

## WorkCenters in v9.2

In the 9.2 upgrade, WorkCenters were provided for Accounts Payable and General Ledger. As of Release 5.00, GeorgiaFIRST users will also have access to WorkCenters in the Purchasing and Asset Management modules.

PeopleSoft WorkCenters are designed to allow users to access their most commonly used reports, queries, pages and processes in a single location. Each WorkCenter has an area for work and links to frequently accessed pages, reports, and queries.

**Navigation: Accounts Payable > Accounts Payable WorkCenter**

**Navigation: General Ledger > GL WorkCenter**

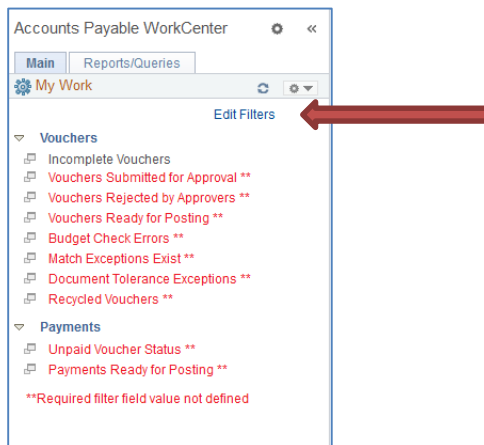
**Navigation: Purchasing > Buyer WorkCenter**

**Navigation: Asset Management > Asset Management WorkCenter**

### Define Your Business Unit

In order to use the Accounts Payable, General Ledger, Purchasing (Buyer), and Asset Management WorkCenters, you will need to define your business unit for each work link. Completed edits are in black lettering, and work links that need to have their business unit defined are in red lettering.

#### 1. Click **Edit Filters**



2. My Work Links menu will appear. Click the **Edit Filter** for the Work Link you would like to edit.

**Edit Filters**

Configuration ID AP Accounts Payable WorkCenter  
 User ID OIITSAXON

My Work Groups Find | View All First 1 of 2 Last

Group Label Vouchers

My Work Links Personalize | Find | First 1-8 of 8 Last

Link Label	Filter ID	Description	Edit Filter
Incomplete Vouchers	AP_INCVCHR	Incomplete Voucher	
Vouchers Submitted for Approval**	AP_VCHRPND	Vouchers Pending Approval	
Vouchers Rejected by Approvers**	AP_VCHRDNY	Vouchers Rejected by Approvers	
Vouchers Ready for Posting**	AP_VCHRPST	Vouchers Ready for Posting	
Budget Check Errors**	AP_BDGT_ER	Budget Check Errors	
Match Exceptions Exist**	AP_WB_E	Match Exceptions Exist	
Document Tolerance Exceptions**	AP_DOC_TOL	Document Tolerance Exceptions	
Recycled Vouchers**	AP_VRCYCL	Recycled Vouchers	

\*\*Required filter field value not defined

3. Add **Business Unit**, which is a required field value in the Configure Filter Values box that pops up. Click OK.

**Edit Filters**

Configuration ID AP Accounts Payable WorkCenter  
 User ID OIITSAXON

My Work Groups

Group Label Vouchers

My Work Links

Link Label Filter ID Description Edit Filter

Incomplete Vouchers AP\_INCVCHR Incomplete Voucher

Vouchers Submitted for Approval\*\* AP\_VCHRPND Vouchers Pending Approval

Vouchers Rejected by Approvers\*\* AP\_VCHRDNY Vouchers Rejected by Approvers

Vouchers Ready for Posting\*\* AP\_VCHRPST Vouchers Ready for Posting

Budget Check Errors\*\* AP\_BDGT\_ER Budget Check Errors

Match Exceptions Exist\*\* AP\_WB\_E Match Exceptions Exist

Document Tolerance Exceptions\*\* AP\_DOC\_TOL Document Tolerance Exceptions

Recycled Vouchers\*\* AP\_VRCYCL Recycled Vouchers

\*\*Required filter field value not defined

**Filter Values**

**Configure Filter Values**

User ID OIITSAXON

Filter ID AP\_VCHRPND Vouchers Pending Approval

Business Unit

Voucher ID

Supplier ID

4. A message will state that you need to refresh the pagelet to see changes. **Click OK.**

**Edit Filters**

Configuration ID AP Accounts Payable WorkCenter  
 User ID OIITSAXON

My Work Groups Find | View 1 First 1-2 of 2 Last

Group Label Vouchers

My Work Links Personalize | Find | First 1-8 of 8 Last

Link Label	Filter ID	Description	Edit Filter
Incomplete Vouchers	AP_INCVCHR	Incomplete Voucher	
Vouchers Submitted for Approval	AP_VCHRPND	Vouchers Pending Approval	
Vouchers Rejected by Approvers**	AP_VCHRDNV	Vouchers Rejected by Approvers	
Vouchers Ready for Posting**	AP_VCHRFR	Vouchers Ready for Posting	
Budget Check Errors**	AP_BDGT	Budget Check Errors	
Match Exceptions Exist**	AP_WB_E	Match Exceptions Exist	
Document Tolerance Exceptions**	AP_DOC_T	Document Tolerance Exceptions	
Recycled Vouchers**	AP_VRCYCL	Recycled Vouchers	



**Message**

Refresh the pagelet to see your changes. (7980,22)

5. Click the **refresh** button in the WorkCenter menu to view changes that were made.

**Accounts Payable WorkCenter**

Main Reports/Queries

My Work  

Edit Filters

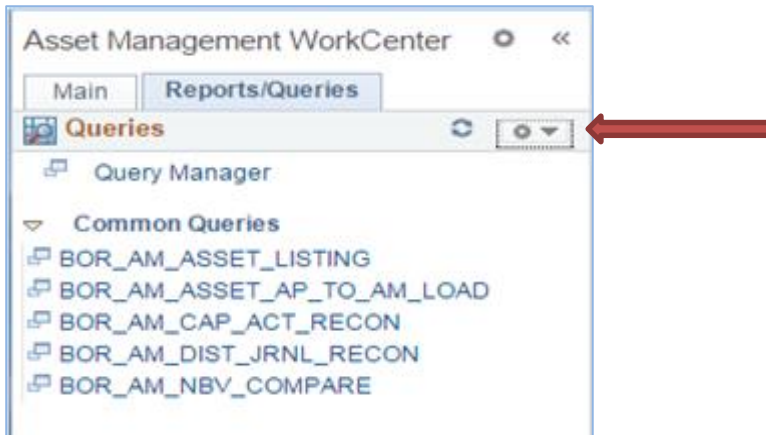
- Vouchers**
  - Incomplete Vouchers
  - Vouchers Submitted for Approval
  - Vouchers Rejected by Approvers \*\*
  - Vouchers Ready for Posting \*\*
  - Budget Check Errors \*\*
  - Match Exceptions Exist \*\*
  - Document Tolerance Exceptions \*\*
  - Recycled Vouchers \*\*
- Payments**
  - Unpaid Voucher Status \*\*
  - Payments Ready for Posting \*\*

\*\*Required filter field value not defined

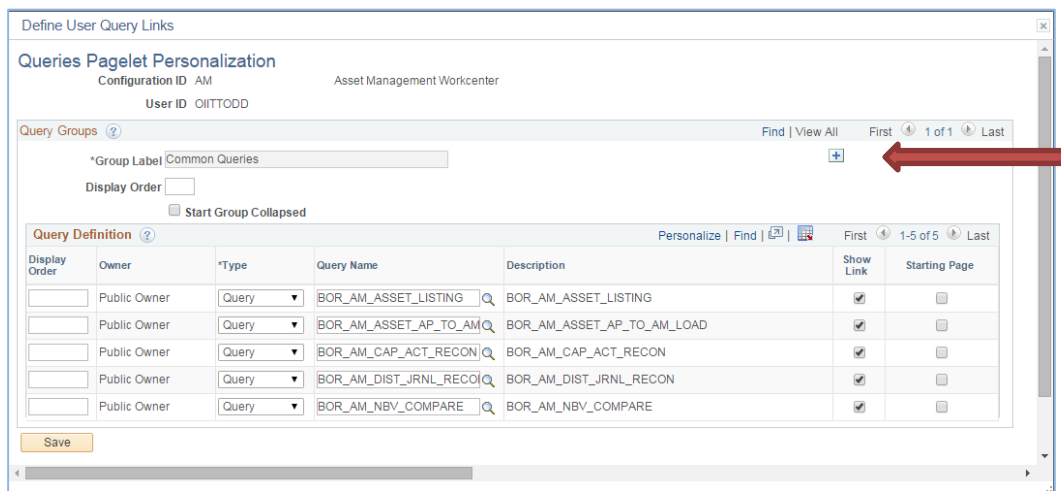
## Adding Queries to WorkCenters

You also have the option to add your own commonly used queries to the Reports/Queries section of the WorkCenters.

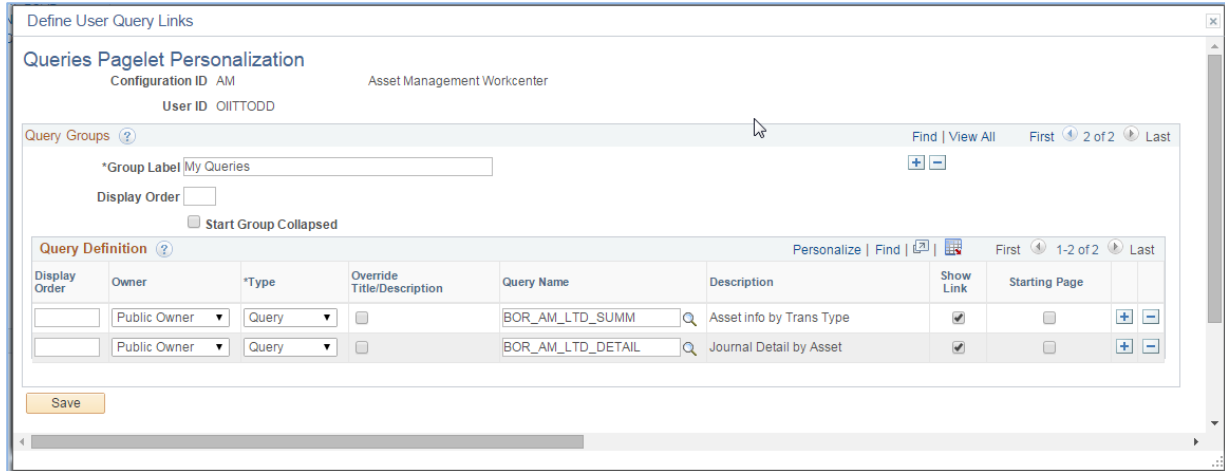
1. Queries can be added by going to the Queries Pagelet Settings on the Reports/Queries tab of the WorkCenter and choosing the Personalize link.



2. Add a new Query Group. Enter a Group Label (description) like “My Queries”.

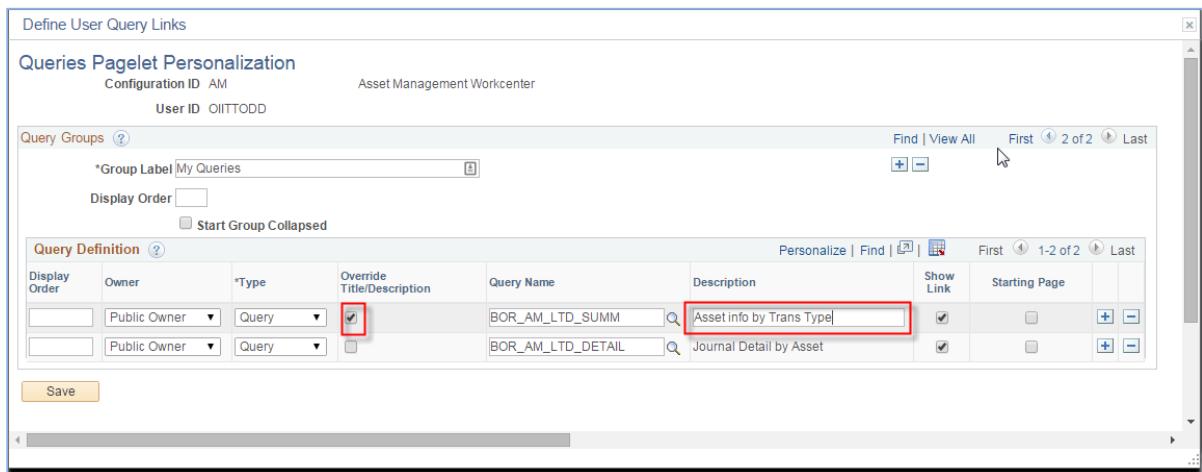


3. Add Queries as desired and click Save.

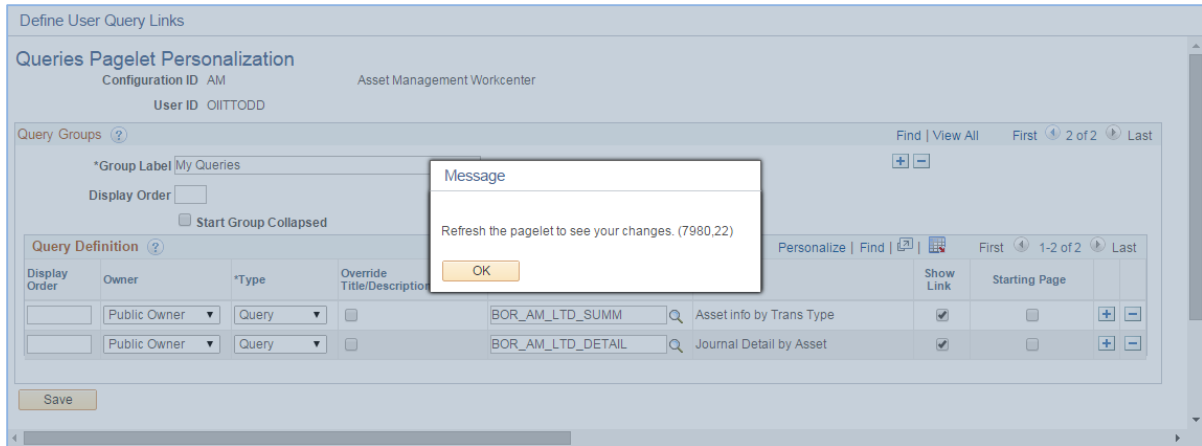


Added queries will appear in the WorkCenter with the query description displayed. If you would like to change the query description to a more descriptive title:

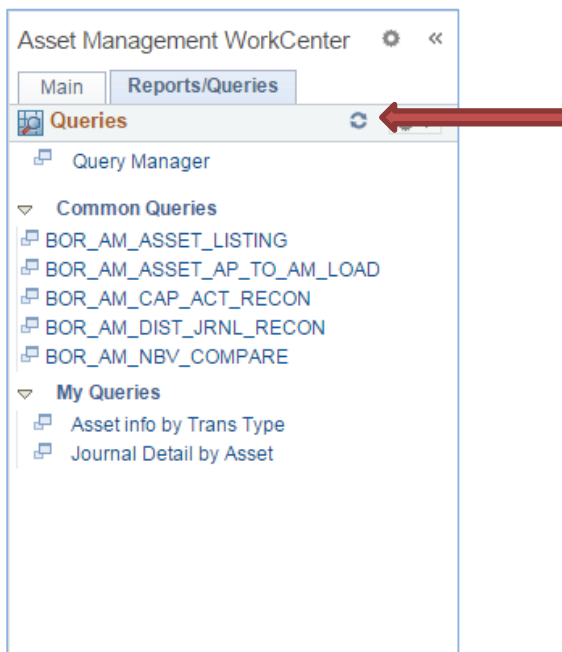
- Click the **Override Title/Description** checkbox.
- This will allow you to change the query **Description** that will appear in the list.



4. A message will state that you need to refresh the pagelet to see your changes. **Click OK.**



5. Click the **refresh** button in the WorkCenter menu to view changes that were made.



### Adding Links and Reports to WorkCenters

Currently, only ITS can update the Links section and the Reports section to include additional links and reports. If there are additional links or reports you would like to add, please submit a ticket to the ITS Helpdesk to request them.