WorkCenter Personalization

The 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. This job aid walks through the steps to personalize the WokCenter.

Workcenter

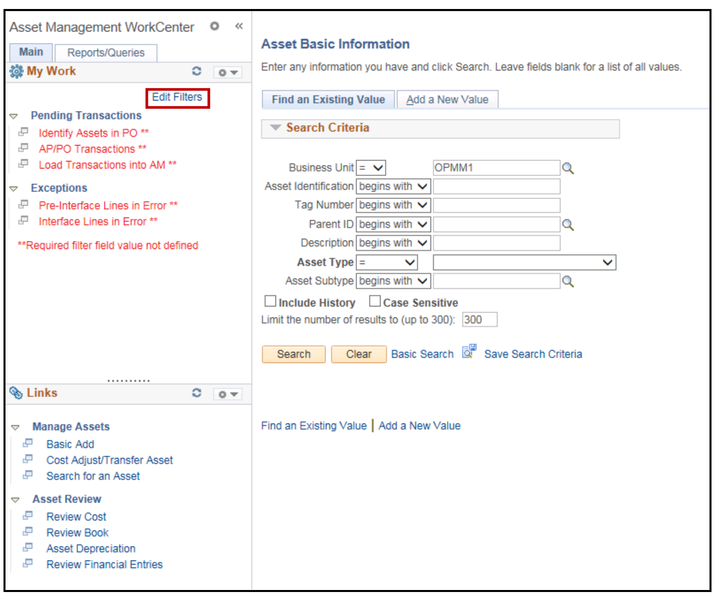
Navigation:

Core-CT Financials > (Module) > (Module) WorkCenter

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

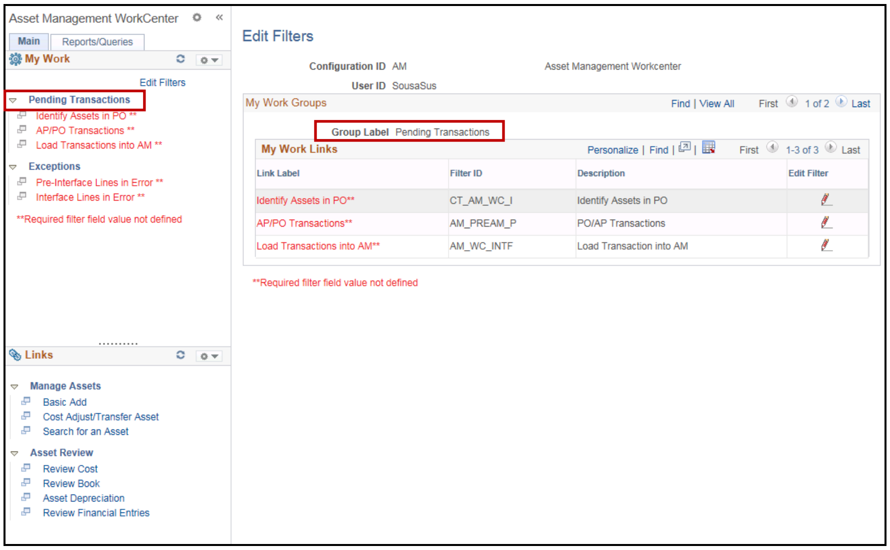
Note: *Users must use the **Edit Filters** feature to define the **My Work** drop down menus. To **Edit Filters**, follow these optional steps:*

1. Click the **Edit Filters** link.

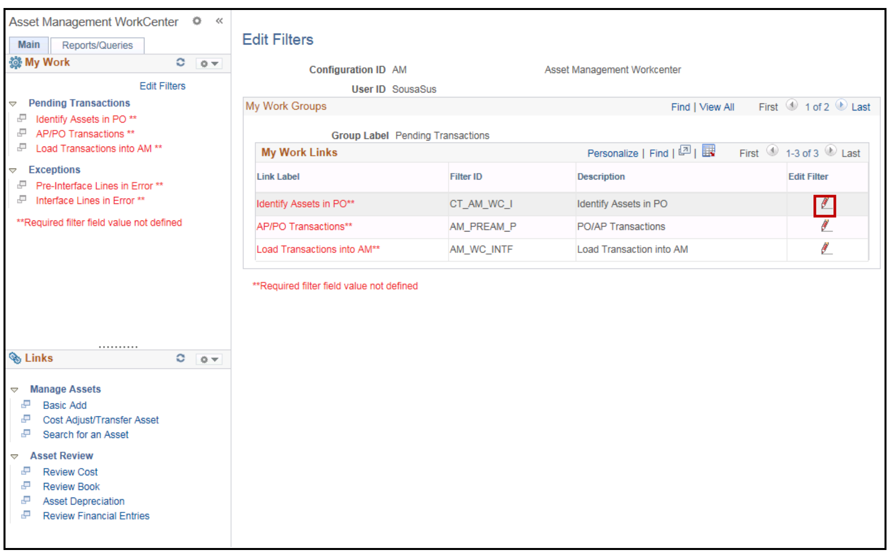


2. The **Edit Filters** page displays.

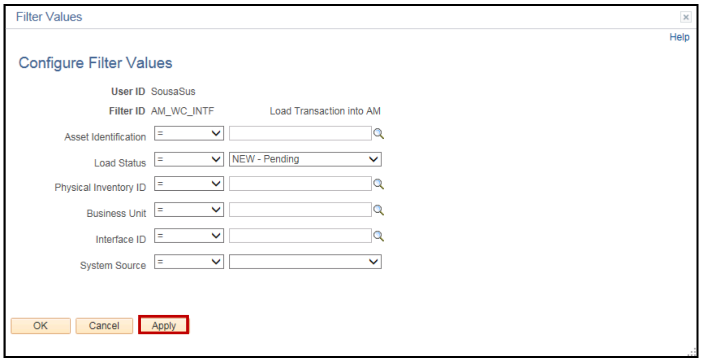
   Note: *The first **Group Label** will display on the **Edit Filters** page. In this example, the Pending Transaction Group Label appears first in the **My Work** tab, therefore the Pending Transactions Group Label is the first set of links displayed to edit.*



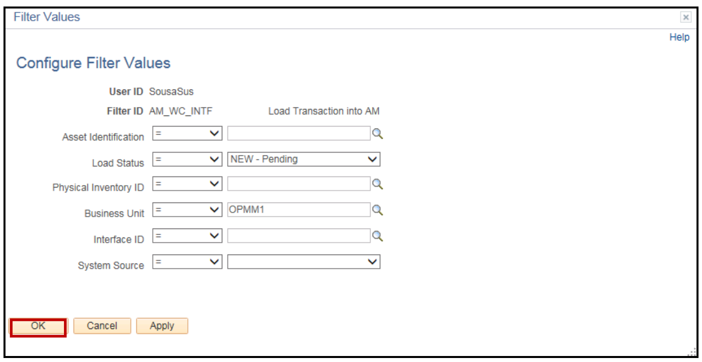
3. Click the **Pen** icon to establish links for the desired label.



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



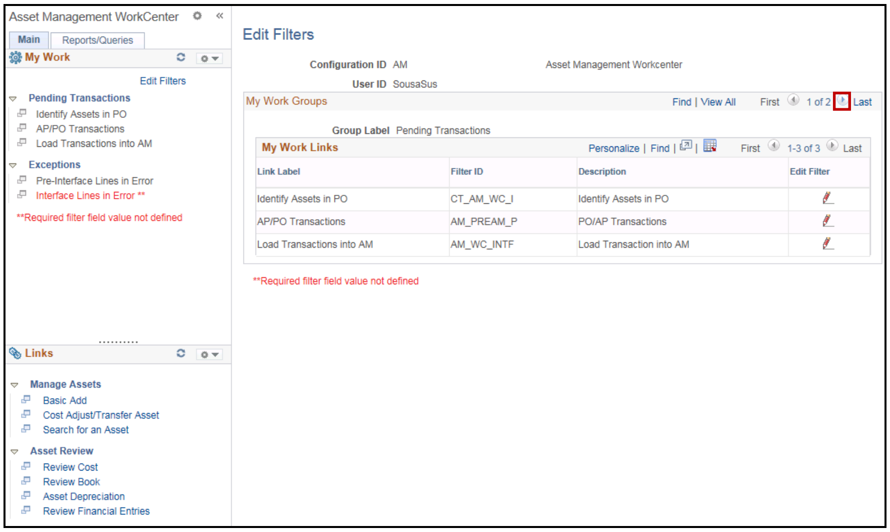
6. Click the **OK** button.



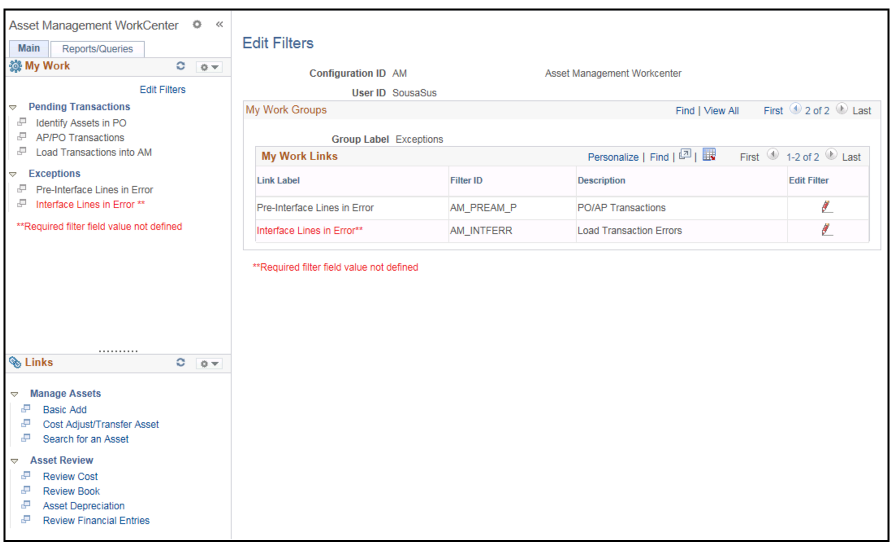
7. Repeat steps 2-6 to add edit the remaining filters.

8. Click the **Arrow** icon to navigate to the next set of group labels.

   Note: *In this example, the Exceptions Group Label is the second set of Group Labels in the **My Work** tab, therefore the Exceptions Group Label is the second set of links displayed to edit.*



9. Repeat steps 2-6 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.*