WorkCenters in PeopleSoft

WorkCenters in PeopleSoft offers users a one stop shop approach to getting access to their work and reducing the amount of navigation required. There are currently WorkCenters for Accounts Payable, General Ledger, Billing, Receivables, Asset Management, Buyer and Supply/Demand. WorkCenters can be accessed from the Financial Home page.

Some basic set-up is required before the My Work section of the WorkCenters can be fully functional. When accessing the WorkCenter for the first time, the links in the My Work section will appear red. The red color indicates that the filters have not been set.

To set the filters, click on the Edit Filters link in the My Work section.
The Edit Filters screen will open. Click on the edit filter link.

Again, a new screen will open. At a minimum a Business Unit must be entered. For Voucher Mass Approval, an Approval Status must also be entered. This filter screen can be used to filter multiple criteria.

Once the filter values have been set, click OK. A reminder to refresh the page should appear. Click OK. Repeat this process for each filter that needs to be set-up.
The pagelet must be refreshed each time a filter is changed. To refresh the pagelet, click on the circle of arrows on the My Work header bar.

The pagelet will refresh automatically each time a user enters a WorkCenter. The basic filter configuration only has to be done once.

Once the filters have been set-up, the links in the My Work section should change color. A blue link alerts the user that there is work waiting to be completed. Clicking on the blue link will take the user to their work without further navigation.

If a link appears in black, there is no work waiting.

Users can widen the WorkCenter screen if needed by clicking on the double arrows at the top of the pagelet. Clicking on the double arrows again will return the screen to normal.
In addition to the My Work section, the WorkCenter contains links to various functions.

As well as links to reports and queries.

For further questions on configuration and use of WorkCenters, contact OMB.