Asset Management WorkCenter

In Core-CT 9.2, Asset Management features a new WorkCenter. This job aid walks users through the basic functionalities of these enhancements.

Asset Management Workcenter

Navigation:

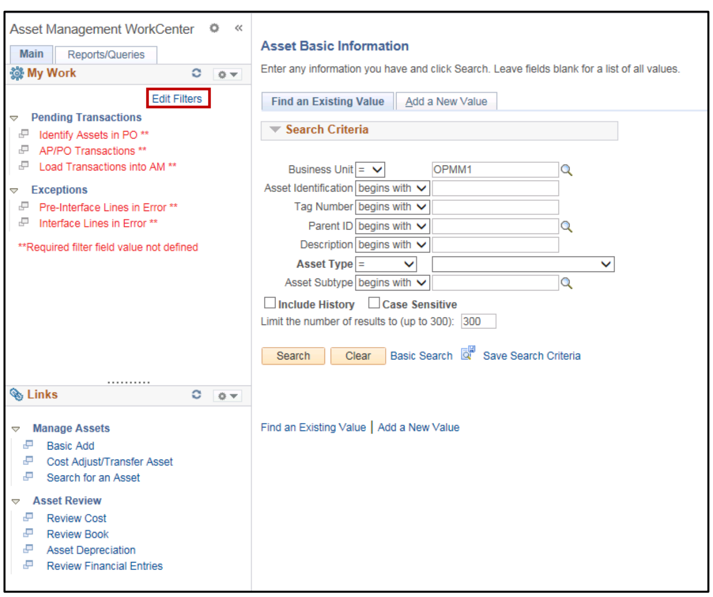
Asset Management > Asset Management WorkCenter

The Asset Management 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.

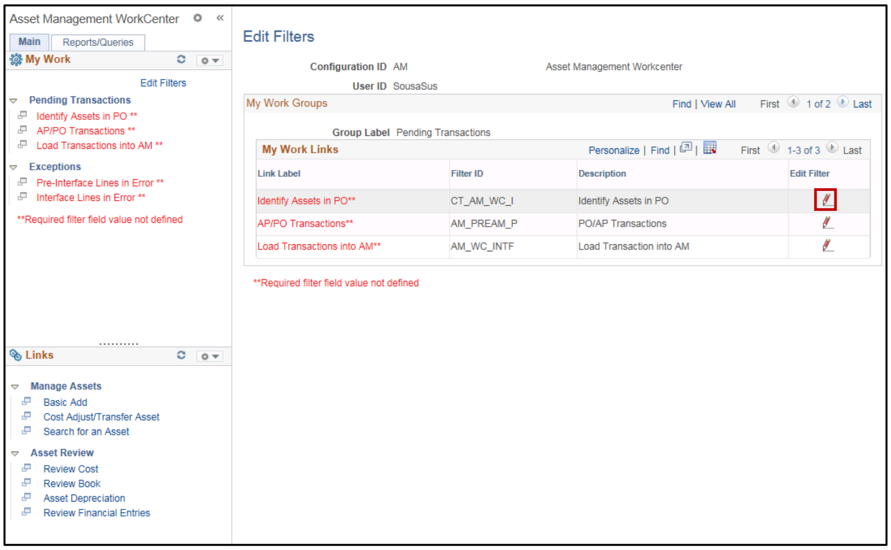
The **Main** tab contains the **My Work** and **Links** pagelets:

Note: *Users must use the **Edit Filters** feature to define the **My Work** drop down menus. To **Edit Filters**, follow these optional steps:*

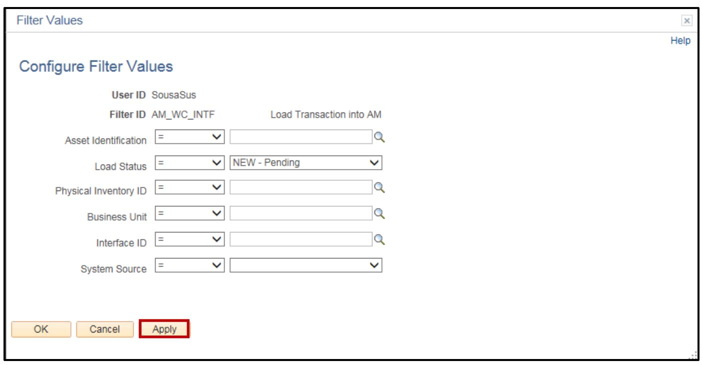
1. Click the **Edit Filters** link.
   Note: *The page displays the Pending Transactions group label links first.*



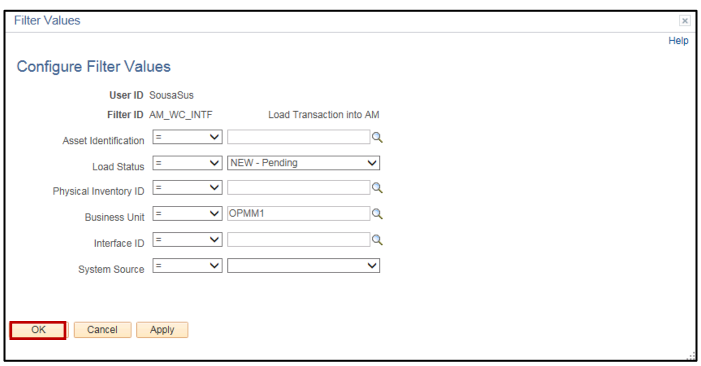
2. Click the **Pen** icon to establish links for the desired label.



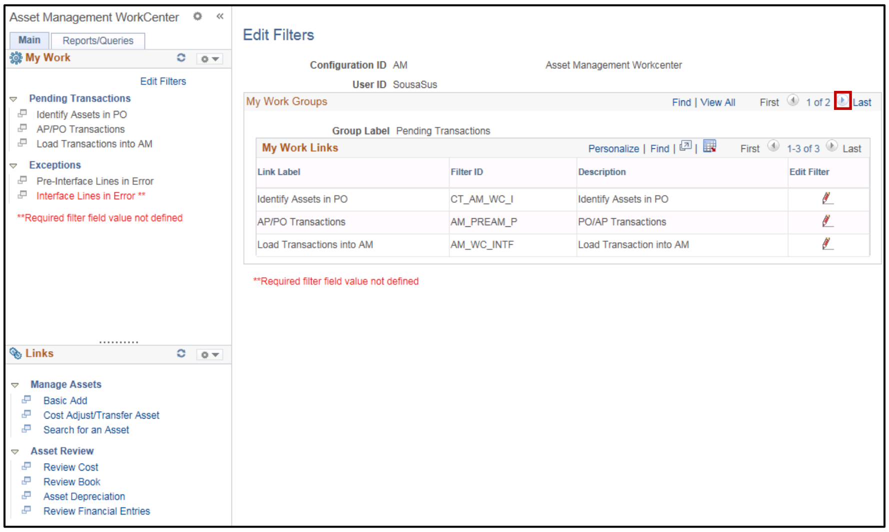
3. Enter the appropriate values into the **Configure Filter Values** fields.
4. Click the **Apply** button.



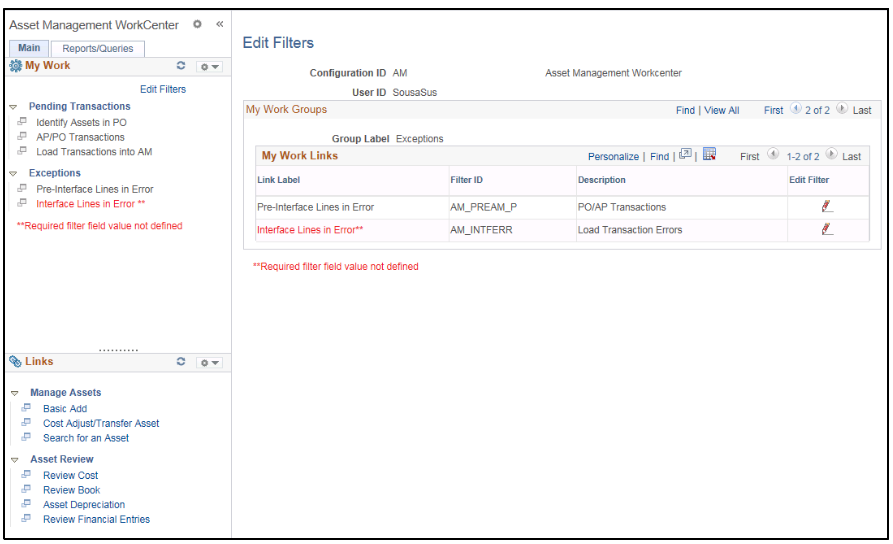
5. Click the **OK** button.



6. Repeat steps 2-5 to add edit the remaining filters.
7. Click the **Arrow** icon to navigate to the Exceptions group labels.



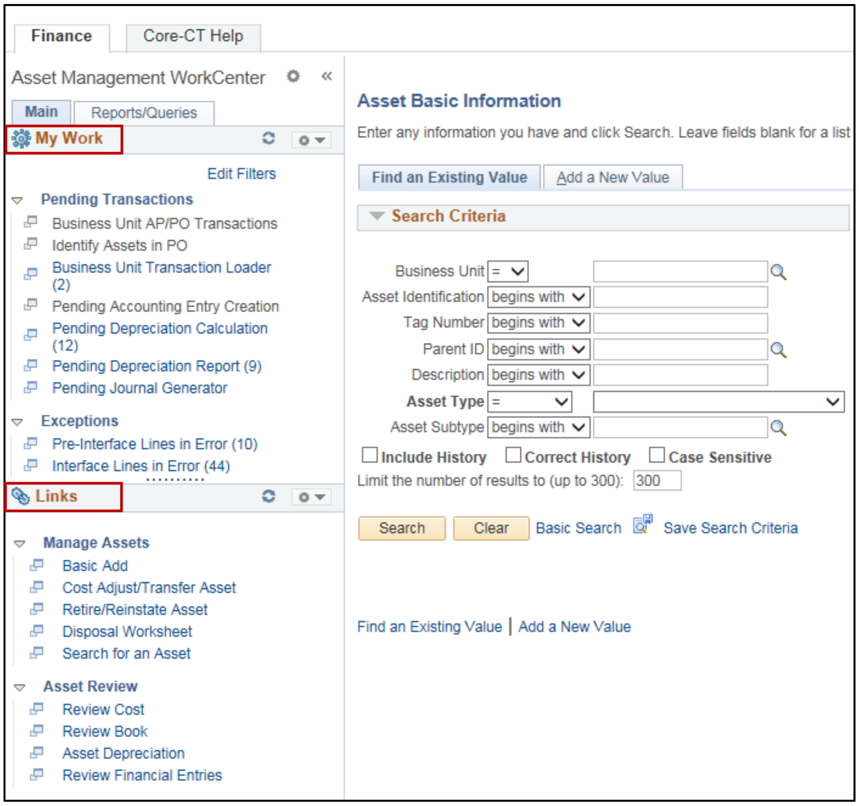
8. Repeat steps 2-5 to edit the filters for the Exceptions group labels.



Note: *When all of the filters have been established, the links in the My Work tab will no longer be red.*

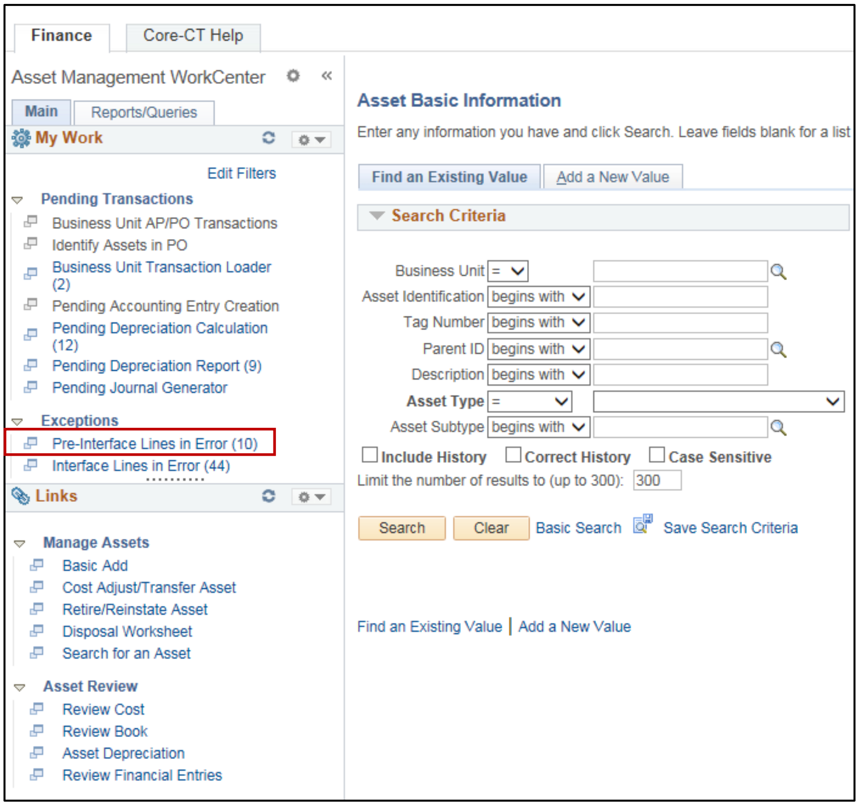
The **My Work** pagelet includes links to pages that an end user would need to access on a daily basis. Additionally, it can include exceptions and alters, where the user must take action.

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

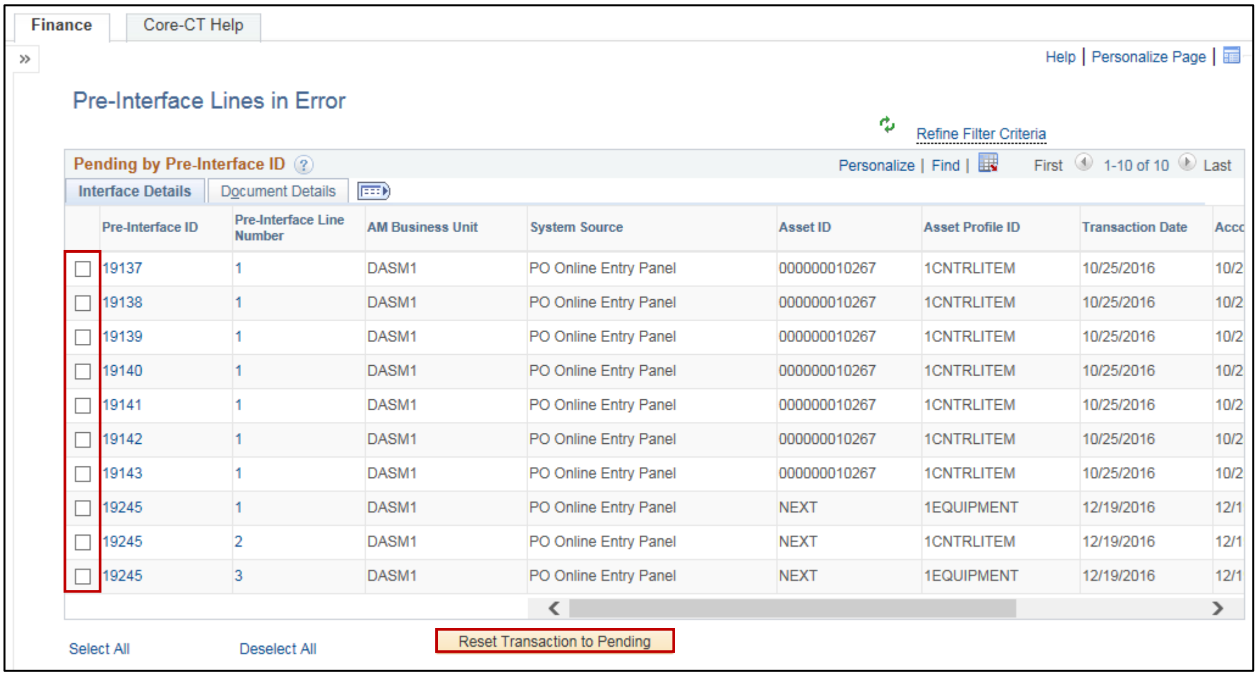


Use the Pre-Interface Lines in Error page to display pre-interface lines in error and reset transactions to pending. The number to the right of the link displays the Interface IDs are in error.

9. Click the **Pre-Interface Lines in Error** link.

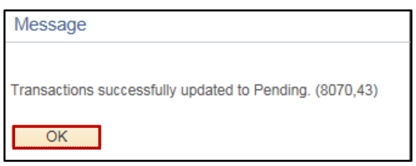


10. Select one or more **Interface IDs** and click the **Reset Transaction to Pending** button to set the selected rows in error to pending.



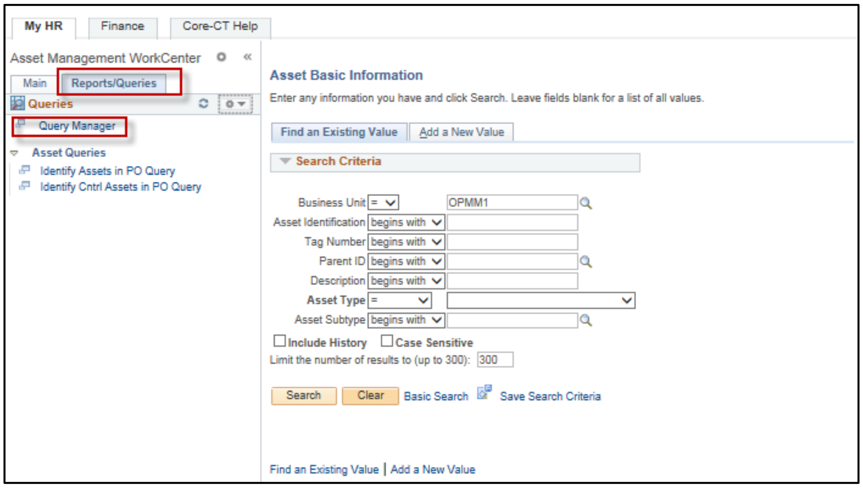
Pre-Interface ID	Pre-Interface Line Number	AM Business Unit	System Source	Asset ID	Asset Profile ID	Transaction Date	Acco
19137	1	DASM1	PO Online Entry Panel	000000010267	1CNTRLITEM	10/25/2016	10/2
19138	1	DASM1	PO Online Entry Panel	000000010267	1CNTRLITEM	10/25/2016	10/2
19139	1	DASM1	PO Online Entry Panel	000000010267	1CNTRLITEM	10/25/2016	10/2
19140	1	DASM1	PO Online Entry Panel	000000010267	1CNTRLITEM	10/25/2016	10/2
19141	1	DASM1	PO Online Entry Panel	000000010267	1CNTRLITEM	10/25/2016	10/2
19142	1	DASM1	PO Online Entry Panel	000000010267	1CNTRLITEM	10/25/2016	10/2
19143	1	DASM1	PO Online Entry Panel	000000010267	1CNTRLITEM	10/25/2016	10/2
19245	1	DASM1	PO Online Entry Panel	NEXT	1EQUIPMENT	12/19/2016	12/1
19245	2	DASM1	PO Online Entry Panel	NEXT	1CNTRLITEM	12/19/2016	12/1
19245	3	DASM1	PO Online Entry Panel	NEXT	1EQUIPMENT	12/19/2016	12/1

11. The confirmation message displays.
12. Click the **OK** button.

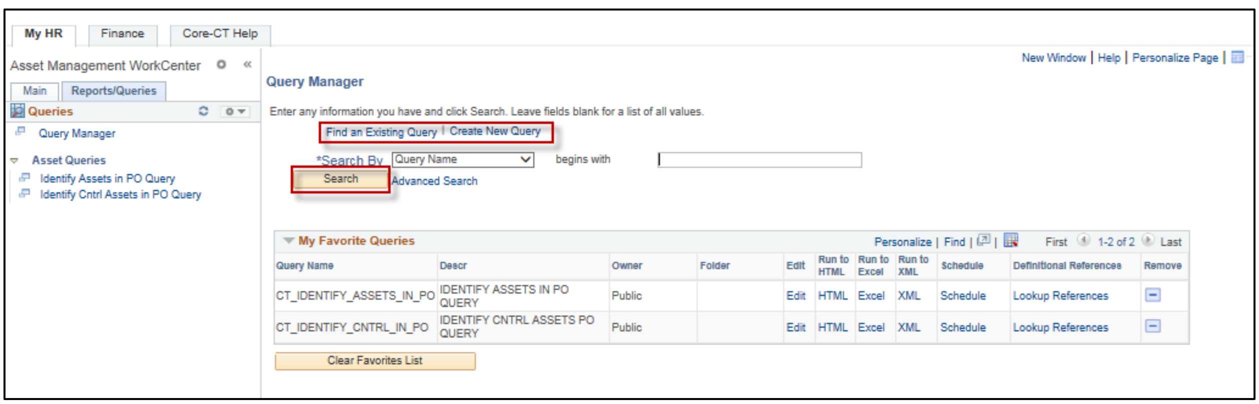


The **Reports / Queries** tab contains **Queries** and **Reports and Processes**. The **Queries** section includes links to Query Manager and public and private queries.

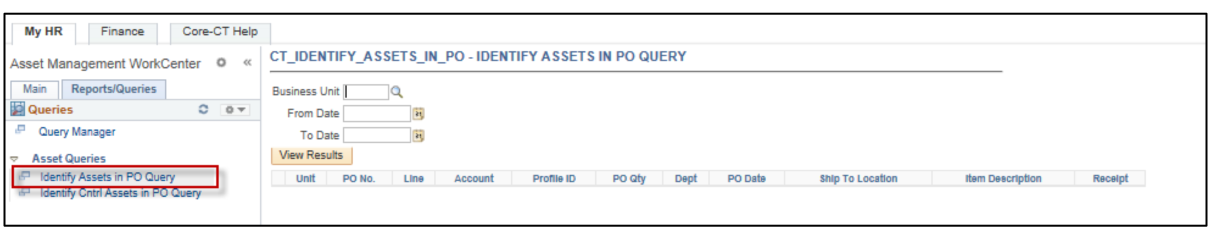
13. Click the **Reports / Queries** tab.
14. Click the **Query Manager** link.



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



17. Use an existing query, expand the **Asset Queries** drop down.
18. Click **Identify Assets in PO Query.**



19. Click **Identify Cntrl Assets in PO Query.**

The **Reports and Processes** section includes links that take you to the run control page for reports, processes, and the Reporting Console.

20. Expand the **Asset Reports** and **Process Monitor** dropdowns.