Note: *Some screenshots and link labels may differ from what you see today. As development continues, these items will be tracked and updated as time goes.*

Billing WorkCenter

The Billing 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 Billing WorkCenter features a revamped Fluid look which helps end users become more efficient by accessing frequently used pages and pagelets, based on their billing security roles. This job aid walks users through the basic functionalities of the new fluid Billing 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* WorkCenter Personalization *job aid.*

Billing WorkCenter

Navigation:

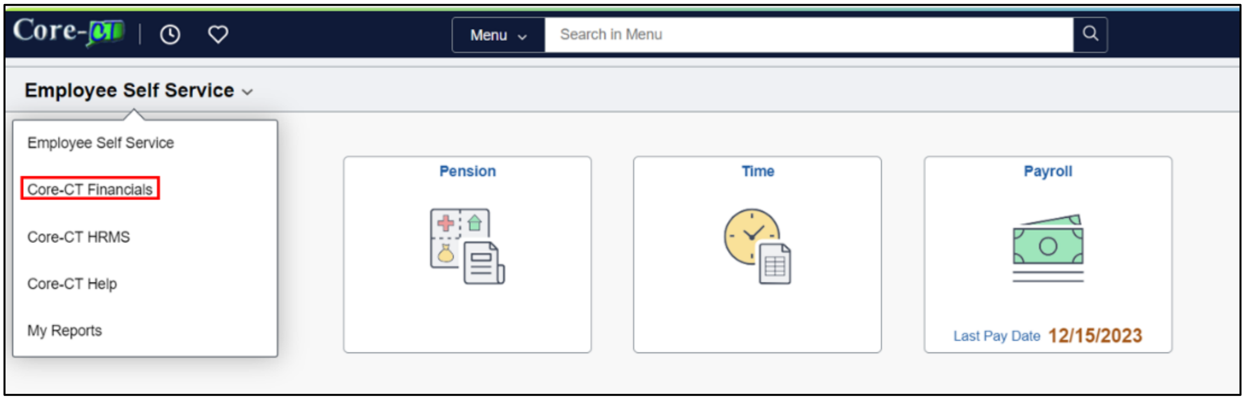
Nav Bar > Menu > Billing > Billing WorkCenter

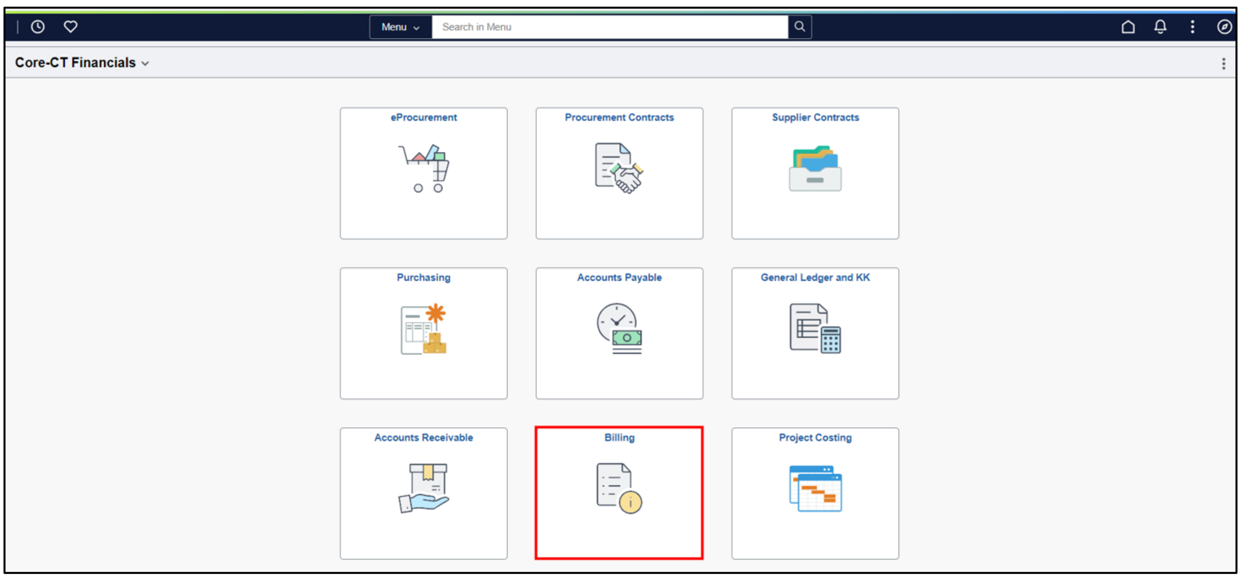
Or

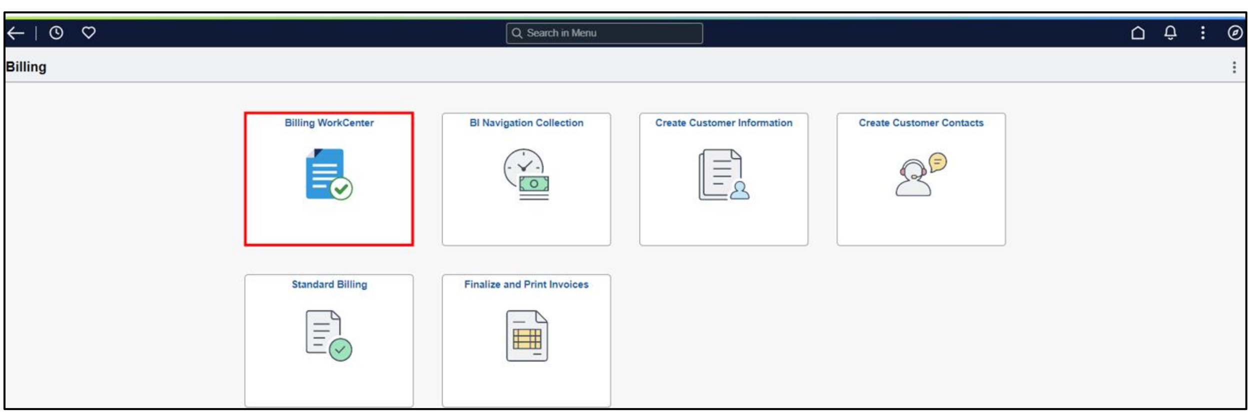
Select ***Core-CT Financials***

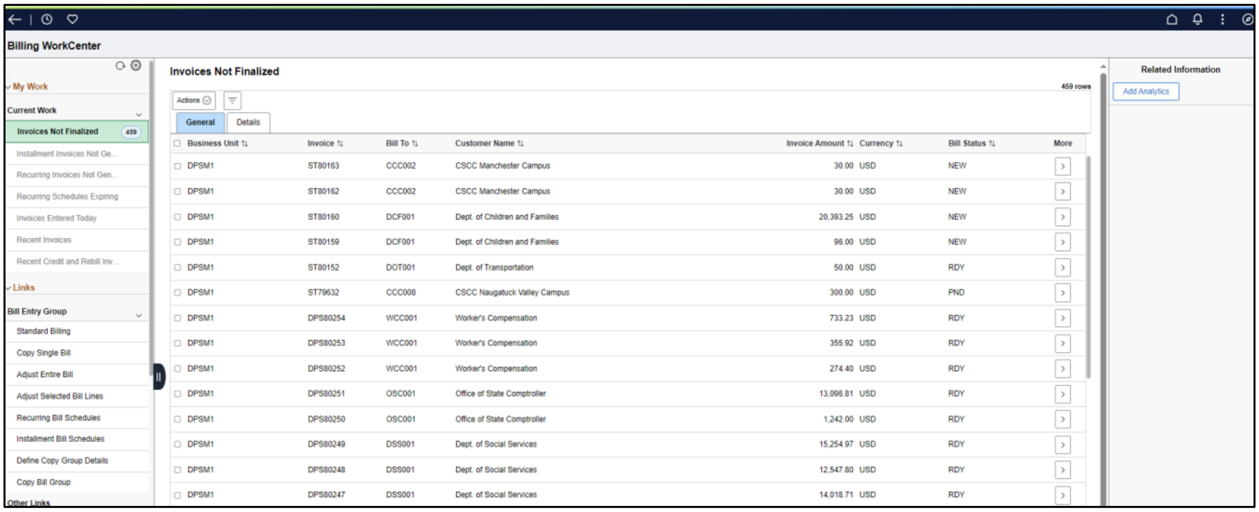
Click ***Billing*** *Tile*

Click ***Billing WorkCenter***

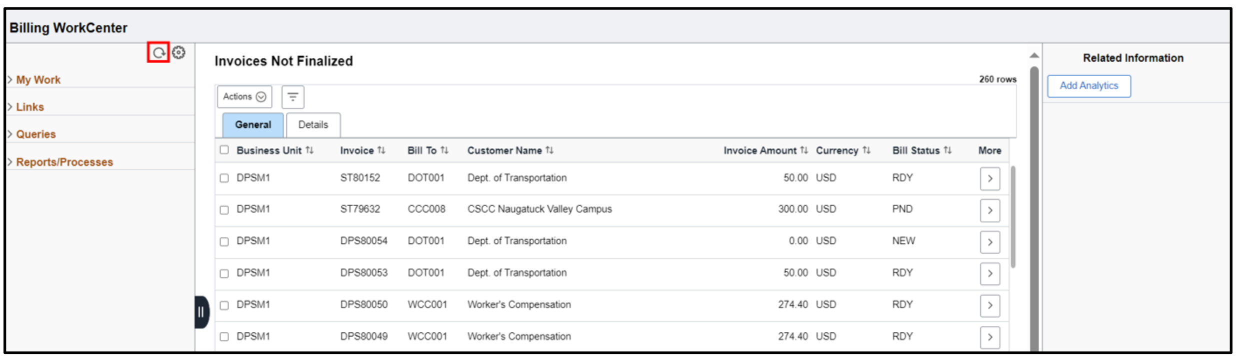

Menu
Search in Menu
Employee Self Service
Employee Self Service
Core-CT Financials
Core-CT HRMS
Core-CT Help
My Reports
Pension
Time
Payroll
Last Pay Date 12/15/2023


Menu
Search in Menu
Core-CT Financials
eProcurement
Procurement Contracts
Supplier Contracts
Purchasing
Accounts Payable
General Ledger and KK
Accounts Receivable
Billing
Project Costing

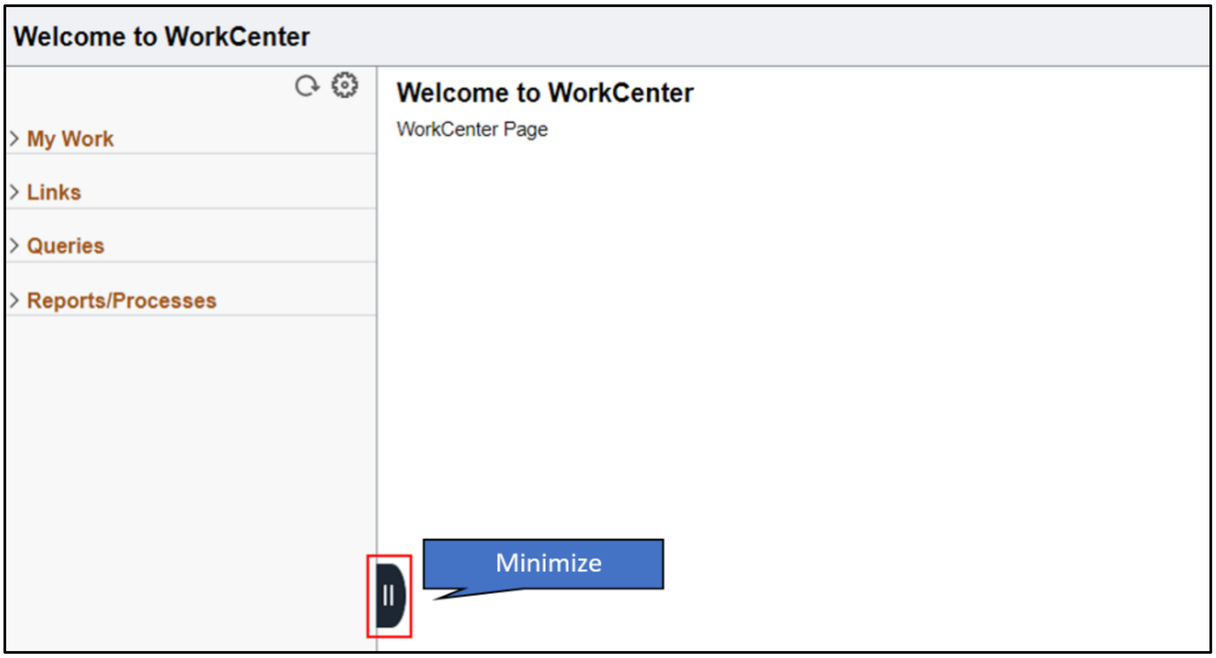

Search in Menu
Billing
Billing WorkCenter
BI Navigation Collection
Create Customer Information
Create Customer Contacts
Standard Billing
Finalize and Print Invoices



- ➢ **Using the Billing WorkCenter**
- ➢ To refresh the page, click the **Refresh** button located in the upper left-hand corner.



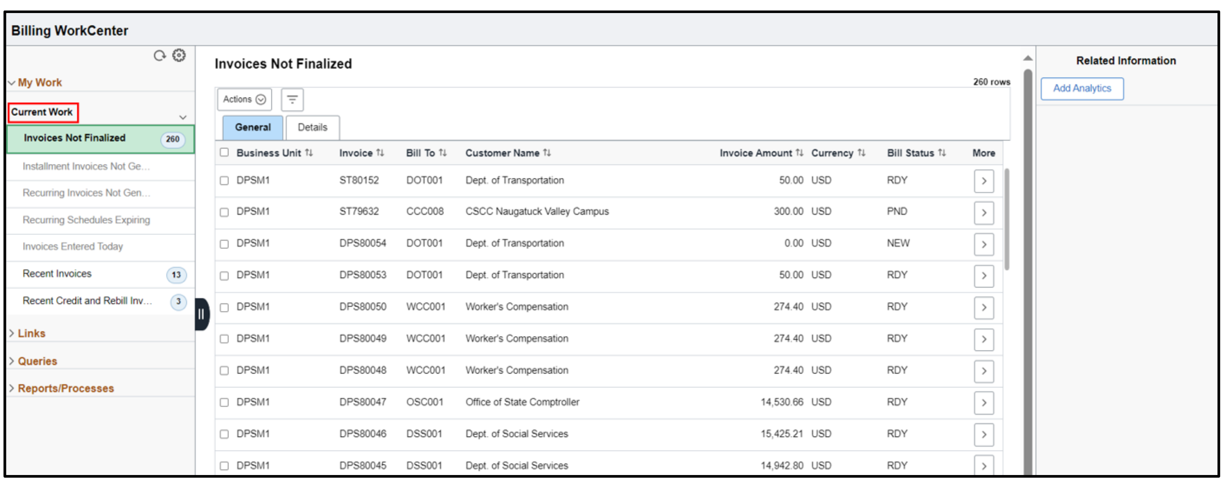
- ➢ To minimize the **Billing WorkCenter**, click the **Minimize** button located in the middle of the left-hand **Navigation Bar**.



- **My Work**.

The **My Work** dropdown includes links to pages that an end user would need to access daily. Additionally, it can include exceptions and alters, where the user must take action.

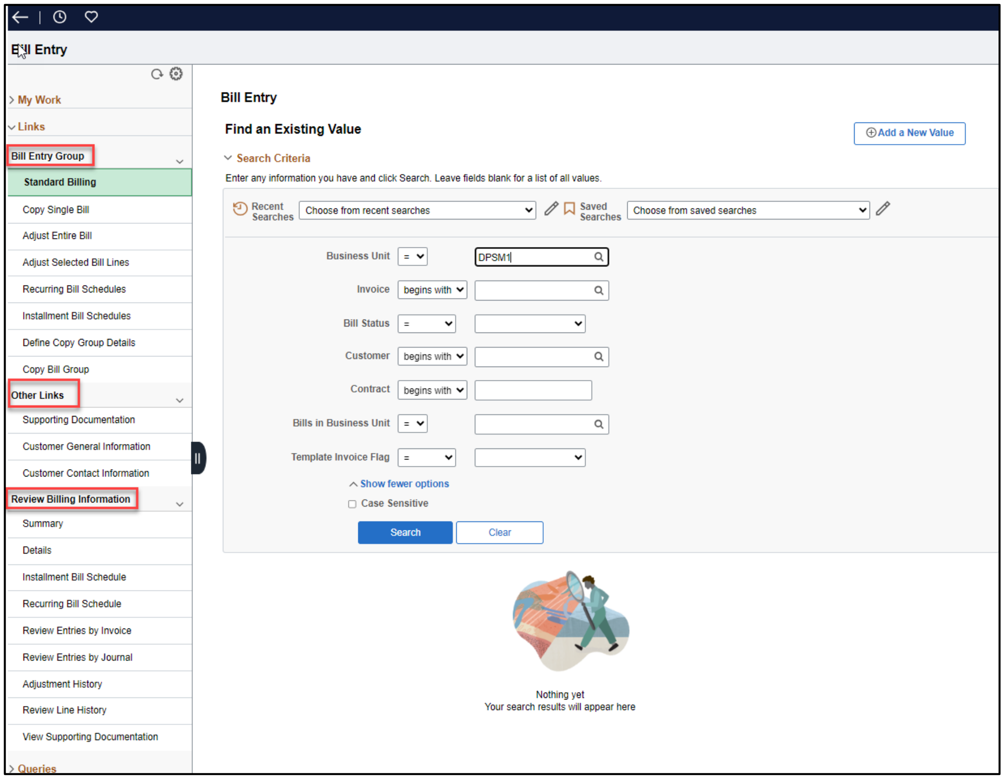
- **Current Work**.



- **Links**.

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

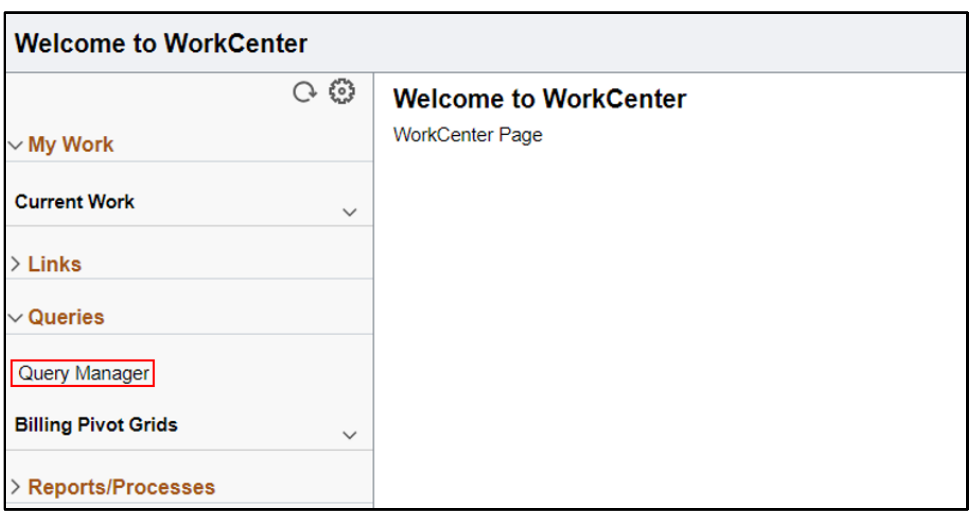
- **Bill Entry Group**, **Other Links**, and **Review Billing Information**.



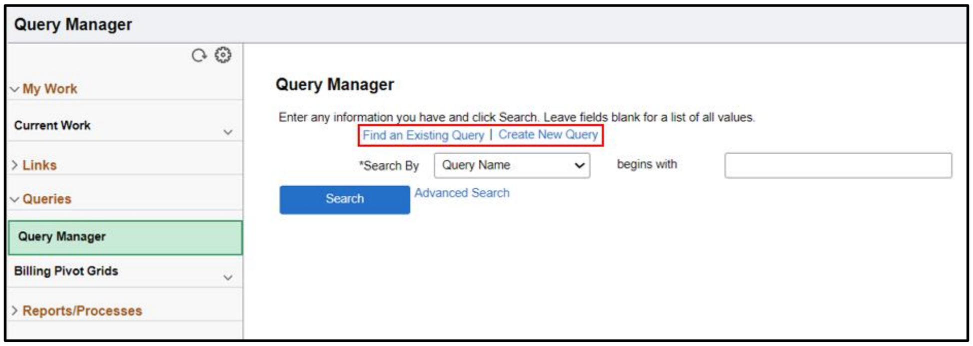
➢ **Queries**.

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

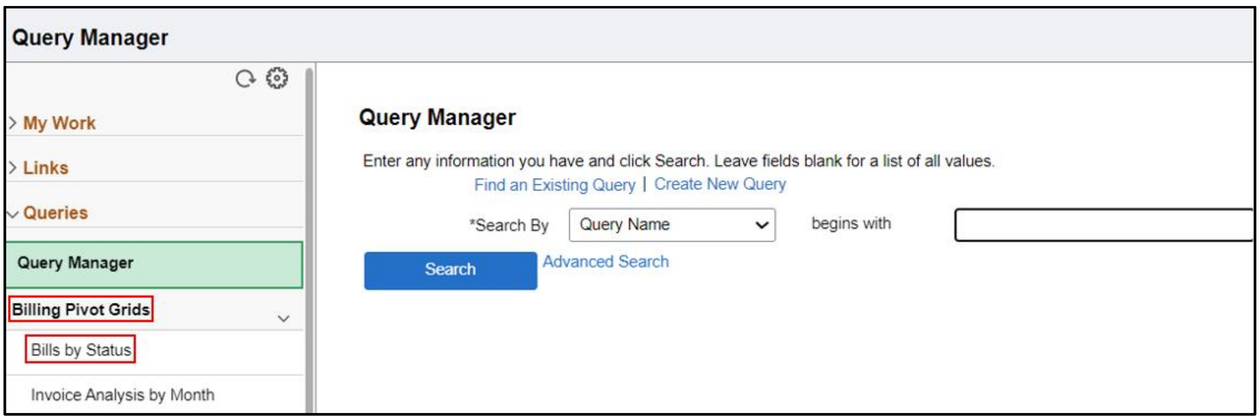
➢ **Query Manager**.



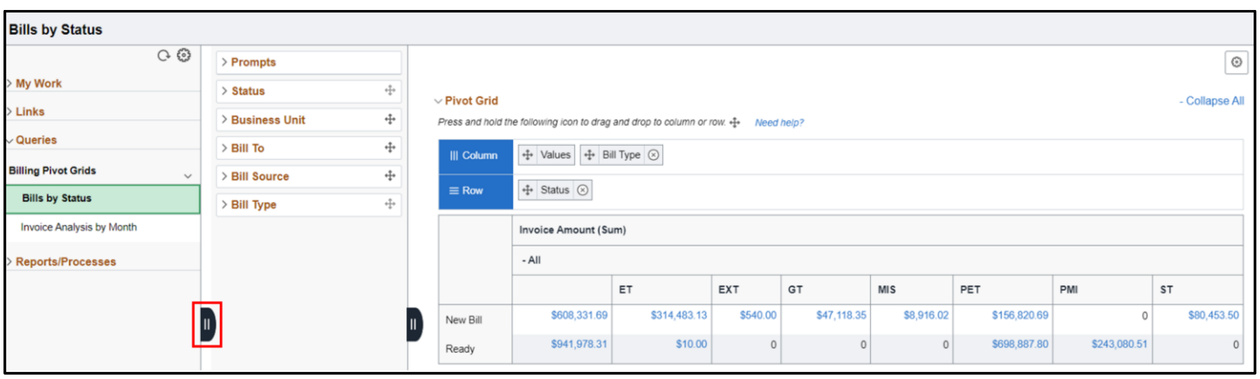
- Using the **Search** function, users can pull up existing queries.
- Users may also click the **Create New Query** instead of the **Find an Existing Query** link.



➢ Click **Billing Pivot Grids**, then click **Bills by Status**.



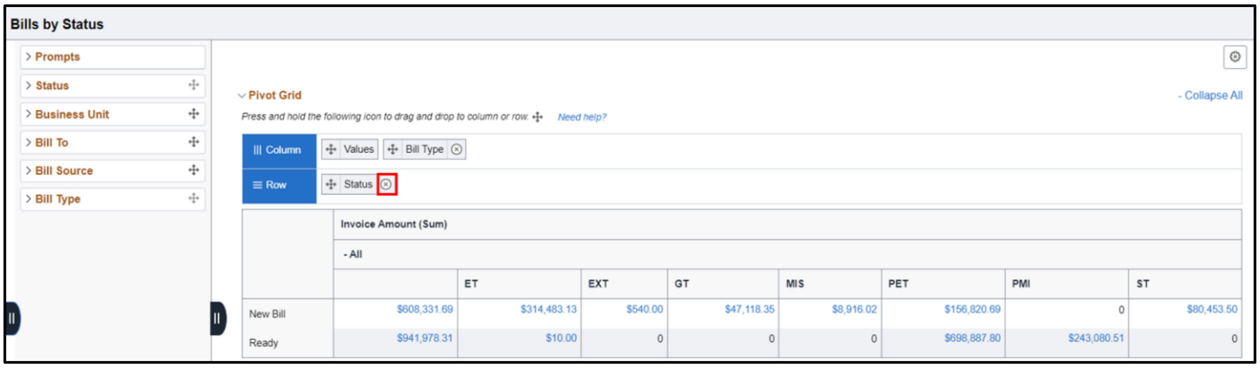
➢ Click the **Minimize** button.



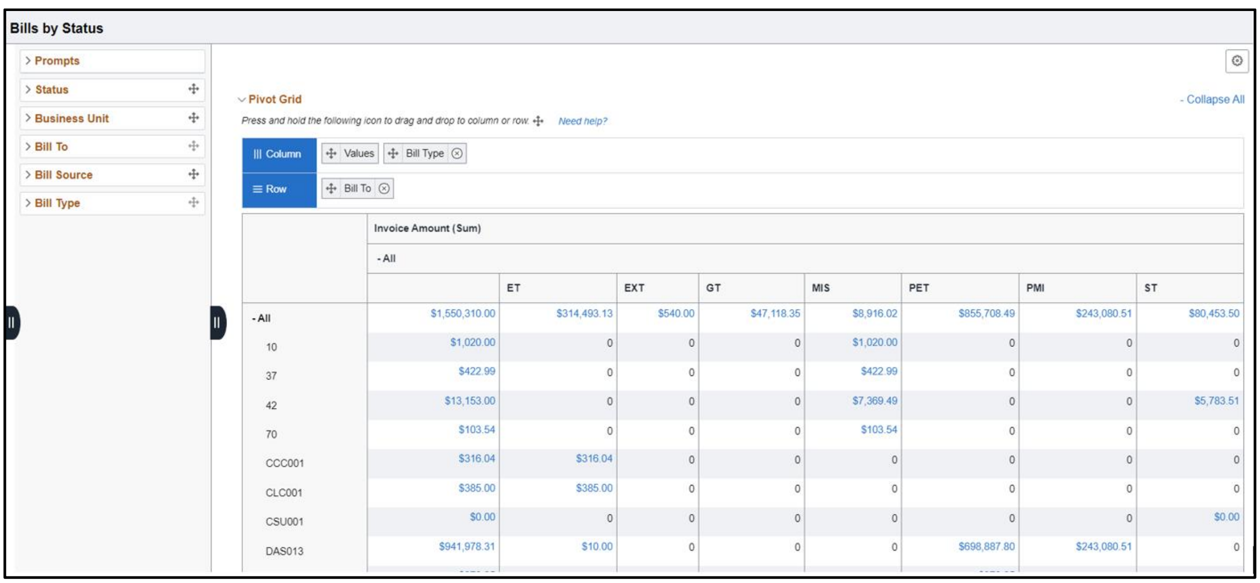
Pivot grids are data visualization tools used to summarize, analyze, and present large datasets in a structured format. They allow users to dynamically rearrange and aggregate data along different dimensions, such as rows, columns, and layers, to gain insights and identify patterns within the dataset.

This **Pivot Grid** is demonstrating the **Status** on different **Bills** between various **Bill Type**.

➢ To change the values, drag and drop data values into the **Rows** and **Columns**. Delete **Status** from rows.



a. Drag and drop **Bill To** into rows.

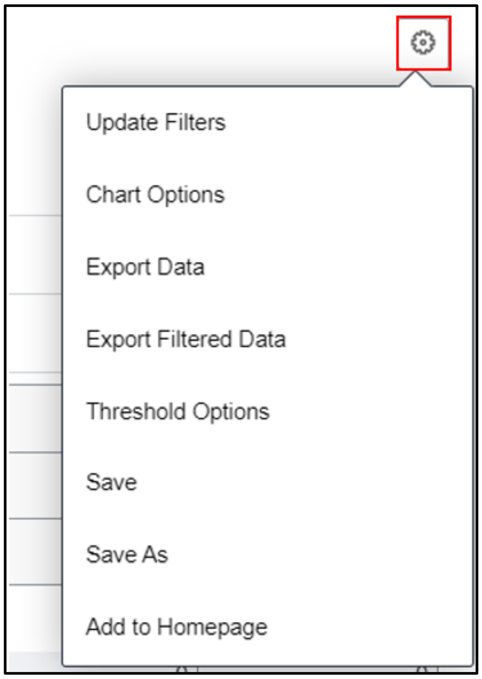


Now the pivot grid demonstrates which bills to **Bill To** depending on the **Bill Type**.

- ➢ Select the Settings to reveal additional menu options:

- **Update Filters**
- **Chart Options**
- **Export Data**
- **Export Filtered Data**

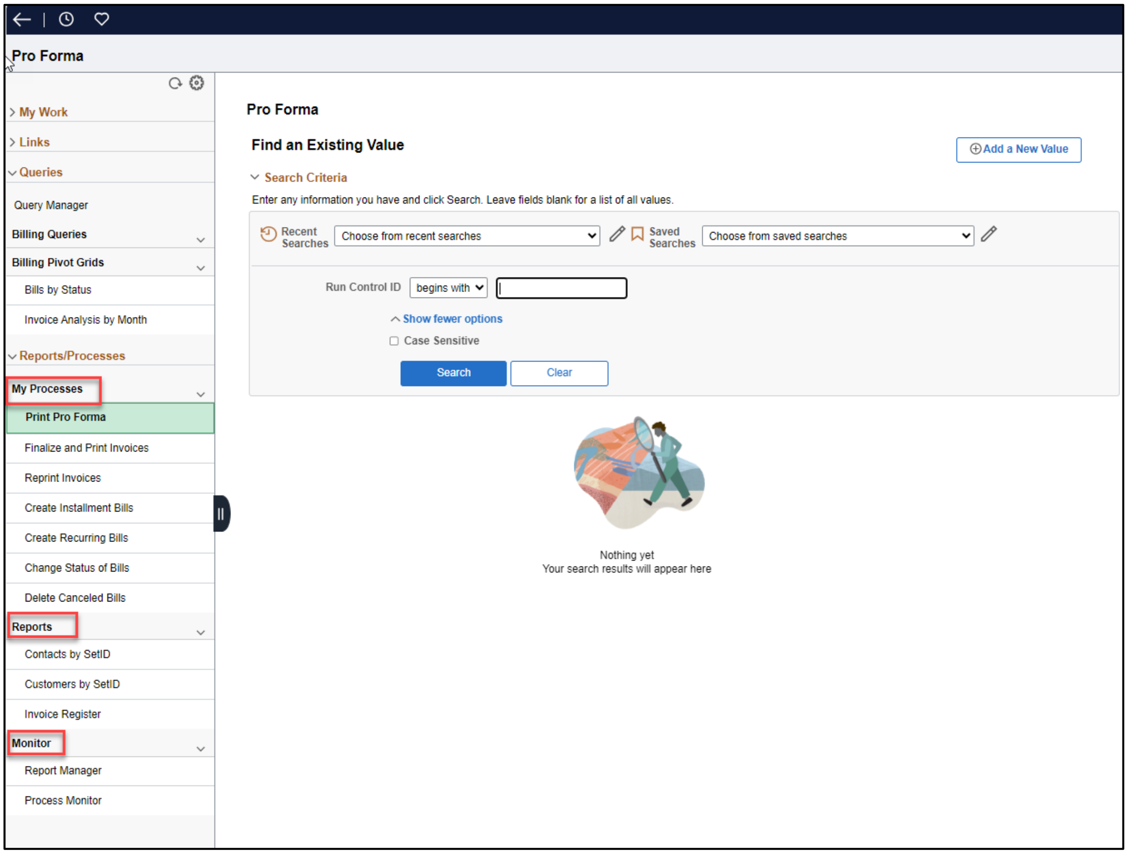
- **Threshold Options**
- **Save**
- **Save as**
- **Add to Homepage**



➢ **Reports/Processes**.

The **Reports/Processes** dropdown stores different reports and processes users may need to perform daily.

➢ **My Processes**, **Reports**, and **Monitor**.


Pro Forma
My Work
Links
Queries
Query Manager
Billing Queries
Billing Pivot Grids
Bills by Status
Invoice Analysis by Month
Reports/Processes
My Processes
Print Pro Forma
Finalize and Print Invoices
Reprint Invoices
Create Installment Bills
Create Recurring Bills
Change Status of Bills
Delete Canceled Bills
Reports
Contacts by SetID
Customers by SetID
Invoice Register
Monitor
Report Manager
Process Monitor
Pro Forma
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
Nothing yet
Your search results will appear here