



## 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 WorkCenter.

### Workcenter

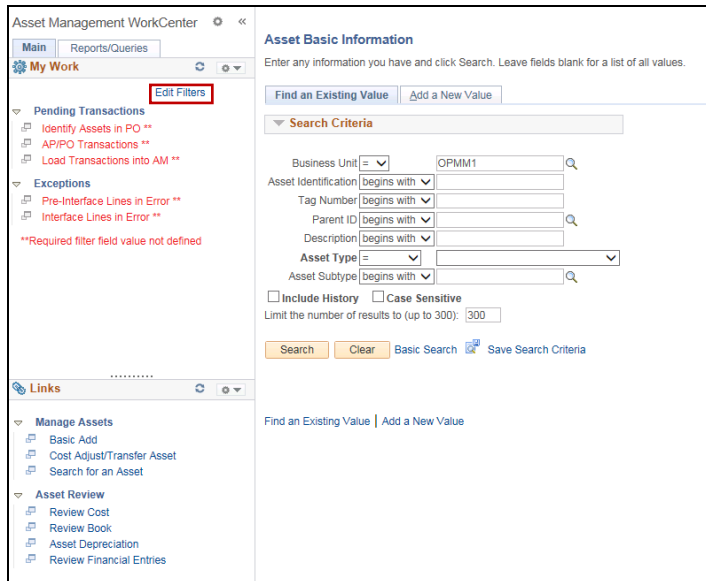
Navigation:

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

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

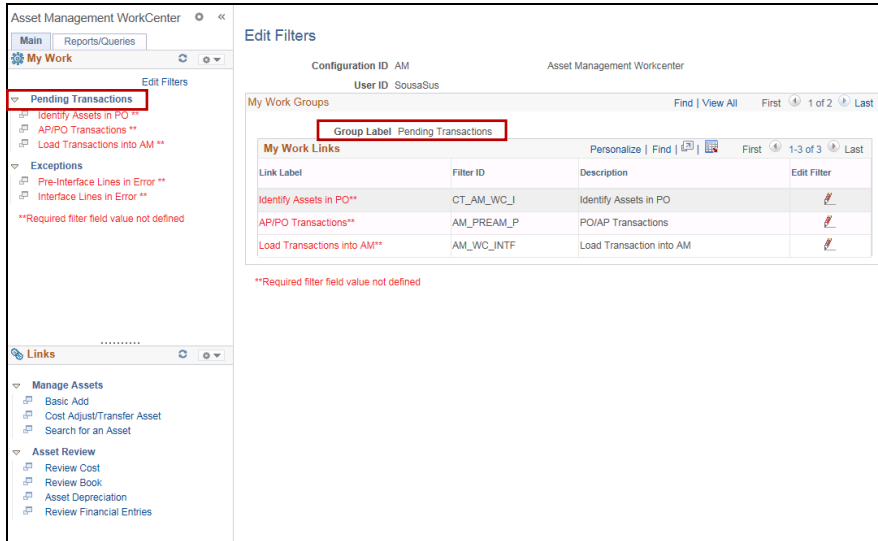
Note: Users must use the **Edit Filters** feature to define the **My Work** drop down menus. To **Edit Filters**, follow these optional steps:

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

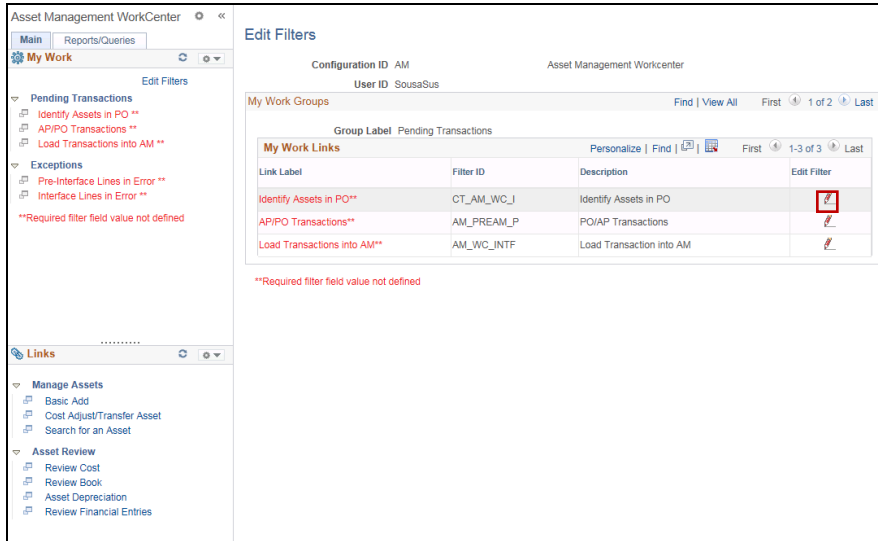


2. The **Edit Filters** page displays.

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.

The screenshot shows a window titled "Filter Values" with a "Help" button in the top right corner. Below the title bar is the "Configure Filter Values" section. It displays the following information: "User ID: SousaSus", "Filter ID: AM\_WC\_INTF", and "Load Transaction into AM". There are seven rows of input fields, each with a dropdown menu on the left and a search icon on the right. The fields are: "Asset Identification", "Load Status" (with "NEW - Pending" selected), "Physical Inventory ID", "Business Unit", "Interface ID", and "System Source". At the bottom of the window, there are three buttons: "OK", "Cancel", and "Apply". The "Apply" button is highlighted with a red rectangular box.

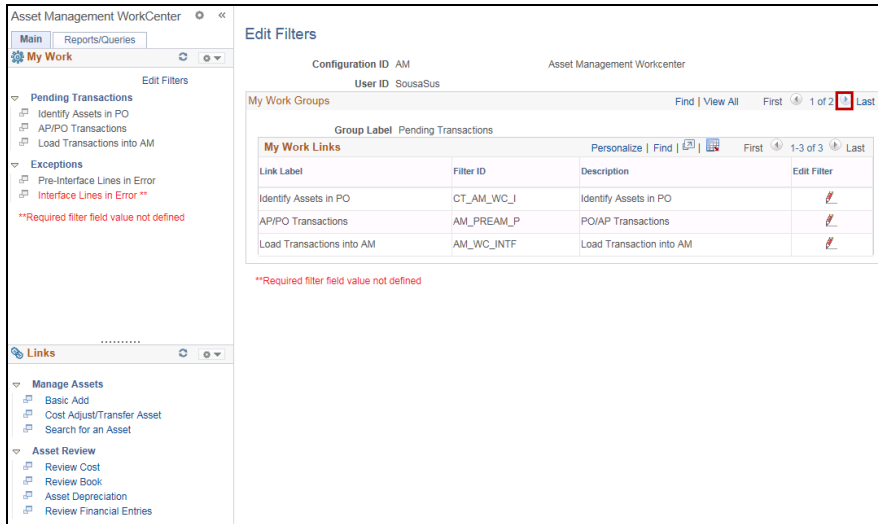
6. Click the **OK** button.

This screenshot is identical to the previous one, showing the "Filter Values" dialog box. In this instance, the "OK" button at the bottom left is highlighted with a red rectangular box, indicating it has been clicked.

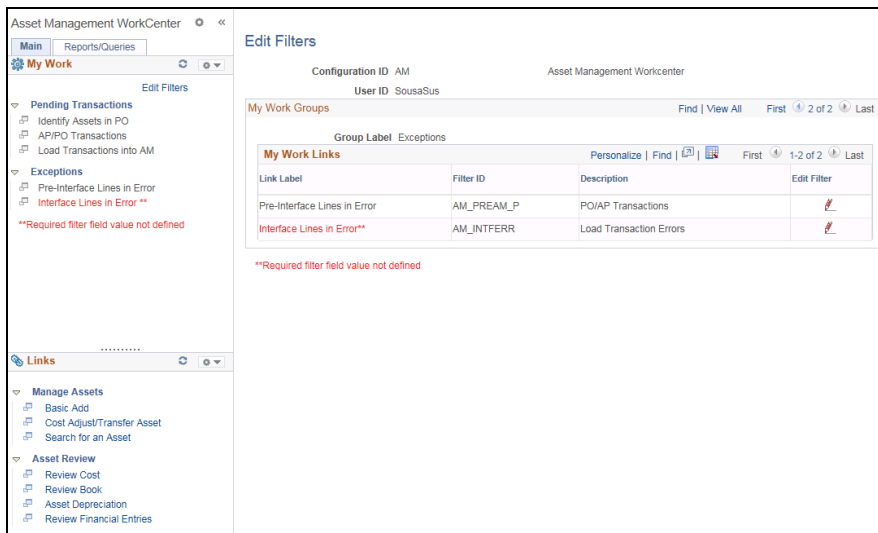
7. Repeat steps 2-6 to add edit the remaining filters.

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.

The screenshot displays the 'Asset Management WorkCenter' interface. At the top, there are tabs for 'Finance' and 'Core-CT Help'. Below this, the 'Asset Management WorkCenter' title is shown with a gear icon and a double arrow. The main navigation area includes 'Main' and 'Reports/Queries' tabs, with 'My Work' selected and highlighted in red. Under 'My Work', there are sections for 'Edit Filters', 'Pending Transactions' (with sub-items like 'Business Unit AP/PO Transactions', 'Identify Assets in PO', etc.), 'Exceptions' (with sub-items like 'Pre-Interface Lines in Error (10)', 'Interface Lines in Error (44)'), and 'Links'. The 'Links' section is expanded to show 'Manage Assets' (with sub-items like 'Basic Add', 'Cost Adjust/Transfer Asset', etc.) and 'Asset Review' (with sub-items like 'Review Cost', 'Review Book', etc.).

The right-hand pane is titled 'Asset Basic Information' and contains a search form. It starts with the instruction 'Enter any information you have and click Search. Leave fields blank for a list'. Below this are two buttons: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' section follows, with fields for 'Business Unit', 'Asset Identification' (beginning with), 'Tag Number' (beginning with), 'Parent ID' (beginning with), 'Description' (beginning with), 'Asset Type', and 'Asset Subtype' (beginning with). There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', and a text input for 'Limit the number of results to (up to 300): 300'. At the bottom of the search form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search form, there are two buttons: 'Find an Existing Value' and 'Add a New Value'.