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 tab for pages/links and another for reports, processes, and queries.

Please note: WorkCenter content is dependent on a user’s security access, and thus may vary by user. For example, if a user does not have access 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 Manager WorkCenter in PeopleSoft FSCM by navigating to: Main Menu > *UVM System > UVM Business Manager

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 most of the links you access will be displayed and used.

Some links are configured to launch a new tab in the browser, particularly those links that have a destination outside of the PeopleSoft application.
Expand a group by clicking its corresponding arrow icon. Click the link name, and the navigation destination will appear in the transaction area, where you can complete your search or task, while the left menu remains available to you. Again, some links are configured to automatically open in a new window.
Please note: Although some links are configured to always open in a new window, a user can choose to have any link open in a new window.

Even the links that are configured to open in the WorkCenter’s transaction area will open in a new window by clicking this icon instead of the link name.
WorkCenter Pagelets/Content

Links Pagelet

The WorkCenter opens on the Links tab. Links are grouped by function. Use the arrows to expand or collapse a group. In this example, the External Links section has been expanded.

The External Links section on the Links tab contains a variety of links including helpful documentation, forms, Footprints help desk ticket submission, and more.

Many of these links will open in a new browser tab, as their destinations are not PeopleSoft pages. This allows the user to continue working in their PeopleSoft session while accessing the external resource.
Reports/Queries Pagelets

The Reports/Queries tab contains commonly used Inquiries, Tools, Reports and Processes in the Reports/Processes pagelet.

Below that, the Queries pagelet contains frequently used PeopleSoft queries, which are grouped by the nature of the data returned.

- **Inquire**
  - GL - Ledger Inquiry
  - GL - Ledger Period Comparison
  - Grants - Award Profile
  - KK - Activity Log
  - KK - Budgets Overview

- **Tools**
  - Query Viewer
  - Process Monitor
  - Report Manager

- **Reports**

- **Queries**
  - Query Manager
  - AR & Billing Queries
  - GL Queries
  - Grants Queries
  - KK Queries
  - Project Costing Queries
  - Purcard & Purchasing Queries
  - Travel & Expense Queries
  - Other Queries
Expand a query group by clicking the arrow to the left of it, then click the query name to access the Query Viewer page and run the selected query in the transaction area.

In this example, the user has expanded the GL Queries group, and selected the UV_GL_JRNL_INQUIRY query.

When run, the query will display results in the transaction area, while the WorkCenter pagelets remain available for the next task on the left side of the page. Results can be downloaded to Excel by clicking the Excel Spreadsheet link shown below the criteria fields.
Advanced Topic: Personalization Options

Content forthcoming.
Additional Resources

- PeopleSoft Login

Suggestions? Updates? Please log a footprint at https://footprints.uvm.edu/catalystgroup.html

Please let us know if you have an idea for a report, query or page that you think we should add to the WorkCenter.