PeopleSoft Financials
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 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 through the pagelet on the Home page.

Or, navigate 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 many of the links you access will be displayed and used.
Expand 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.

Please 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.

However, if desired you can open any link in a new window instead of the transaction area:
WorkCenter Pagelets/Content

Links Pagelet

The WorkCenter opens on the **Links** tab, 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.

The **External Links** section on the Links tab contains a variety of links including helpful documentation, forms, Footprints 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.
**Reports/Queries Pagelets**

The **Reports/Queries** tab contains two pagelets:

- The Reports and Processes pagelet houses Inquiries, Tools, Reports and Processes. Click a link to access the item in the transaction area. Click the icon next to the link to open that item in a new window.

- The Queries pagelet contains several frequently used public queries. Users who have access to Query Manager will see a built-in link to that tool here as well. Queries are grouped by the nature of the data returned.

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. Or, click the icon next to the link to open that query in a new window.

In this example, the user has expanded the GL Queries group, and selected the UV_GL_JRNL_INQUIRY query link.
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. Download results to Excel by clicking the Excel Spreadsheet link shown below the criteria fields.

**Advanced Topic: Personalization Options**

WorkCenters are built and maintained by the PeopleSoft team; however, there are personalization options that are defined at the user level. Personalizing the WorkCenter is not required for use, but may be helpful.

**Please note:** Personalization pages include pop-up boxes that may require scrolling. Click on the dotted handle in the lower right corner to resize the window as needed.
Navigate to the UVM Business Manager WorkCenter in PeopleSoft Financials through the pagelet on the Home page.

Or, navigate to: Main Menu > UVM System > UVM Business Manager

Click the **WorkCenter Settings** icon to:

- Reload the pagelets after personalizing.
- Access the personalization page to personalize the WorkCenter general layout (see instructions here).

Click the **Minimize WorkCenter** icon to hide the left pane. When you hide the left pane, the Show icon displays in the top left corner.

Click to minimize the left pane:
Once hidden, click the **Expand** icon to show the left pane:

### Personalizing the WorkCenter General Layout

A user may opt to personalize the general layout of their WorkCenter. The general layout personalization options include viewing, hiding, initially minimizing, and reordering pagelets.

Navigate to the UVM Business Manager WorkCenter in PeopleSoft Financials through the pagelet on the Home page.

Or, navigate to: Main Menu > UVM System > UVM Business Manager

Click the **WorkCenter Settings** icon, then click **Personalize**.
This example illustrates the fields and controls on the User Personalization page:

| User Personalization |  |

**Personalize UVM Business Manager**

Select from the available option(s) to personalize the display of each pagelet group in the UVM Business Manager.

**Pagelet Group:** Select Links or Reports/Queries. These options represent the primary tabs that display on the left pane of the WorkCenter. Depending on the option selected, the Pagelet Label displays the pagelet headings in the Pagelets grid.

**Pagelets:** After making a change to this grid, you must select the Reload option from the WorkCenter settings icon to reload the page and display your changes.

- **Pagelet Label:** Displays the pagelet headings that appear on the tab selected in the Pagelet Group field.

- **Selected:** Select to indicate that you want the pagelet displayed when accessing the WorkCenter. Deselect to hide the label and all links within the label.

- **Initially Minimized:** Select to indicate that you want the links within this pagelet label minimized, or collapsed, when accessing the WorkCenter.

- **Display Order:** Enter a number that represents the order in which the pagelet label (and associated links) is displayed when accessing the WorkCenter.

When finished, click **Save**. This typically refreshes the layout, but if it does not, click the **WorkCenter Settings** icon again, then click **Reload**.
Restoring General Layout Defaults

Restore general layout defaults at any time if needed.

Navigate to the UVM Business Manager WorkCenter in PeopleSoft Financials through the pagelet on the Home page.

Or, navigate to: Main Menu > UVM System > UVM Business Manager

Click the WorkCenter Settings icon, then select Personalize.

Click Reset to Defaults, then press Save to restore the defaults and return to the WorkCenter.

User Personalization

Personalize UVM Business Manager

Select from the available option(s) to personalize the display of each pagelet group in the UVM Business Manager.

```
<table>
<thead>
<tr>
<th>Pagelet Group</th>
<th>Links</th>
<th>My Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Initially Minimized</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Display Order</td>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>
```

Click Reset to Defaults, then press Save to restore the defaults and return to the WorkCenter.
Personalizing WorkCenter Pagelets

Users can minimize or personalize pagelets within the WorkCenter, to tailor the content and behavior of the Links, Reports/Processes, and Queries sections.

The following illustrates the basic personalization options, as well as how to add queries, links, and PeopleSoft menu items to the WorkCenter.

General personalization options:

Click the Pagelet Settings icon and select one of the available options: Minimize or Personalize.

- **Minimize**: Minimizes the pagelet. The system displays the pagelet heading and the available icons. To undo minimizing, click the Pagelet Settings icon again, then click Expand.

- **Personalize**: Access this page to modify the pagelet settings. This will only affect your WorkCenter.

To personalize a pagelet in your WorkCenter, click the Pagelet Settings icon, then click Personalize.
**Link Groups Settings**

A Link Group is a collection of individual links in the WorkCenter. The Link Groups that were created by the PeopleSoft team are available for personalization. Users can also add Link Groups, within which PeopleSoft Menu Items and other links can then be added.

**Start Group Collapsed:** Select to indicate that you want this group collapsed when entering the WorkCenter page. Deselect to indicate that you want this group expanded, displaying all links within the group, when entering the WorkCenter page.

**Display Order:** This is the order in which the link group appears on the pagelet. If desired, assign display order values to move any or all link groups’ positions in the pagelet. For example, to move the Footprints link to the bottom, change the value of 50 in the Display Order field to a value greater than 99. There is no requirement to use any specific numbering, however it may be helpful to space out the numbers to facilitate future reordering, or insertion of new links between existing links.

**Please note:** this example is showing the first of 5 Link Groups. Use the View All link or the Scrolling Arrows to modify the display order, or any other settings for other Link Groups.
### Link List Settings

**Display Order:** Enter the order in which you want this link to appear on the pagelet if desired. If no order is assigned, the items will display in alphabetical order. If you use this feature, it may be helpful to increment the display order values by 5 or 10, to accommodate reordering/insertion of new links between existing links.

**Show Link:** Select to indicate that you want this link to appear. Deselect to indicate that you do not want this link to appear when accessing the WorkCenter.

**Starting Page:** This checkbox will be accessible for PeopleSoft pages. Click the box to indicate that this is the page you wish to land on when accessing the WorkCenter.

**Open in New Window:** Select to indicate that you want this link to open in a new browser tab. Deselect and the link will open in the current tab of your browser.

After making any personalization settings changes, click **Save**, then close the personalization page by clicking the x in the upper right corner.

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**Define User "Links" Links**

**Links Pagelet Personalization**

**Configuration ID:** UVM\_BUSINESS\_MGR  
**User ID:** jmulac

**Display Order:** Enter the order in which you want this link to appear on the pagelet if desired. If no order is assigned, the items will display in alphabetical order. If you use this feature, it may be helpful to increment the display order values by 5 or 10, to accommodate reordering/insertion of new links between existing links.

**Show Link:** Select to indicate that you want this link to appear. Deselect to indicate that you do not want this link to appear when accessing the WorkCenter.

**Starting Page:** This checkbox will be accessible for PeopleSoft pages. Click the box to indicate that this is the page you wish to land on when accessing the WorkCenter.

**Open in New Window:** Select to indicate that you want this link to open in a new browser tab. Deselect and the link will open in the current tab of your browser.

After making any personalization settings changes, click **Save**, then close the personalization page by clicking the x in the upper right corner.

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Continue to the next page for instructions on creating Link Lists and adding Links to the pagelet.
Personalizing Pagelets: Adding Link Groups and Link Lists

Navigate to the UVM Business Manager WorkCenter in PeopleSoft Financials through the pagelet on the Home page.

Or, navigate to: Main Menu > UVM System > UVM Business Manager

Select the pagelet on which the new link or menu item will be added, click the Pagelet Settings icon, then select Personalize. In this example, the user is adding new links to the Links pagelet.

Please note: you can add links and menu items to the Links and Reports/Processes pagelets. On the Queries pagelet, only queries may be added.

Add a group, using the + sign in the top right corner.
In the Link Groups section, enter a Group Label and Display Order value to indicate the order you want this new link group to appear in the Links pagelet. Use the View All link or the scrolling arrows to view or modify the Display Order for other groups as needed. Select the Start Group Collapsed checkbox if you want this group to be collapsed when you access the WorkCenter.
Now, you can add links to the **Link List**. By default, the system is set to add PeopleSoft Menu Items. To add a PeopleSoft Menu Item, click **Define**.

In the **Define Link** box, click **Select Menu Item**.
A tree structure containing the menu items that you can access will appear. Expand the menu items to navigate and select the item you wish to add to your WorkCenter pagelet. In this example, the user is adding a Billing module item, labeled **Review Entries by Invoice**.

After selecting the desired menu item, the **Define Link** box will reappear. Click the Override Label checkbox and enter a new menu item label if you would like to modify the name of the menu item, or click OK to add the menu item with its existing label.
The Links Pagelet Personalization box will reappear.

![Links Pagelet Personalization](image)

The **Show Link** checkbox is checked by default, to indicate that you want this link to appear in your WorkCenter Links pagelet.

Links are displayed in alphabetical order by label, or you can specify the order by adding a numeric value to the **Display Order** field. If you use this feature, it may be helpful to increment the display order values by 5 or 10, to accommodate reordering/insertion of new queries between existing queries.

To flag this Link as the landing page for your WorkCenter, click the **Starting Page** checkbox.

Select the **Open in New Window** checkbox, if you want this link to open on a new tab in your browser whenever the link is clicked in your WorkCenter. **Please note: selecting Open in New Window will disable the Starting Page checkbox, and vice versa. All links that are external to PeopleSoft should be configured to open in a new window.**

Use the + button in the Link List section to add more links to your Link Group. To delete a row from this section, click the – button, or uncheck the Show Link checkbox to retain the link, but remove it from view in the WorkCenter.

The following page contains steps to illustrate how to add a URL instead of a PeopleSoft menu item.
In the Link List grid, click **Define**.

In the **Define Link** box, change the Link Type value to URL.
In the URL ID field, copy/paste or type in the URL that you want to have displayed as a link in your WorkCenter.

If you want the link to show a shortened nickname instead of the URL itself, enter that in the Label field. This is often used for External Links, so that a meaningful name is displayed in the WorkCenter instead of a website address.

Define Link

In the URL ID field, copy/paste or type in the URL that you want to have displayed as a link in your WorkCenter.

If you want the link to show a shortened nickname instead of the URL itself, enter that in the Label field. This is often used for External Links, so that a meaningful name is displayed in the WorkCenter instead of a website address.

Define Link

Click OK.

The Show Link checkbox will be selected by default, to indicate that you want this link to appear in your WorkCenter Links pagelet. If you do not wish to display a link in your WorkCenter at any time, you can return to this page and uncheck that box.

If you would like this Link to be the landing page for your WorkCenter, click the Starting Page checkbox.

Select the Open in New Window checkbox, if you want this link to open on a new tab in your browser whenever the link is clicked in your WorkCenter.

Selecting Open in New Window will disable the Starting Page checkbox, and vice versa. It is recommended to have all links that are external to PeopleSoft open in a new window.

Continue to add links to this group using the + button on the right side of the Link List section, or create additional Link Groups as needed. To delete a row from a Link List, click the – button on that row.

When finished, click Save, then click OK when this message appears:
Click the x in the upper right corner of the Links Pagelet Personalization page to return to the WorkCenter. This typically refreshes the pagelet content, but if needed, press Reload to apply the changes.
Personalizing Pagelets: Adding Query Groups and Queries

Before adding queries, you will need to know the query name, and whether each is Public or Privately owned. The owner of a query is displayed in search results and favorite queries in Query Viewer.

Navigate to the UVM Business Manager WorkCenter in PeopleSoft Financials through the pagelet on the Home page.

Or, navigate to: Main Menu > UVM System > UVM Business Manager

Click the Reports/Queries tab. On the Queries pagelet, click the Pagelet Settings icon, then select Personalize.
Add a group, using the + sign in the top right corner.

In the example shown below, the user is adding one of their frequently used queries to their WorkCenter.

In the **Query Groups** section, enter a **Group Label** and **Display Order** value to indicate the order you want this new query group to appear in the **Queries** pagelet. Use the **View All** link or the scrolling arrows to view or modify the Display Order for other groups as needed. Select the **Start Group Collapsed** checkbox if you want this group to be collapsed when you access the WorkCenter.
In the **Owner** dropdown, select **Public Owner** or **Private Owner** (queries in PeopleSoft are either public or private). Enter the Query Name, or search for it from the magnifying glass lookup icon. The value in the **Description** field is what will be displayed in your WorkCenter. If you wish to have the query name displayed instead, click the **Override Title/Description** checkbox, and copy/paste the query name into the **Description** field.

Queries are displayed in the WorkCenter in alphabetical order by the query description (not query name). You can specify the query order by adding a numeric value to the **Display Order** field. If you use this feature, it may be helpful to increment the display order values by 5 or 10, to accommodate reordering/insertion of new queries between existing queries.

The **Show Link** checkbox will be selected by default, to indicate that you want this query to appear in your WorkCenter Queries pagelet.

If you would like this query to be the landing page for your WorkCenter, click the **Starting Page** checkbox.

Continue to add queries to this group using the + button on the right side of the Query Definition section, or create additional groups of queries as needed. To delete a row from this section, click the – button.

When finished, click Save, then click OK when this message appears:

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**Message**

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

OK

Click the x in the upper right corner of the Queries Pagelet Personalization page to return to the WorkCenter. This typically refreshes the pagelet content, but if needed, press **Reload** to apply the changes.
Please note: Although query personalization does not include a setting to force a query to open in a new window, any query can be run in a new window by clicking the icon shown below. Clicking the query name will open the selected query in PeopleSoft Query Viewer in the WorkCenter transaction area.
Deleting Pagelet Personalizations

Navigate to the UVM Business Manager WorkCenter in PeopleSoft Financials through the pagelet on the Home page.

Or, navigate to: Main Menu > UVM System > UVM Business Manager

On the tab and pagelet you would like to delete personalizations from, click the Pagelet Settings icon, then click Personalize.

Click Delete Personalization to remove all personalizations from this pagelet. This will remove any settings changes and any new groups/items that have been added, restoring the pagelet to its original state.
When this message appears, click OK to continue with the deletion, or click Cancel to stop the deletion and return to the pagelet personalization screen.

This will delete your Links personalization. Select OK to continue or Cancel to cancel deletion. (7980,81)

If you have clicked OK, the following message will appear.

Personalization has been deleted. (7980,82)

Click OK, then click the x in the upper right corner to return to the WorkCenter. This typically refreshes the layout, but if it does not, click the Pagelet Settings icon again, then click Reload.
FAQs

**Question 1:** Can I get to the Business Manager WorkCenter easily if I have navigated away from it? **Answer:** Yes, click the Home link in the upper right of the screen.

Once you’re on the Home Page, the pagelet with a link to the WorkCenter is available above the left-hand menu.

Alternatively, you can navigate using the Main Menu or the Left-Hand Menu. The navigation path is: UVM System > UVM Business Manager.

**Question 2:** Can the WorkCenter be added as a Favorite?  
**Answer:** Yes! Once you have the WorkCenter page open, click Favorites, then click Add to Favorites.
**Question 3**: Why does my WorkCenter look different than my colleague’s? I can’t see some of the links that they can see.

**Answer**: 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 those 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 this section of the guide. If you need assistance with this, please enter a ticket in Footprints for assistance.

**Additional Resources**

- [PeopleSoft Login](#)
- [PeopleSoft User Guides](#)

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