

Accounts Payable WorkCenter

The Accounts Payable WorkCenter is designed to be a navigational center for end users. The New Core-CT Fluid functionality provides new ways to organize and navigate to some of your most commonly used pages. The Accounts Payable WorkCenter features a revamped Fluid look which helps end users become more efficient by accessing frequently used pages and pagelets, based on their accounts payable security roles. This job aid walks users through the basic functionalities of the new fluid Accounts Payable WorkCenter.

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 <u>WorkCenter Personalization</u> job aid.

Accounts Payable WorkCenter

Navigation:

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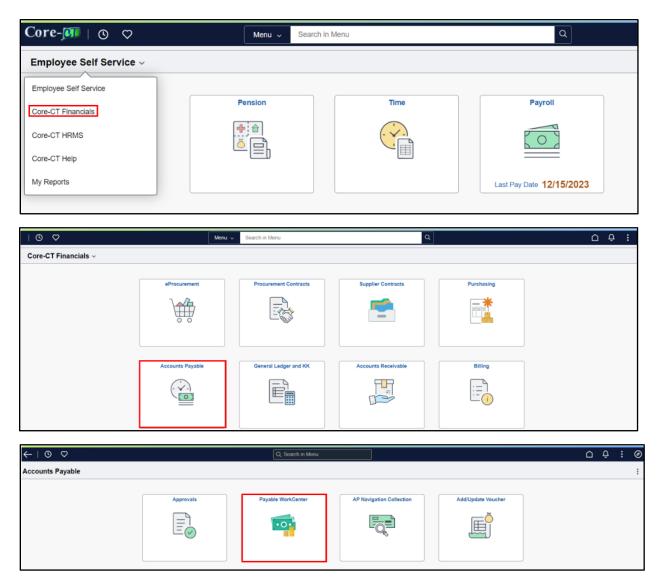
Nav Bar > Menu > Accounts Payable > Accounts Payable WorkCenter

Or

Select Core-CT Financials

Select Accounts Payable Tile

Click Accounts Payable WorkCenter



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Budget Check Errors	51																			

> Using the Accounts Payable WorkCenter

> To refresh the page, click the **Refresh** button located in the upper left-hand corner.

Welcome to WorkCenter	
⊖ Θ	Welcome to WorkCenter WorkCenter Page
> Links	
> Queries	
> Reports/Processes	

To minimize the Account Payable WorkCenter, click the Minimize button located in the middle of the left-hand Navigation Bar.

Welcome to WorkCenter	
C• 🔘 > My Work	Welcome to WorkCenter WorkCenter Page
> Links	
> Queries	
> Reports/Processes	
	I) Minimize

> My Work.

The **My Work** dropdown includes links to pages that an end user would need to access daily with counts related to the number of documents for each. Additionally, it can include exceptions, where the user must take action.

> Vouchers, Matching, Approval, Budget Check, and Payments.

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> Links.

The Links dropdown includes additional links to pages, or other areas of interest, for the user.

> Vouchers, Payments, and Supplier.

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Purchase Order Inquiry	Supplier Location	Q				
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Payments 🗸	Invoice Number					
Pay Cycle Manager						
Payment	Invoice Date					
Supplier 🗸	Gross Invoice Amount	0.00				

> Queries.

The **Queries** section includes links to **Query Manager**, public and private queries, and pivot grids.

- Click Query Manager.
 - Using the **Search** function, users can pull up existing queries.
 - Users may also click the Find an Existing Query link.
 - Note: Only Central agency users can **Create New** Query. This functionality is NOT for EPM Queries.
- > Pivot Grids, Queries, Forms, FYE Scorecards

	we and click Search.	Leave fields blank for a list of	all values.	
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> Click **Pivot Grids**, then click **P-Card Transactions' Status**.

Query Manager	
ට ට > My Work	Query Manager
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√ Queries	*Search By Query Name begins with
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> Reports/Processes	

> Click the **Minimize** button.

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	02/10/2020 (11284)		DCCM1	0	0	1	145.400	2	49.890	0	0

Pivot grids are data visualization tools used to summarize, analyze, and present large datasets in a structured format. They allow users to dynamically rearrange and aggregate data along different dimensions, such as rows, columns, and layers, to gain insights and identify patterns within the dataset.

This **Pivot Grid** is demonstrating the status on P-Card Transactions between various **Business Units**.

To change the values, drag and drop data values into the **Rows** and **Columns**.

> Delete **Business Unit** from rows.

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	More	CSLM1	0	0	5250	1725439.430	7	1723.440	1	16.950

> Drag and drop **Bill Dt** into rows.

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Now the pivot grid demonstrates the status of the transactions depending on the date.

- > Select settings to reveal additional menu options:
- Update Filters
- Export Data
- Export Filtered Data
- Threshold Options
- Save
- Save as
- Add to Homepage

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> Expand the left-hand navigation pane.

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02/10/2020 (11284)			0	0	11284	2905631,790	0	0	
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> Expand **Reports/Processes**.

The **Reports/Processes** dropdown stores different reports and processes users may need to perform daily. This includes the Process Monitor and the Report Manager links.

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