



# UVM Business Manager WorkCenter

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## Background and Overview

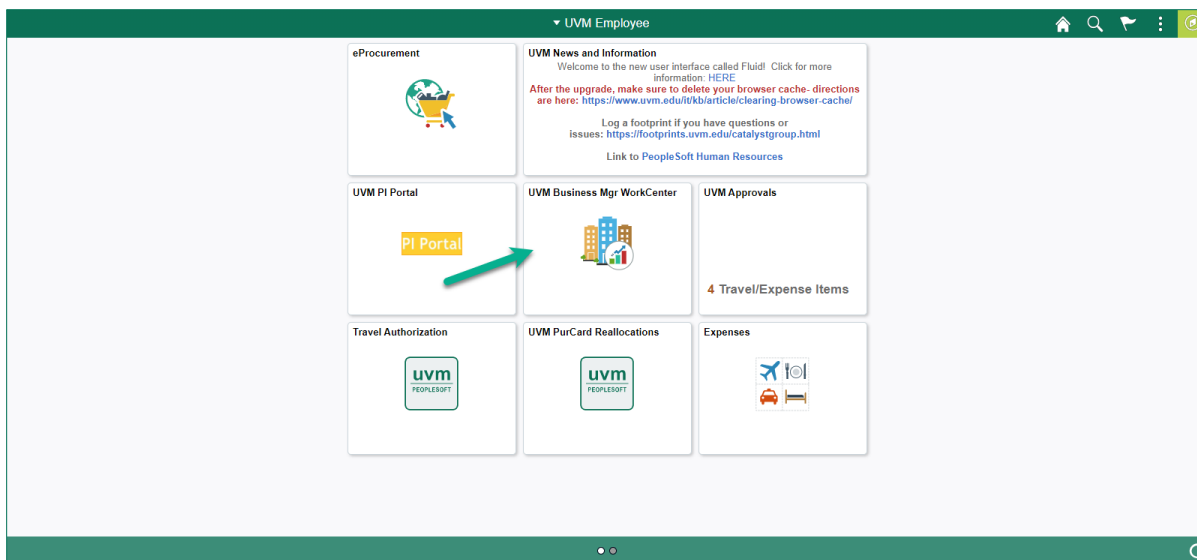
PeopleSoft WorkCenters allow users to access their most commonly used reports, queries, pages and processes in a single location.

Each WorkCenter has a group for Links, Queries, and Reports/Processes.

**Note:** WorkCenter content is dependant on a user's security access, and thus may vary by user. For example if a user does not have acces to a page, report, process, or query linked in the WorkCenter, that user will not see that link in their WorkCenter.

## Access the UVM Business Manger WorkCenter

Access the UVM Business Manager WorkCenter in [PeopleSoft FSCM](#) on the **UVM Employee Homepage**.



## Overview

Available items are displayed in organized groups on the left side of the WorkCenter.

The right hand side is a transaction area, or workspace, where many of the links you access will be displayed and used. The default setting for the UVM Business Manager WorkCenter is to display the Query Viewer in the transaction area.



**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

[Advanced Search](#)

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
UV_EX_EMP_NOTIFY_CA	Delinquent CA Notify	Private		HTML	Excel	XML	Schedule	Lookup References	--
DT_TEST_PURCARD_QRY	UVM Test PurCard Query	Public	PURCHASING	HTML	Excel	XML	Schedule	Lookup References	--
UV_AP_ENTERED_BY	Who E			L	Excel	XML	Schedule	Lookup References	--
UV_AP_UNRECONCILED_CHECKS	Unrec			L	Excel	XML	Schedule	Lookup References	--
UV_AR_CASHBYDEPTID	List of deposits by Dept id	Public		HTML	Excel	XML	Schedule	Lookup References	--
UV_AR_MISCPAYMENT	A list of Misc payments	Public		HTML	Excel	XML	Schedule	Lookup References	--
UV_CASH_ADVANCES_DUE		Public		HTML	Excel	XML	Schedule	Lookup References	--
UV_CASH_ADVANCE_MAX	Amount of Max Cash Advance	Public		HTML	Excel	XML	Schedule	Lookup References	--
UV_CASH_ADV_TRAV_AUTH_REF	Cash Adv x-ref to Travel Auth	Public		HTML	Excel	XML	Schedule	Lookup References	--

Expand or collapse a group by clicking the **Arrow** icon next to the group name.

Click a link name, and the navigation destination will appear in the transaction area to the right of the menu, where you can complete your search or task, while the left menu remains available to you.

**Note:** Some links are configured to launch a new tab in the browser, particularly those links that have a destination outside of the PeopleSoft application.

**Create/Update Journal Entries**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Search Criteria**

Use Saved Search:

Business Unit =

Journal Date =

Journal ID = begins with

Document Sequence Number = begins with

Line Business Unit =

Journal Header Status =

Budget Checking Header Status =

Workflow Status = begins with

Source =

Entered By = begins with


Attachment Exist =

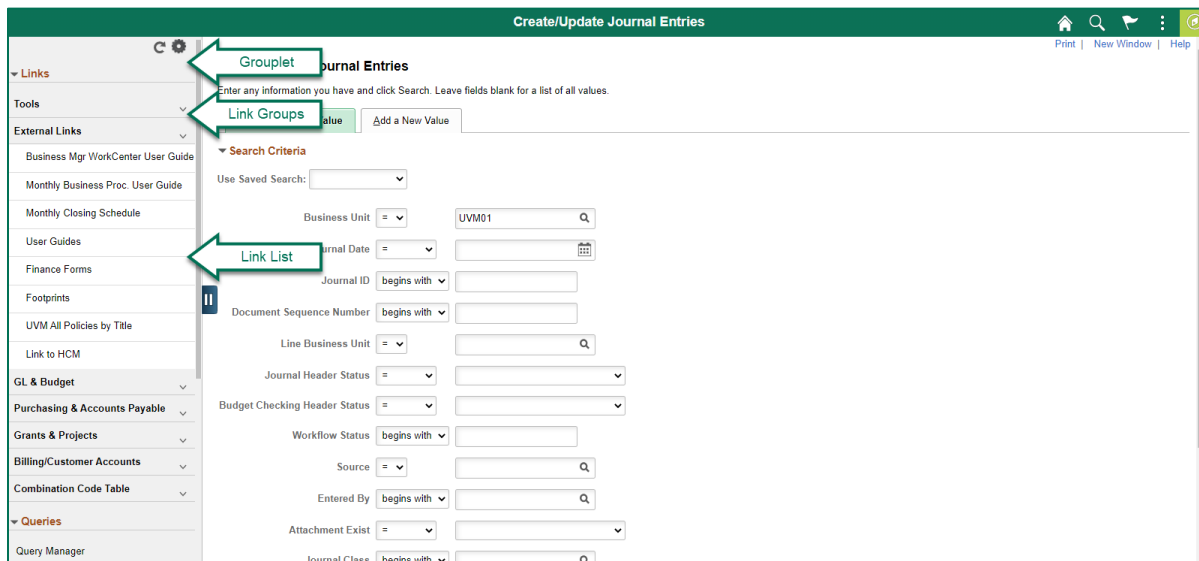
Journal Class = begins with



## WorkCenter Content

### Links

The Links grouplet is the first to be displayed in the WorkCenter, displaying the available **Link Groups**. Within each Link Group is a **Link List**. Link Lists are organized and grouped by function. Use the **Arrow**  next to a link group to expand or collapse it. In this example, the External Links section is expanded.



### Tools


The Tools section in the Links grouplet contains a variety of links within PeopleSoft including Query Viewer, Process Monitor, Report Manager, Accounting Tags, Delete Run Control IDs, User Defaults, and Preferences.

### External Links

The External Links section in the Links grouplet contains a variety of links including helpful documentation, forms, Footprint help desk ticket submission, and more. Most of these links will open in a new browser tab. This allows the user to continue working in their PeopleSoft session while accessing an external resource.



## Queries

The Queries grouplet contains the available **Query Groups**. Within each Query Group is a **Query List**. Query Lists are organized and grouped by function. Use the **Arrow**  next to a link group to expand or collapse it. At the top of the Queries grouplet is a built in link to Query Viewer or Query Manager, based on your access.

## Reports/Processes

The Reports/Processes grouplet contains only one group labeled Reports. The Reports List contains frequently used reports and processes.

## Personalization

WorkCenters can be personalized to open grouplet and groups as collapsed or expanded, reorder groups or pages within a group as well as adding groups and pages. For details on how to personalize the UVM Business Manager WorkCenter view the [PeopleSoft Tips User Guide](#).

## Frequently Asked Questions

### Can the WorkCenter be added to My Favorites or the NavBar?

Yes, once you have the WorkCenter open click the **Action Menu**  icon, then click Add to Favorites or Add to NavBar.

### Why does my WorkCenter look different than my colleague's? I can't see some of the links that they can see.

There could be a couple of reasons for this. The content that you see in your WorkCenter depends on the security that was set up for your user id. If you do not have access to a menu item or query that your colleague has access to, then you won't see these items in your WorkCenter.

You or your colleague may also have personalizations set up that would affect how the content is displayed. They may have added links or queries to personalize their WorkCenter, which is outlined in the [PeopleSoft Tips User Guide](#). If you need assistance with this, please log a [Footprint](#).



## Resources/Help

### Help/Footprints

Log a [PeopleSoft Helpdesk Footprint](#) for assistance creating, inactivating, or working with Accounting Tags.

### Suggestions? Updates?

Send an email to [PS9-1Upgrade@uvm.edu](mailto:PS9-1Upgrade@uvm.edu).