



# Buyer WorkCenter

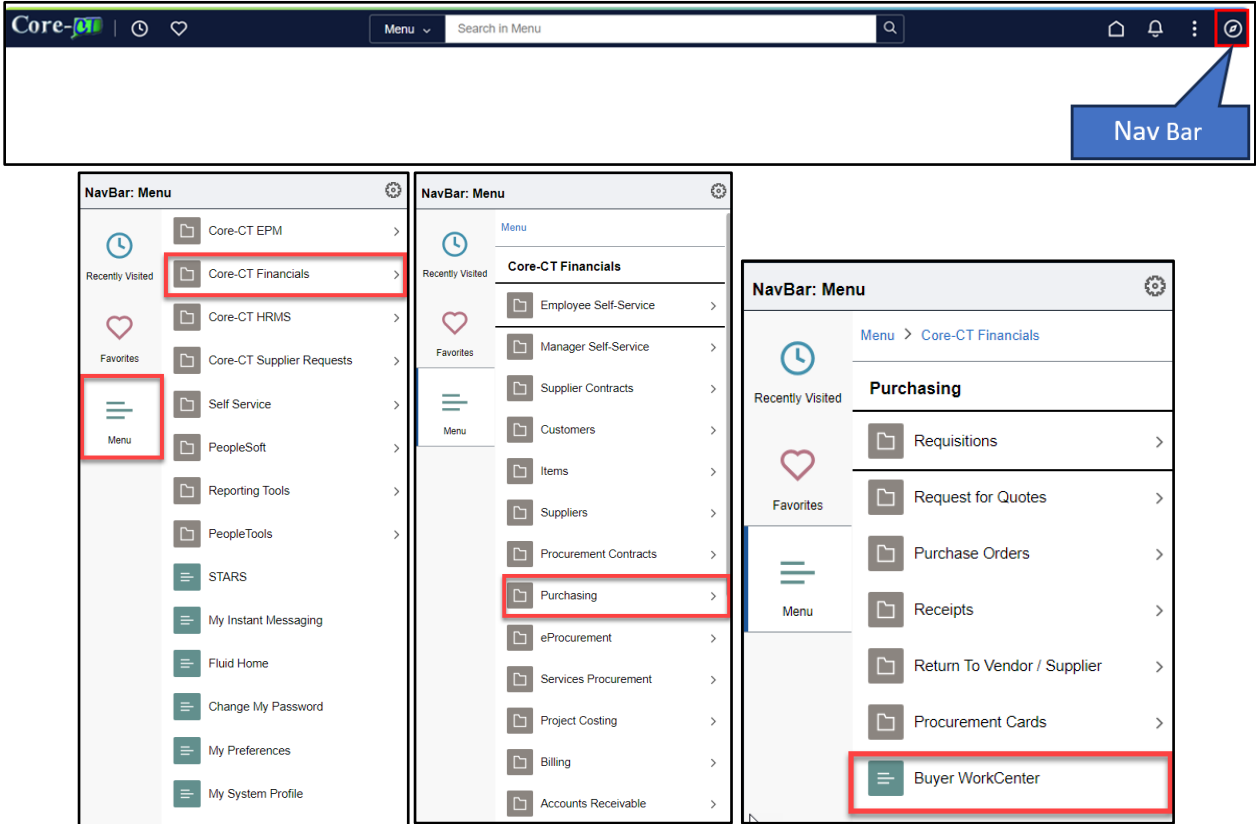
The Buyer WorkCenter is designed to be a navigational center for end users. The WorkCenter helps end users become more efficient by accessing frequently used pages and pagelets. WorkCenters are designed for specific roles and provide a singular location for access to key processes within Financial and 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:

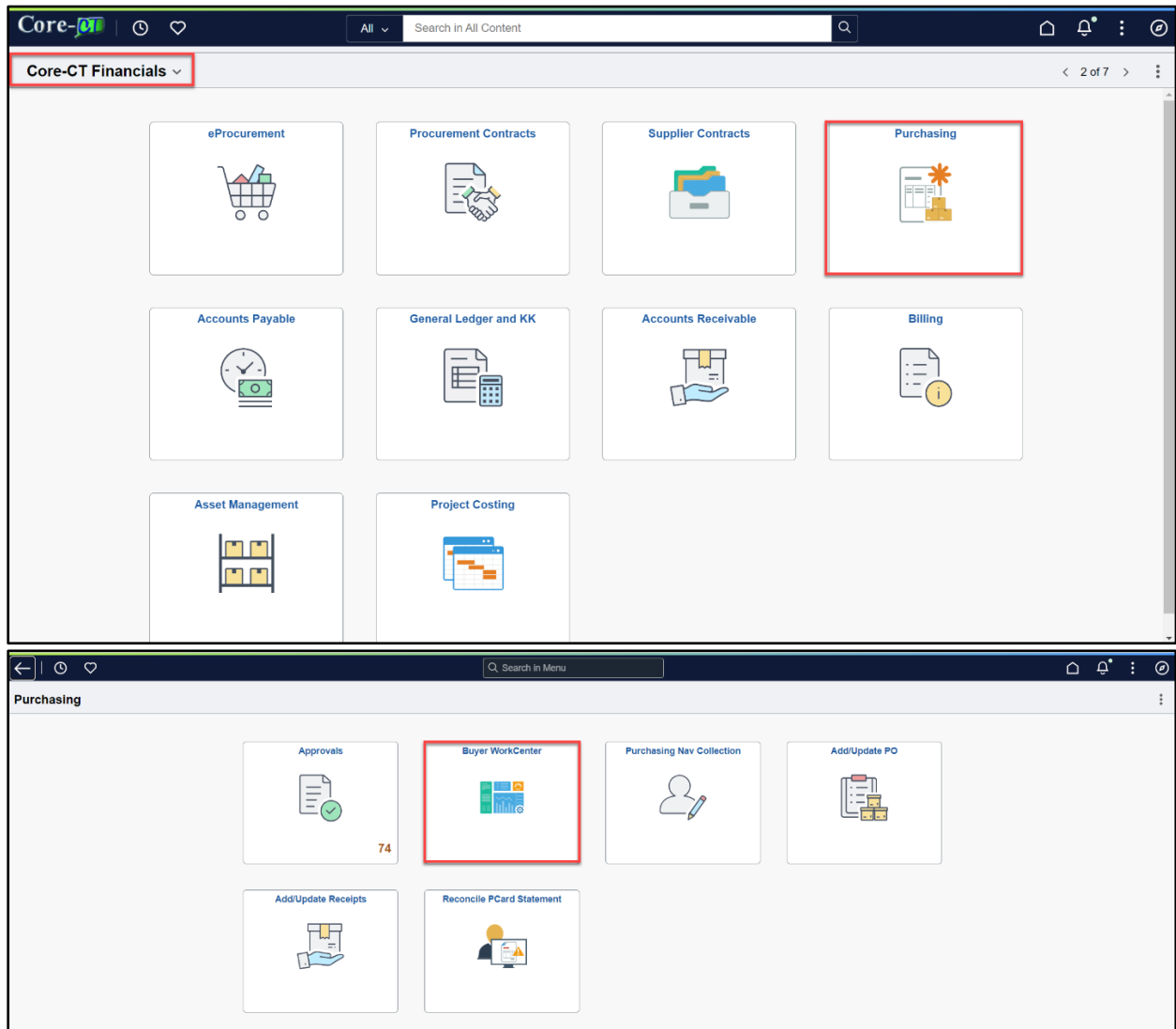
**Nav Bar > Menu > Core-CT Financials > Purchasing > Buyer WorkCenter**





Or

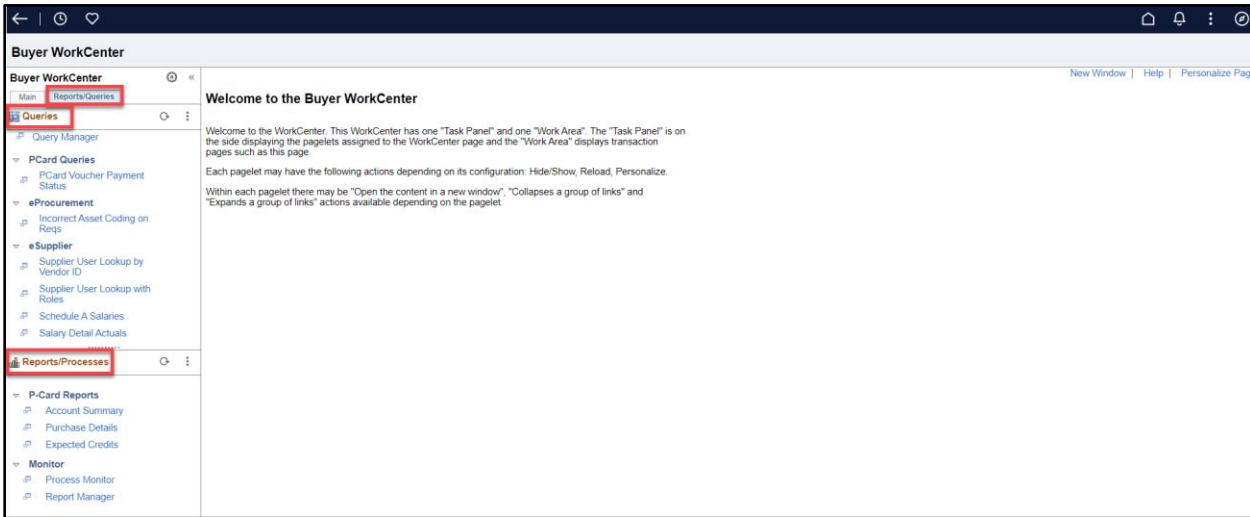
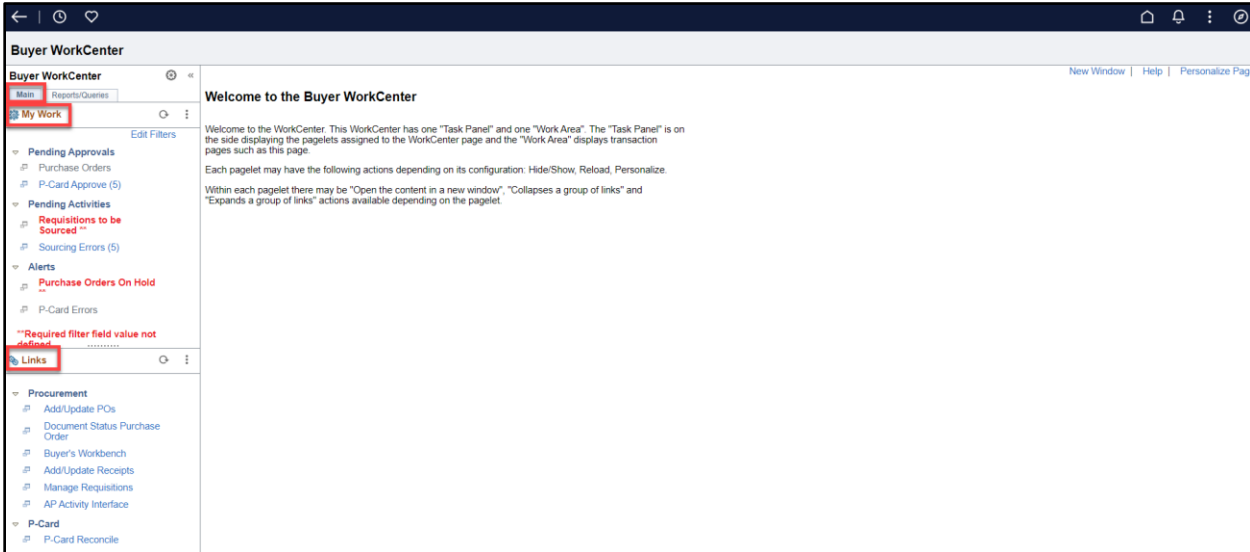
- Select **Core-CT Financials**
- Click **Purchasing** Tile
- Click **Buyer WorkCenter**





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

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

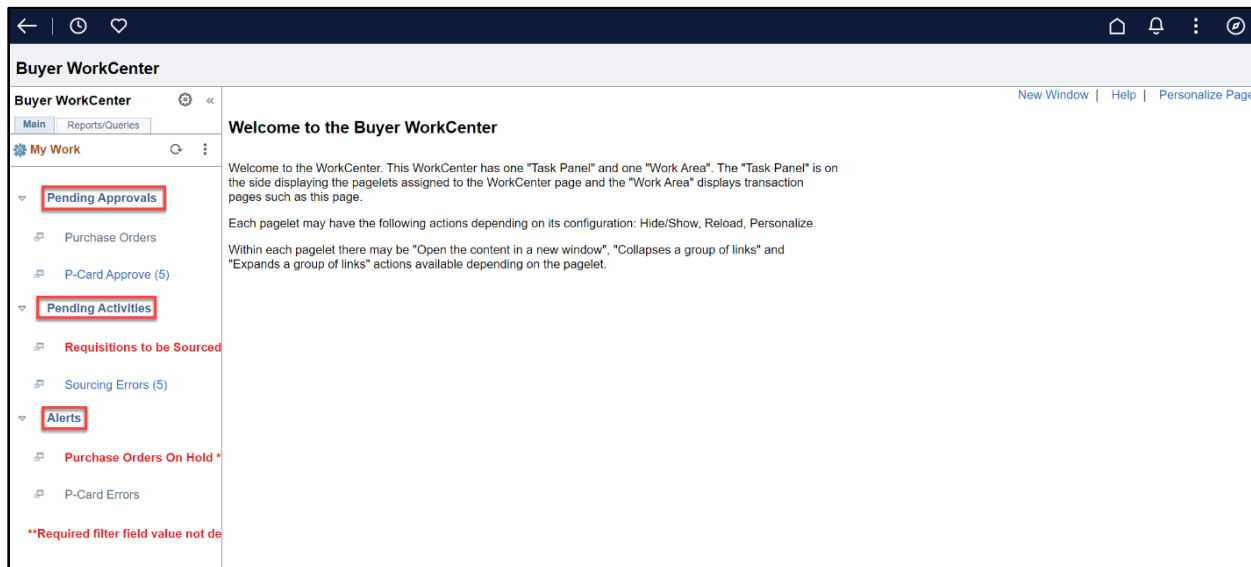




The Buyer WorkCenter allows users to access multiple pages and complete daily tasks without navigating away, saving time spent on menu navigation. It is designed to enhance productivity for a specific role by centralizing and simplifying tasks in one location.

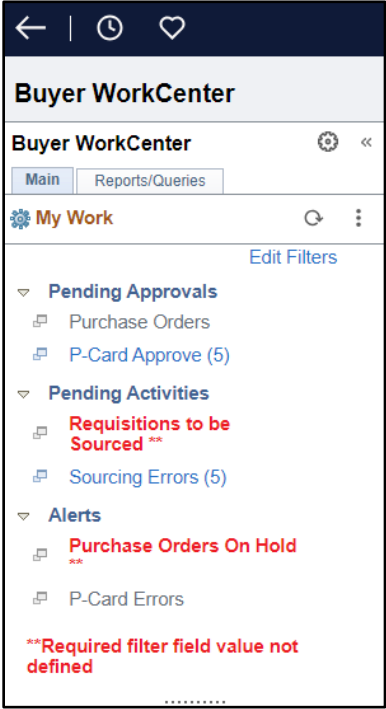
## Main

- 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.**



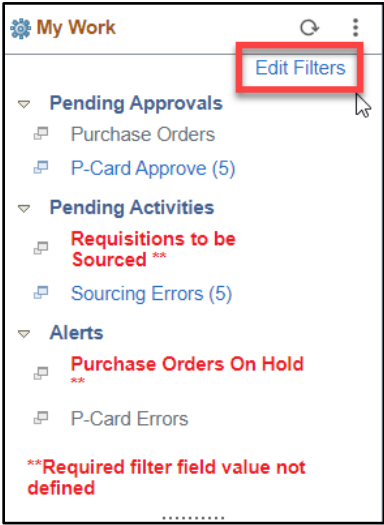


- If the links are red, it indicates that a filter needs to be defined.
- If the links are grey, it means there are no transactions.
- The number displayed represents the total number of transactions.





- 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 .

Buyer WorkCenter

Buyer WorkCenter

Main Reports/Queries


My Work Edit Filters

Configuration ID BUYER User ID Buyer WorkCenter

My Work Groups

Group Label Pending Approvals

My Work Links

Link Label	Filter ID	Description	Edit Filter
Purchase Orders	PO_2APPRV	Purchase Orders to Approve	
P-Card Approve			



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

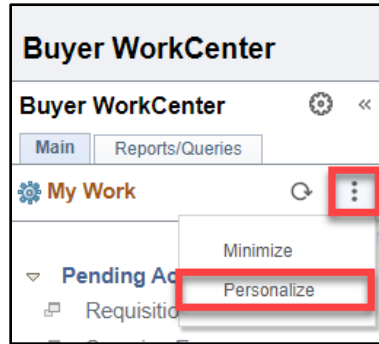
- Click  to the message.

Refresh the pagelet to see your changes. (7980,22)

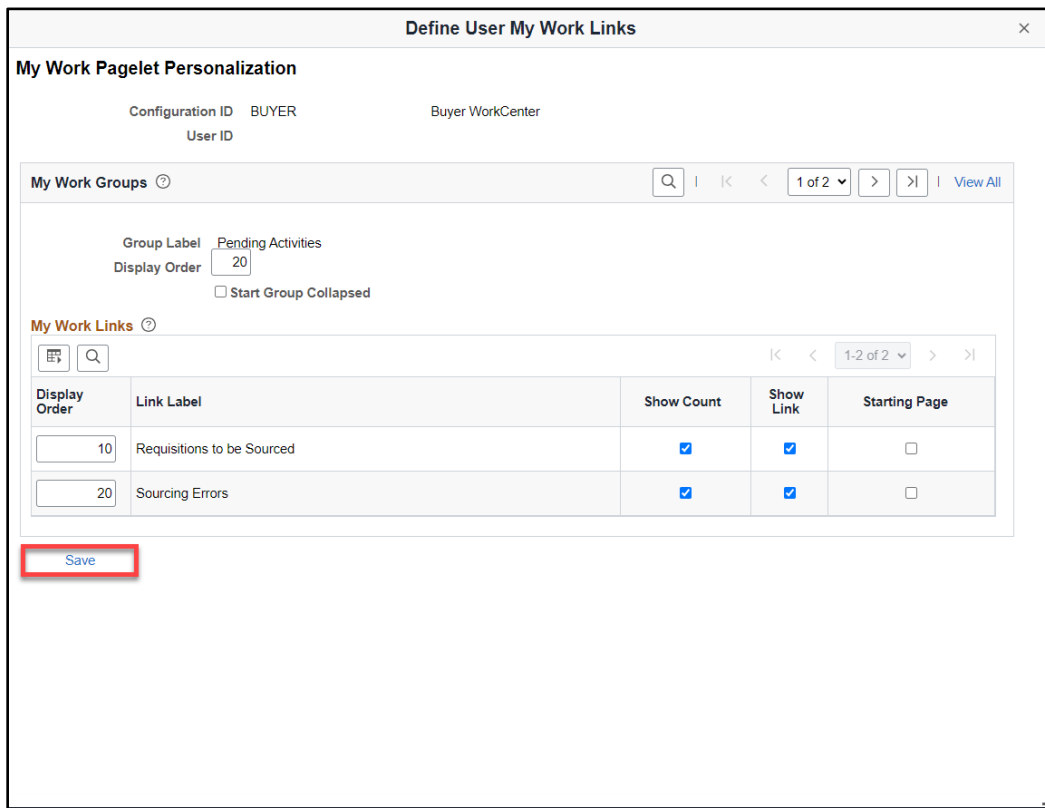
Link Label	Filter ID	Description	Edit Filter
Requisitions to be Sourced	PO_REQ2SRC	Requisitions to Source	
Sourcing Errors	PO_SRCERR	PO Sourcing Errors	



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



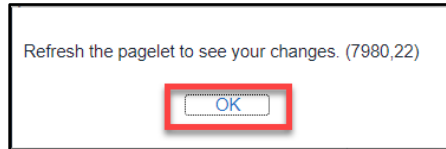
- You can remove and/or reorder the **My Work** links however you **cannot add** work links since these are based on your roles and security.
- Users can sequence the pagelets display or hide the links according to their need.
- After making changes, click the **Save** button.




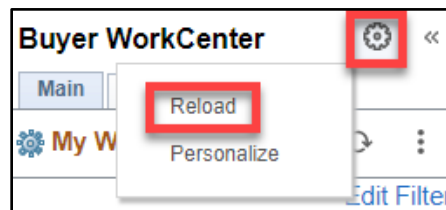




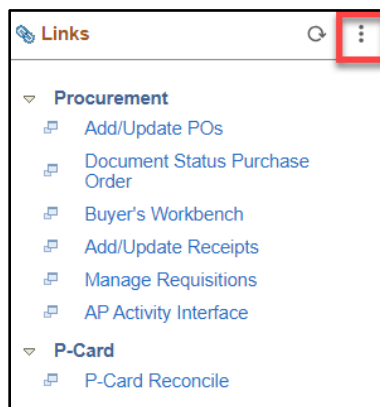
- Click OK button to the message about Refreshing the pagelet to see your changes.



- 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.

Define User "Links" Links

Links Pagelet Personalization

Configuration ID BUYER      Buyer WorkCenter  
User ID

Link Groups ?  1 of 3 [View All](#)

**Display Order** | 1  Start Group Collapsed

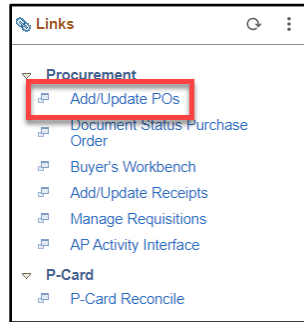
Link List ?

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window
Define	3	Add/Update POs	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	4	Document Status Purchase Order	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	6	Buyer's Workbench	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	7	Add/Update Receipts	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	10	Manage Requisitions	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

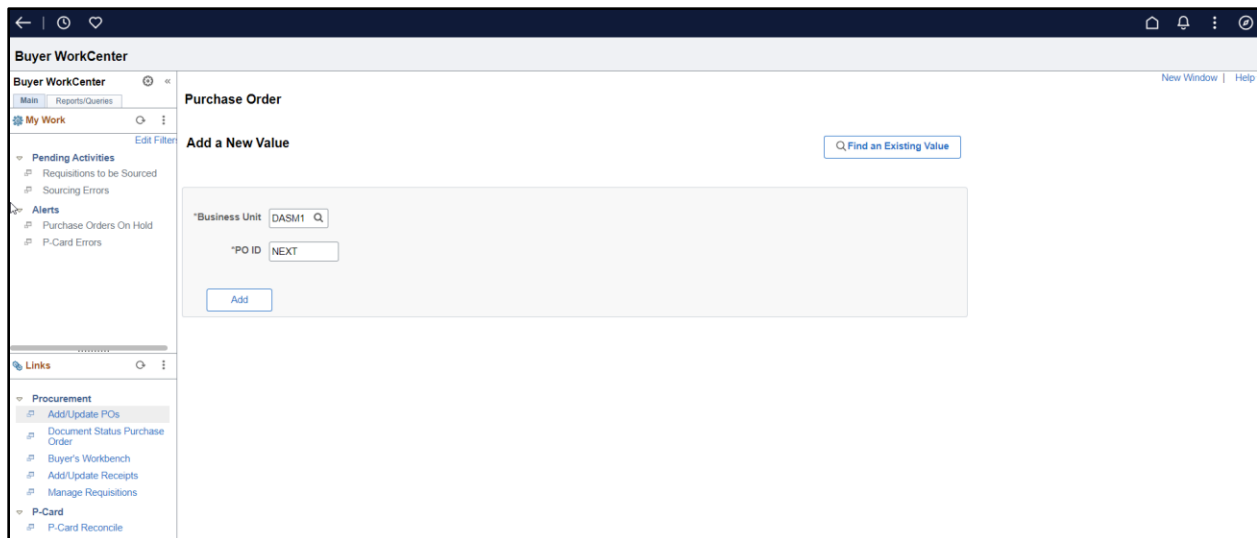
**Save**



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

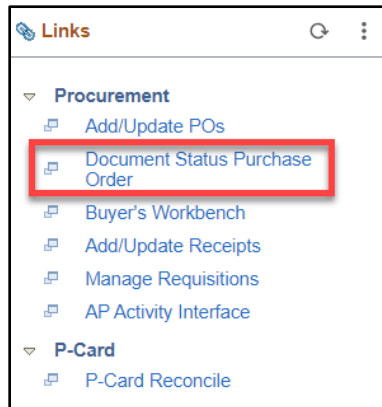


- The **Add/Update PO** link displays the PO page which provides the ability to search for an existing PO or adding a new PO without having to navigate to the page using the menu.

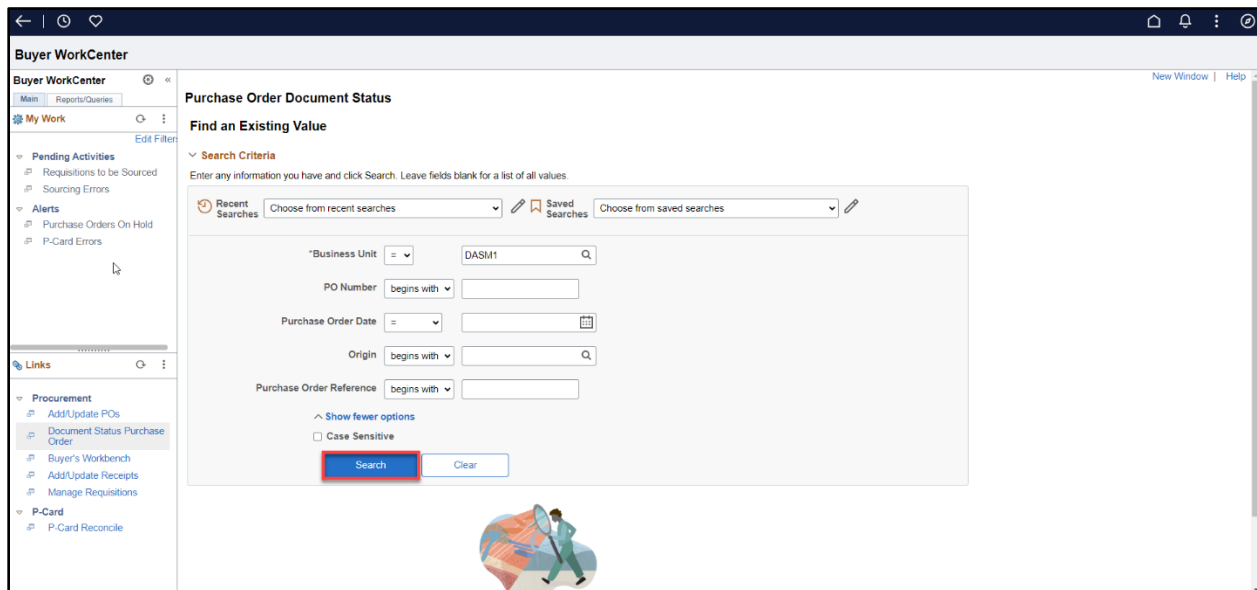




- Click the **Document Status Purchase Order** link.



- 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.

Main
Reports/Queues

My Work
↻ ⋮

Edit Filters

Pending Activities

- 📄 Requisitions to be Sourced
- 📄 Sourcing Errors

Alerts

- 📄 Purchase Orders On Hold
- 📄 P-Card Errors

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Links
↻ ⋮

Procurement

- 📄 Add/Update POs
- 📄 Document Status Purchase Order
- 📄 Buyer's Workbench
- 📄 Add/Update Receipts
- 📄 Manage Requisitions

P-Card

- 📄 P-Card Reconcile

Search Results

Only the first 300 results of a possible 21032 can be displayed. Business Unit "DASM1"

⏪ <
1-10 of 300
> ⏩
| View 100

Business Unit	PO Number	Purchase Order Date	Origin	Purchase Order Reference	>
DASM1	0000021095	10/10/2024	134	Non-Priority Single Applicatio	>
DASM1	0000021094	10/09/2024	109	(blank)	>
DASM1	0000021093	10/09/2024	113	(blank)	>
DASM1	0000021092	10/01/2024	134	Priority Application Invitatio	>
DASM1	0000021091	09/30/2024	113	(blank)	>
DASM1	0000021090	09/26/2024	113	(blank)	>
DASM1	0000021089	09/26/2024	113	(blank)	>
DASM1	0000021088	09/26/2024	113	KIM_CORP_TEST	>
DASM1	0000021087	09/17/2024	106	DASM1 0000005025	>
DASM1	0000021086	08/20/2024	106	DASM1 0000005025	>



- 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.

The screenshot shows the Buyer WorkCenter interface. At the top, it displays business unit information: Business Unit DASH1, Document Date 09/26/2024, Currency USD, Buyer DAS, PO ID 0000021088, Status Dispatched, Document Type Purchase Order, Merchandise Amt 250.00, and Budget Status Valid. Below this is a process flow diagram with icons for Requisitions, Sourcing Events, Procurement Contracts(1), Purchase Orders, Service Work Orders, Receipts(1), Returns, Vouchers(1), and Payments. A 'Show All' button is visible. The 'Associated Document' section contains a table with the following data:

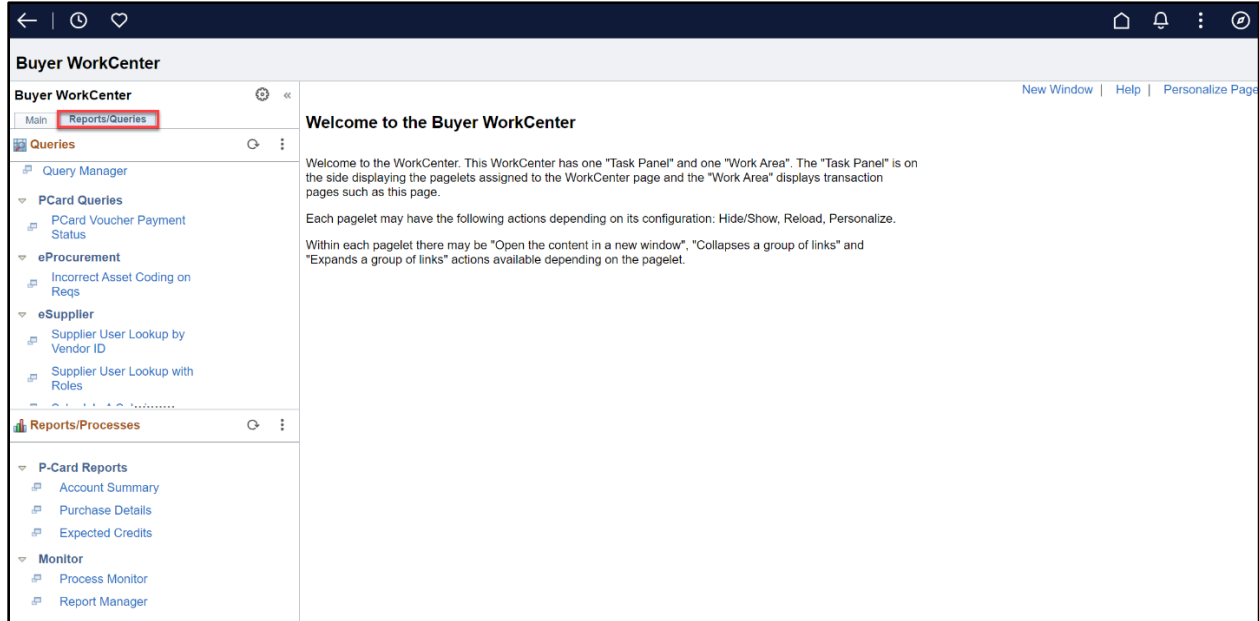
Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
∨Actions	STATE		Contract	<a href="#">KIM_CORP</a>	Approved	09/26/2024	0000010008		
∨Actions		DASH1	Receipt	0000091314	Received	09/26/2024	0000010008	MAIN	
∨Actions		DASH1	Voucher	00136670	Posted	09/26/2024	0000010008	MAIN	

The 'Voucher' row is highlighted with a red border. A 'Return to Search' button is located at the bottom left of the table area.

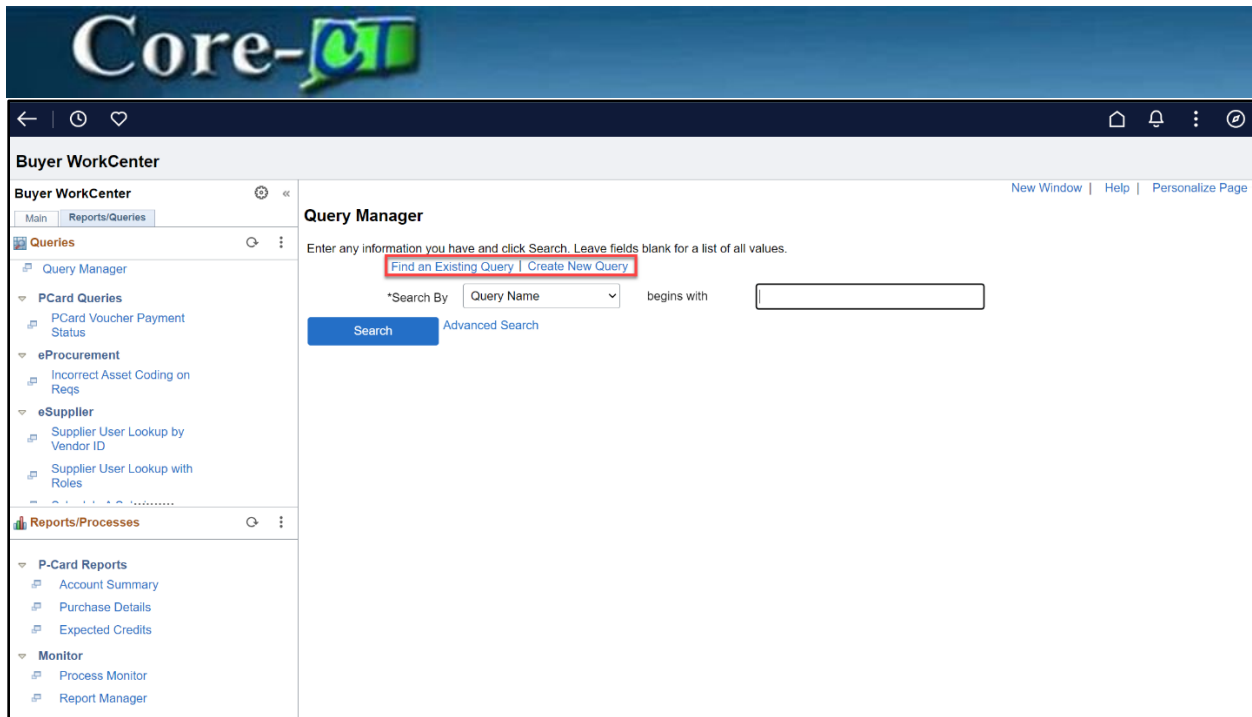
➤ Query Manager



- Click **Reports/Queries** tab.

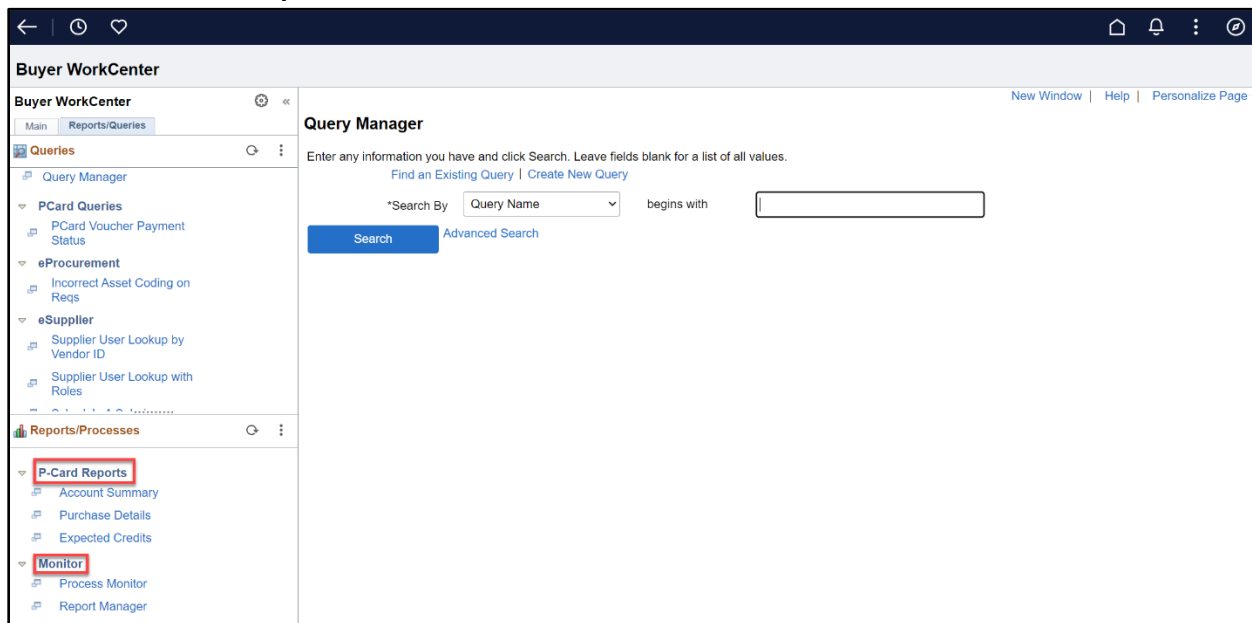


- Click **Query Manager**.
- The **Queries** section includes links to **Query Manager**, public and private queries, and pivot grids.
- When a link is selected, the query or pivot grid results are displayed in the right pane of the WorkCenter or in a new window. Query results can be saved to Microsoft 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**.

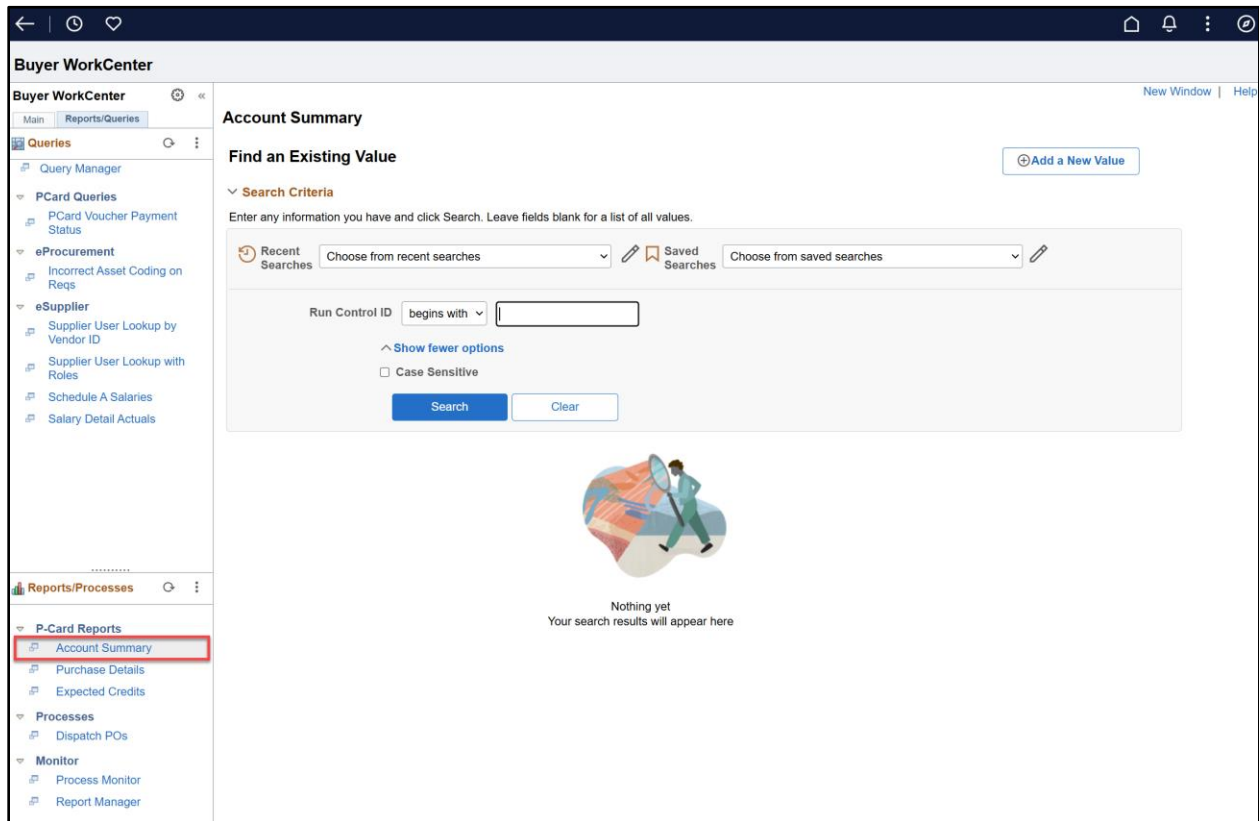


- Click the **Account Summary** link.





- 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.

The screenshot shows the 'Buyer WorkCenter' interface. On the left is a navigation menu with categories like 'Queries', 'P-Card Reports', 'Processes', and 'Monitor'. The main area is titled 'Account Summary' and contains a search section 'Find an Existing Value'. Under 'Search Criteria', there are dropdowns for 'Recent Searches' and 'Saved Searches'. A search criteria field is set to 'Run Control ID begins with' with an empty input box. Below this are 'Search', 'Clear', and 'Save Search' buttons. The 'Search Results' section shows '2 results' in a table:

Run Control ID	
000	>
011111	>

This screenshot shows the 'Report Request Parameters' form in the Buyer WorkCenter. At the top, it displays 'Run Control ID 011111' and 'Language English'. There are buttons for 'Report Manager', 'Process Monitor', and 'Run'. The form fields include:

- Role Name: dropdown menu
- ID: text input with search icon
- Business Unit: 'DASM1' with search icon
- Card Issuer: text input with search icon
- Card Number: text input
- Date From: '07/01/2007' with calendar icon
- To: '07/20/2007' with calendar icon

At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', and '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.

The screenshot shows the Buyer WorkCenter interface. The left sidebar contains a navigation menu with categories like Queries, P-Card Reports, and Monitor. The 'Process Monitor' link under the Monitor category is highlighted with a red box. The main content area is titled 'View Process Requests' and includes search filters for User ID, Type, Last, Days, Server, Name, Instance, Range, Run Status, and Distribution Status. Below the filters is a table with the following data:

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status
<input type="checkbox"/>	13647		OPMAPPROVALS	Application Engine	PSQUERY		10/31/2024 8:00:00AM EDT	Queued
<input type="checkbox"/>	13646		OPMAPPROVALS	Application Engine	PSQUERY		10/31/2024 8:00:00AM EDT	Queued

Buttons for 'Save', 'Notify', 'Refresh', 'Clear', and 'Reset' are also visible.

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

The screenshot displays the Buyer WorkCenter interface. The top navigation bar includes 'List', 'Explorer', 'Administration', and 'Archives'. The left sidebar shows a tree view of navigation options: 'Queries' (Query Manager, PCard Queries, eProcurement, eSupplier) and 'Reports/Processes' (P-Card Reports, Processes, Monitor). The 'Report Manager' link under 'Monitor' is highlighted with a red box. The main content area shows 'View Reports For' filters and a table of reports.

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	Approved POS/PSA Requisitions	General	10/30/24 8:00AM	12804	13631
2	Approved POS/PSA Requisitions	General	10/30/24 8:00AM	12805	13632

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

**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

Account | Personalize

Purchase Details

Expected Credits

Processes

- Dispatch POs

Monitor

- Process Monitor
- Report Manager

**View Reports For**

Folder: [ ] Instance: [ ] to [ ] Refresh

Name: [ ] Created On: [ ] Last: [ ] 1 Days

**Reports**

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	Approved POS/PSA Requisitions	General	10/30/24 8:00AM	12804	13631
2	Approved POS/PSA Requisitions	General	10/30/24 8:00AM	12805	13632

Save

List | Explorer | Administration | Archives

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

**Define User "Reports" Links**

Reports/Processes Pagelet Personalization

Configuration ID: BUYER Buyer WorkCenter  
User ID

**Link Groups**

\*Group Label: P-Card Reports

Display Order: [ 1 ]

Start Group Collapsed

**Link List**

Define Link	Display Order	Link Label	Link Type	Run Control ID	Show Link	Starting Page	Open in New Window
Define	1	Account Summary	Menu Item	[ ]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	2	Purchase Details	Menu Item	[ ]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Define	3	Expected Credits	Menu Item	[ ]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save