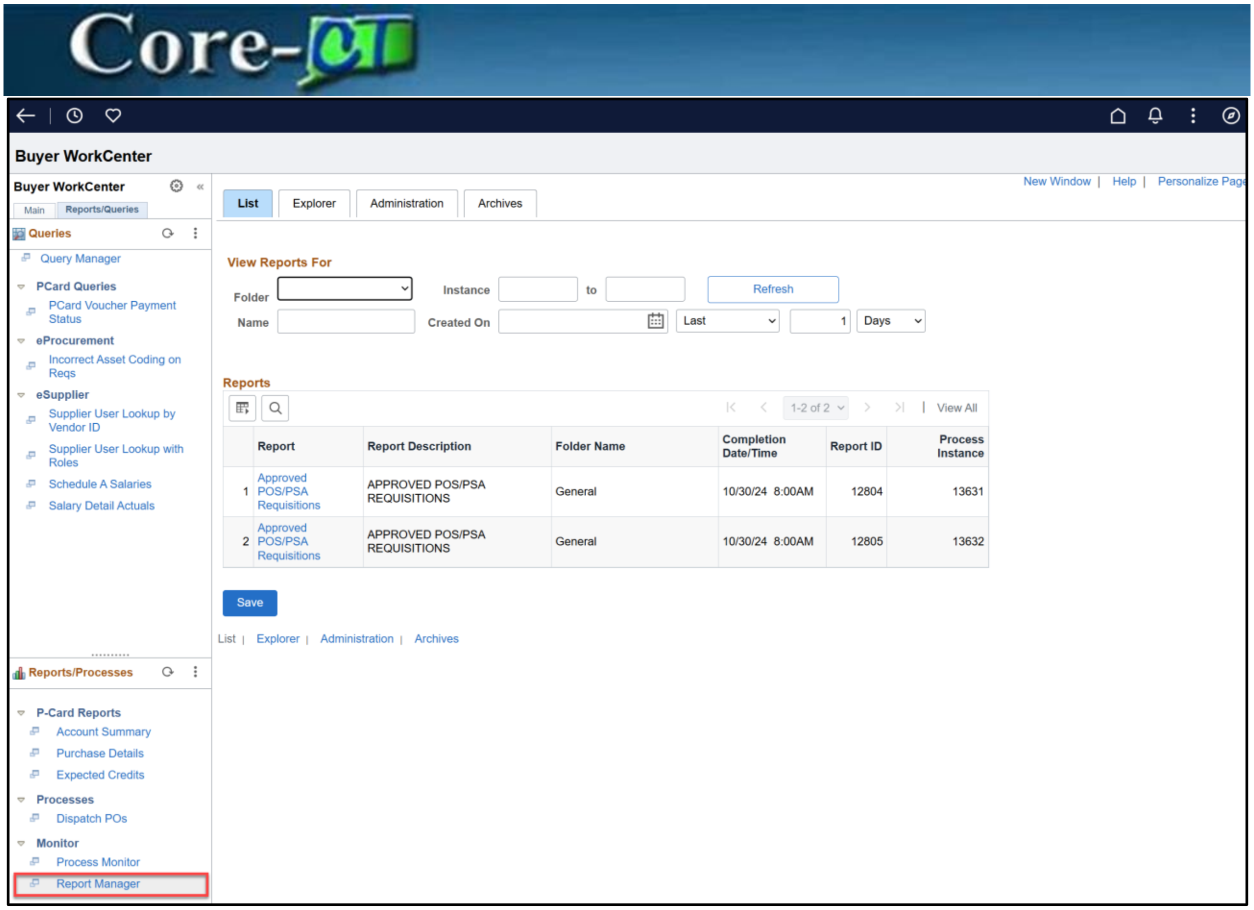
Incorrect Asset Coding on Reqs
eSupplier
Supplier User Lookup by Vendor ID
Supplier User Lookup with Roles
Schedule A Salaries
Salary Detail Actuals
New Window | Help | Personalize Page
Run Control ID 011111
Language English
Report Manager
Process Monitor
Run
Report Request Parameters
Role Name
ID
Business Unit DASM1
Card Issuer
Card Number
Date From 07/01/2007
To 07/20/2007
Save
Return to Search
Previous in List
Next in List
Notify
Add
Update/Display

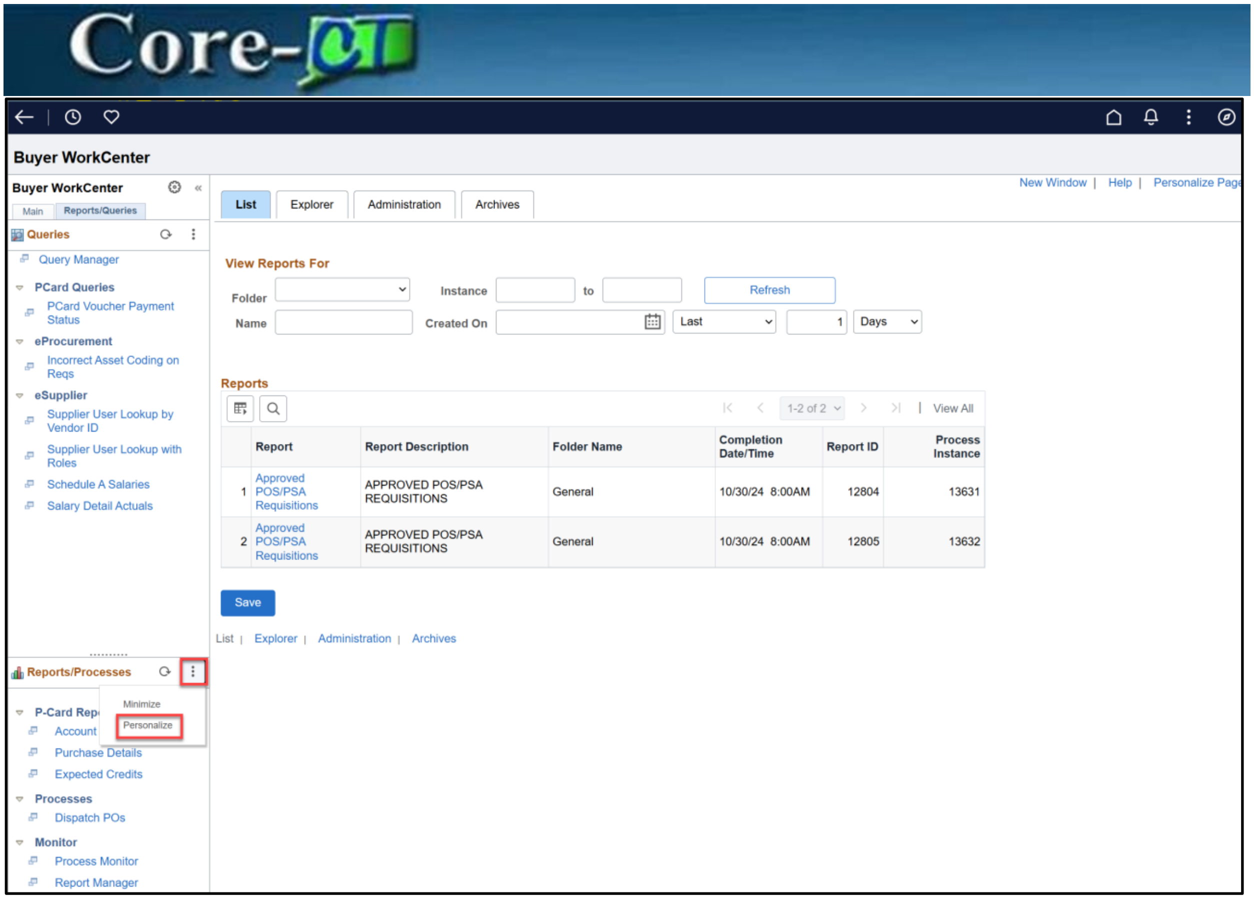
- Click the **Process Monitor** link.
- The **Process Monitor link** displays the **Process Monitor** page to review the status of any reports that have been run.



- Click the **Report Manager** link.
- The **Report Manager** link displays the **Report Manager** Page to open any reports that have been run successfully.



- The links that display in the Reports/Process section can also be personalized.
- Click the **Reports/Processes Pagelet Settings** button.
- Click the **Personalize** menu.



- Click the **Save** link, to save your changes.