Billing WorkCenter

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

Billing WorkCenter

Navigation:

Billing > Billing WorkCenter

The Billing 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 the Billing application and related accounting functions. Users will be able to perform daily tasks without leaving the WorkCenter, which reduces time when navigating through menu items.

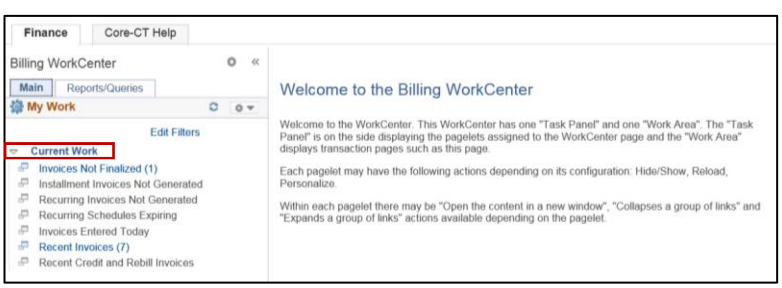
The Billing WorkCenter can include these tabs and sections:

- Daily Billing Functions
- Exception Alerts
- Monthly Activities
- Reporting

When accessing the WorkCenter, the **Main** tab is selected. The **Main** tab contains the **My Work** and **Links** pagelets:

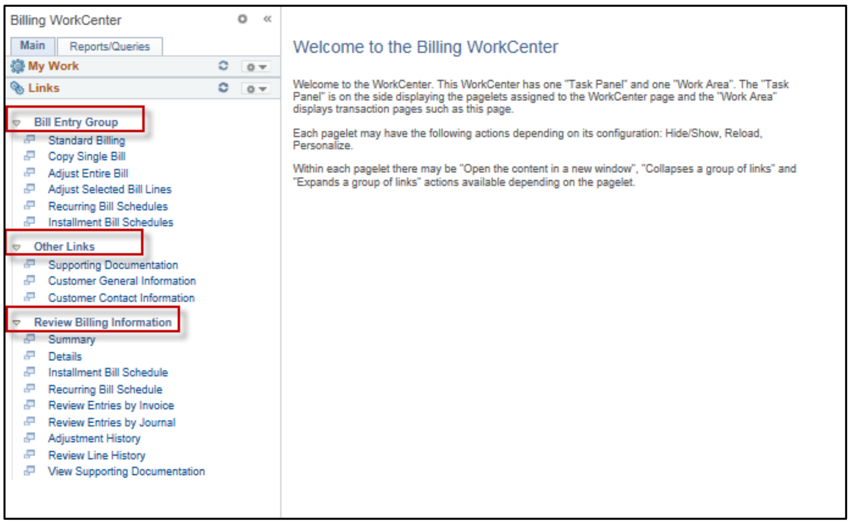
The **My Work** pagelet includes links to pages that an end user would need to access on a daily basis. Additionally, it can include exceptions and alters, where the user must take action. Links are grouped into four areas – Alerts, Items, Payments, Interfaces Not Run, and Exceptions.

1. Click the **Current Work** drop down



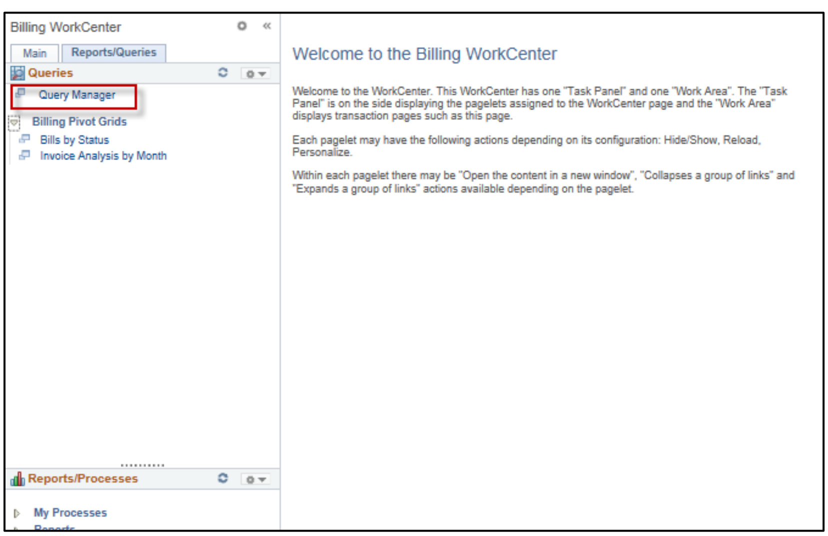
The **Links** pagelet includes additional links to pages, or other areas of interest, for the user.

2. Expand the **Bill Entry Group, Other Links,** and **Review Billing Information** drop downs.



The **Reports / Queries** tab contains **Queries** and **Reports and Processes**. 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 displays in the right pane of the WorkCenter, or in a new window. Users may save these queries to excel.

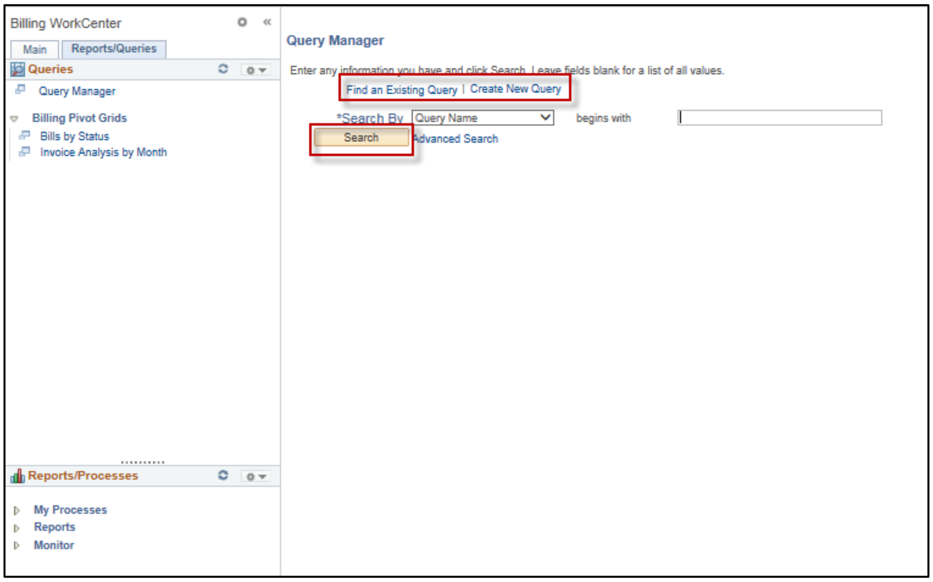
3. Click the **Reports / Queries** tab.
4. Click the **Query Manager** link.



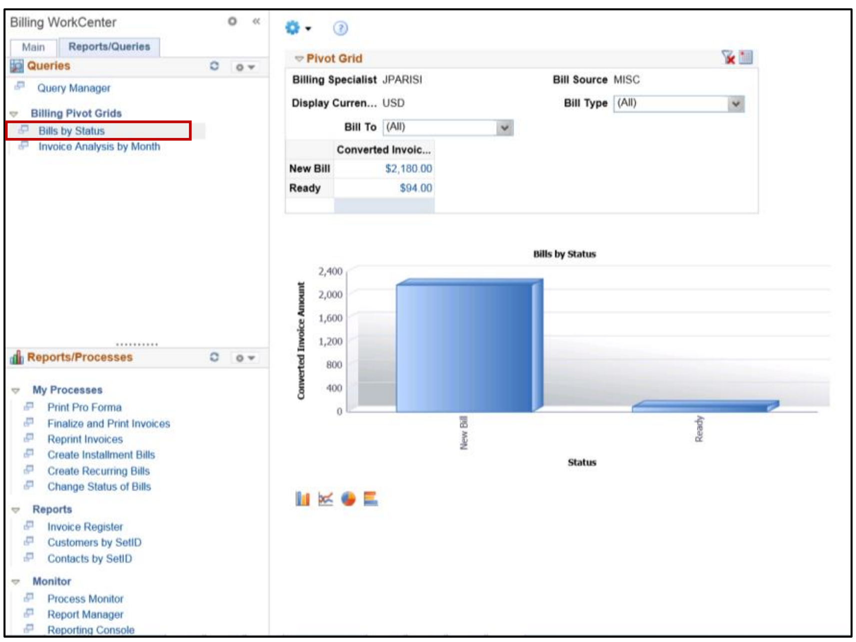
5. Using the **Search** function, users can pull up existing queries

6. Users may also click the **Create New Query** instead of **Find an Existing Query**

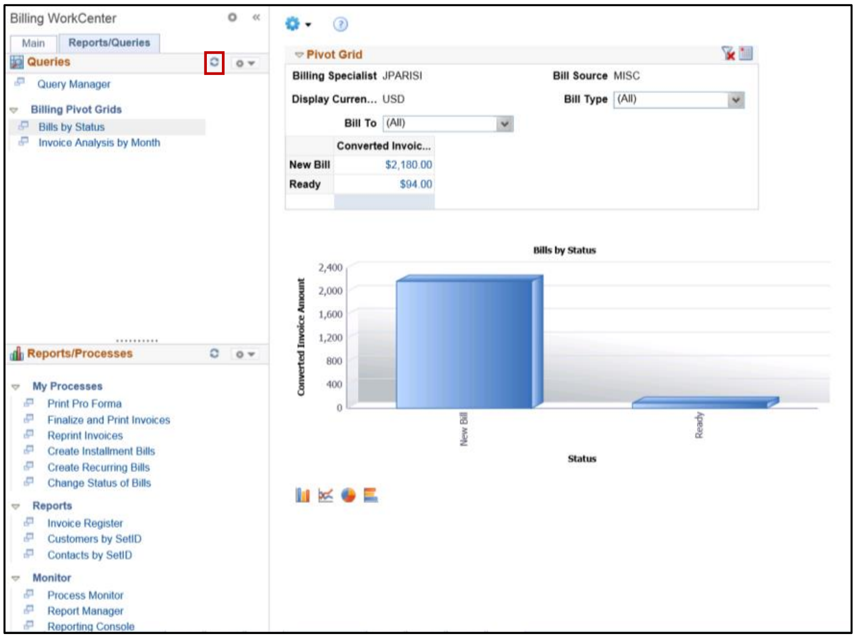
   Note: Security access prevents users from accessing queries outside of their role.



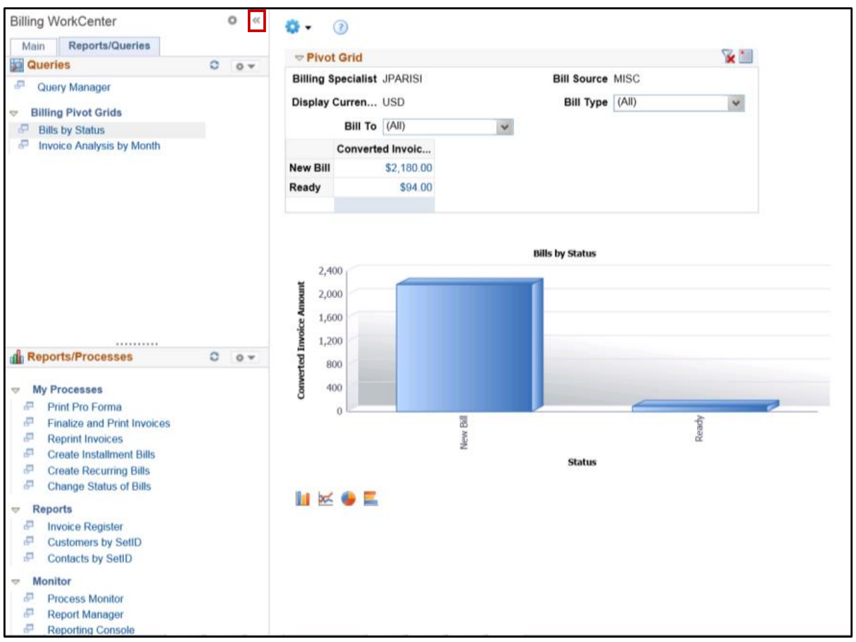
7. Click the **Billing Pivot Grids** drop down
8. Click **Bill by Status**



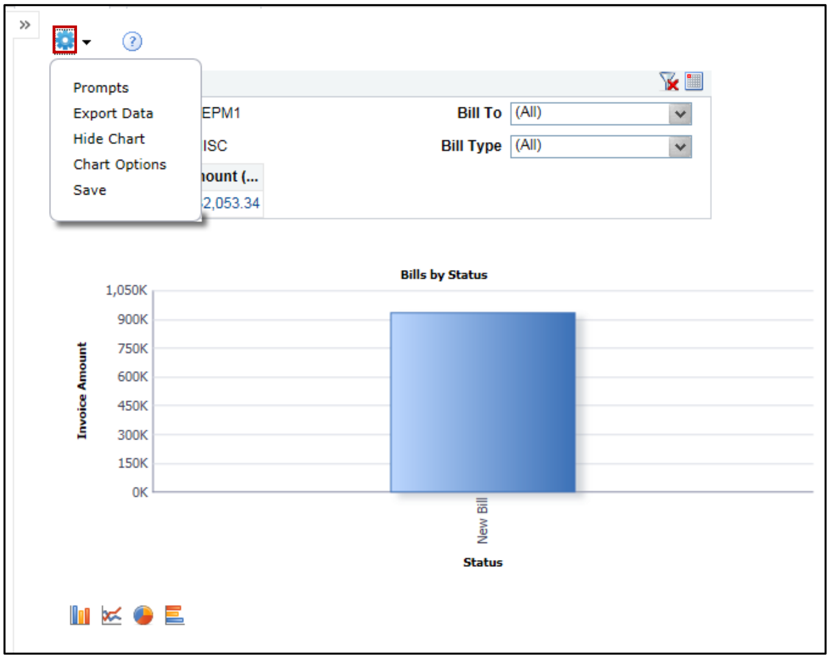
9. To refresh the page, click the **Refresh** button located in the upper right corner of **Bill by Status.**



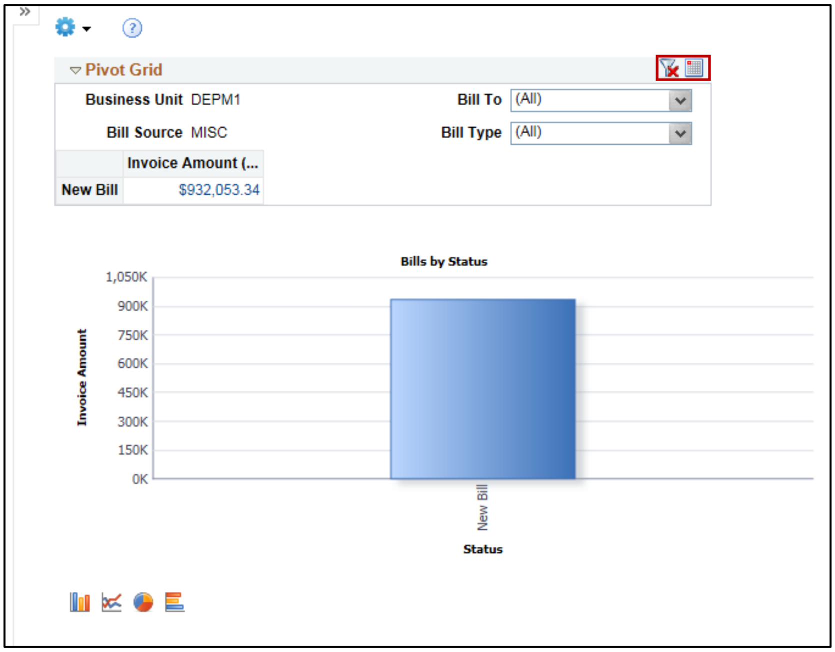
10. To minimize the **Bill by Status** pagelet, click the **Minimize** button located in the upper right corner of the pagelet (to the right of the **Refresh** button).



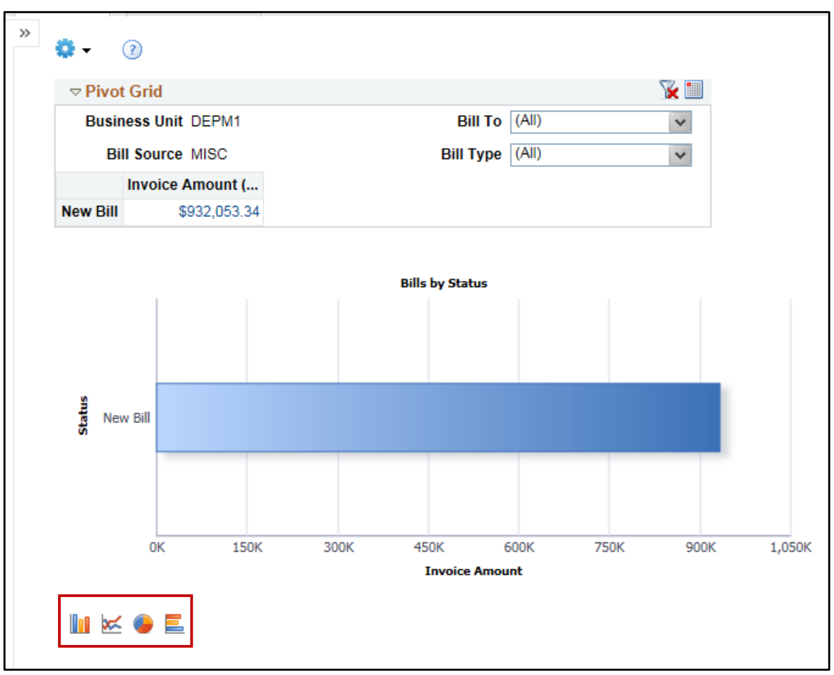
11. Select the **Cog** to reveal additional menu options:
    a. **Prompts**
    b. **Export Data**
    c. **Hide Chart**
    d. **Chart Options**
    e. **Save**



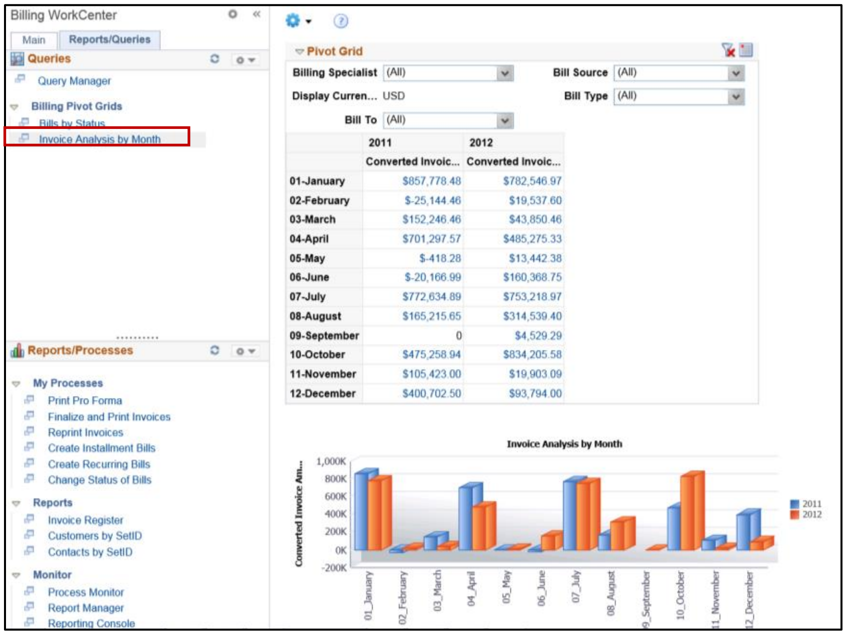
12. In the upper right hand corner of the **Pivot Grid** tab, click the **Hide Filter** icon (funnel with a red "X") to collapse the filters. In the upper right hand corner of the **Pivot Grid** tab, click the **Download** icon (located to the right of the **Hide Filters** icon) to **Download** the chart.



13. Click the **Bar Chart, Line Chart, Pie Chart,** or **Horizontal Bar Chart** icons in the bottom left corner of the **Bill by Status** pagelet to change the graphical representation of the data.



14. Click **Invoice Analysis by Month.**



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

15. Expand the **My Processes, Reports,** and **Monitor** drop downs.