

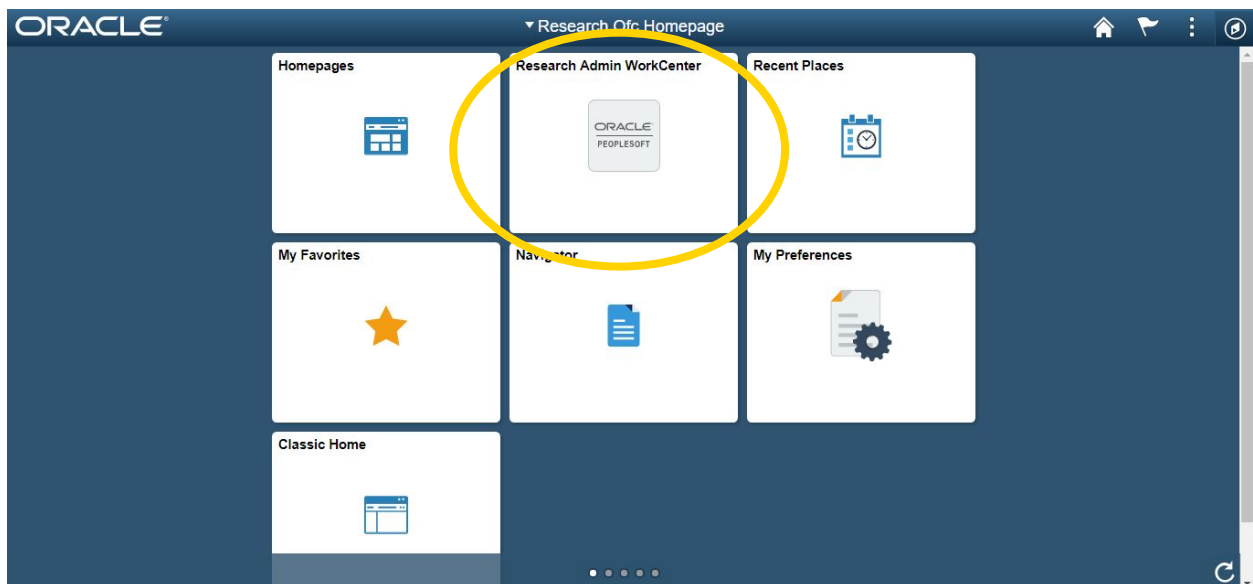
UD Financials Job Aid

Research Admin WorkCenter

Overview: The WorkCenter is a page for UD Financials users to access all of the areas they normally navigate to from one central area. The WorkCenter reduces the need to navigate through the NavBar (the replacement for breadcrumbs in UD Financials 9.2). Individual users have the ability to heavily personalize their WorkCenter pages by adding/removing whatever links and queries they please.

Navigation: Grants > Research Admin WorkCenter

OR via the "Research Admin WorkCenter" tile on your homepage



WorkCenter Layout



There are two areas in the WorkCenter: The “Task Panel” on the left and the “Work Area” on the right. The Task Panel in the image above contains two “pagelets”: Links and My Work.

Task Panel

The Task Panel has two tabs: Main and Reports/Queries. The Main tab contains a Links pagelet with links to both areas within UD Financials and external URLs like UD websites and NSF guidelines. Users have the ability to customize this list as they see fit (See the “Personalization” section). The Main tab also contains a My Work pagelet, but this area will remain blank, as it is only used by a limited number of central Research Office employees.

The Reports/Queries tab contains links to the Process Monitor and the Report Manager. The Queries pagelet is initially blank, but much like the Links pagelet, users can add any queries that they have access to and use.

Work Area

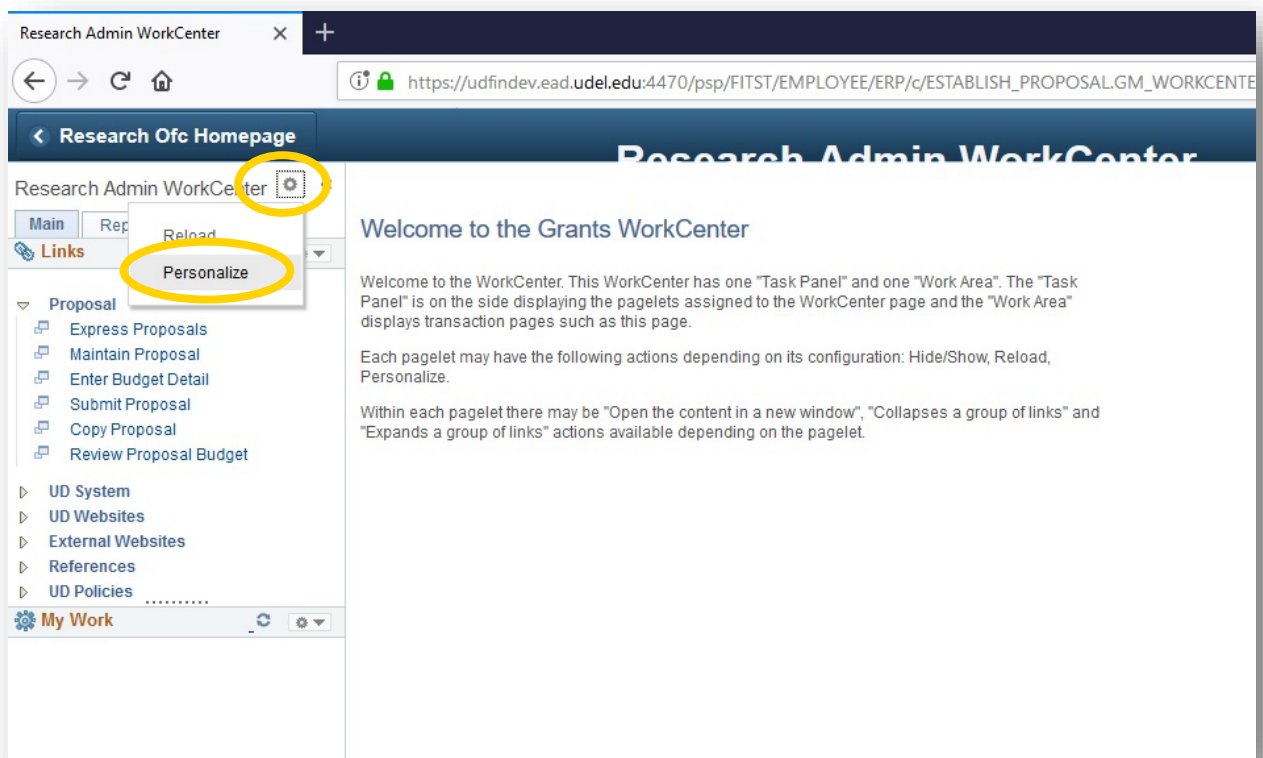
The Work Area is where the pages that are opened up in the Task Area appear. Most UD Financials pages will open within the Work Area, while any links that contain external URLs will open in a new tab/window (**NOTE: If external links initially do not open, make sure your pop-up blocker is not preventing them from opening**). In the Work Area you can use the pages you normally do while having constant access to the Task Area, which allows you to immediately navigate to a different page than the one you are currently working on.

Personalization

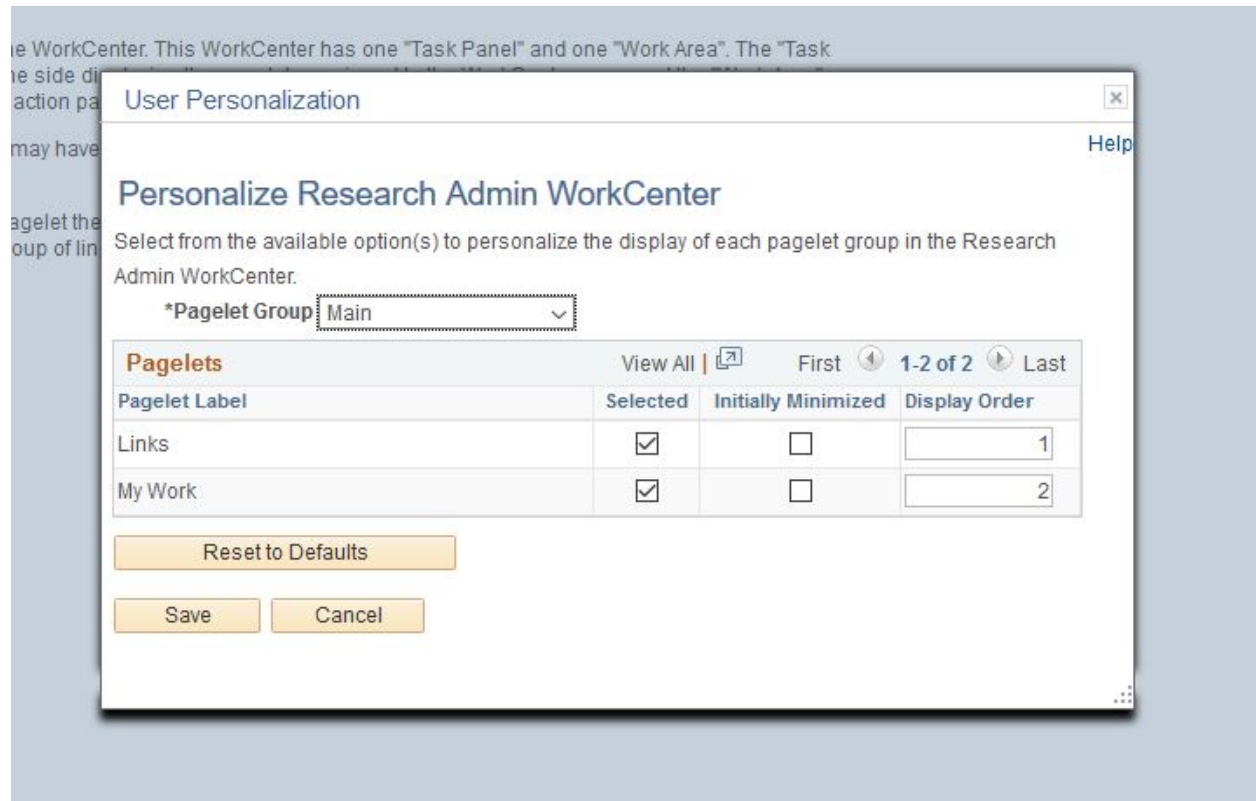
There are two levels of personalization available within the WorkCenter. Users are able to hide, minimize or reorder pagelets, as well as add or hide individual links, queries, and reports/processes within individual pagelets.

Hiding, Minimizing, and Reordering Pagelets

In order to minimize pagelets so that they do not appear as a full box when you enter your WorkCenter, click the gear icon next to the "Research Admin WorkCenter" heading on the top left of the screen. Click "Personalize."

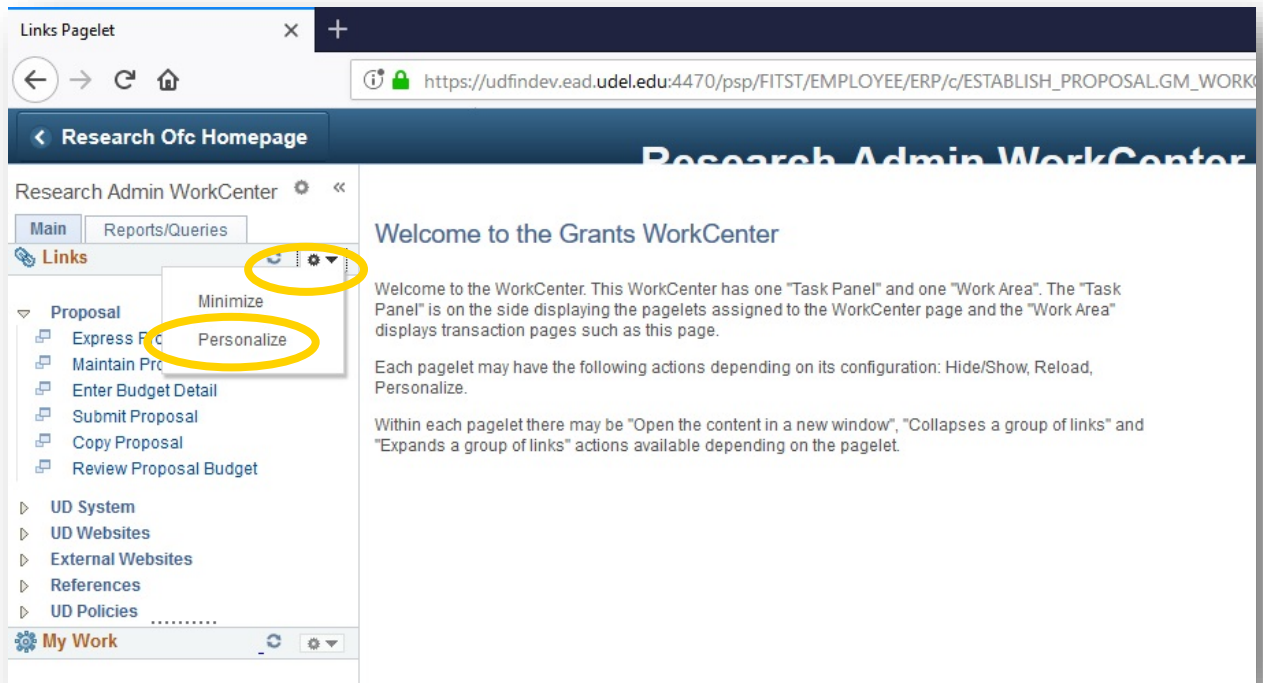


The user has 3 options for each pagelet. Unchecking the box in the "Selected" column will completely hide the pagelet when the user enters the WorkCenter. Checking the box in the "Initially Minimized" column will cause the pagelet to be minimized when the user enters the WorkCenter, but still visible. The "Display Order" column allows the user to determine which pagelet is on the top of the page, and which pagelet is on the bottom.

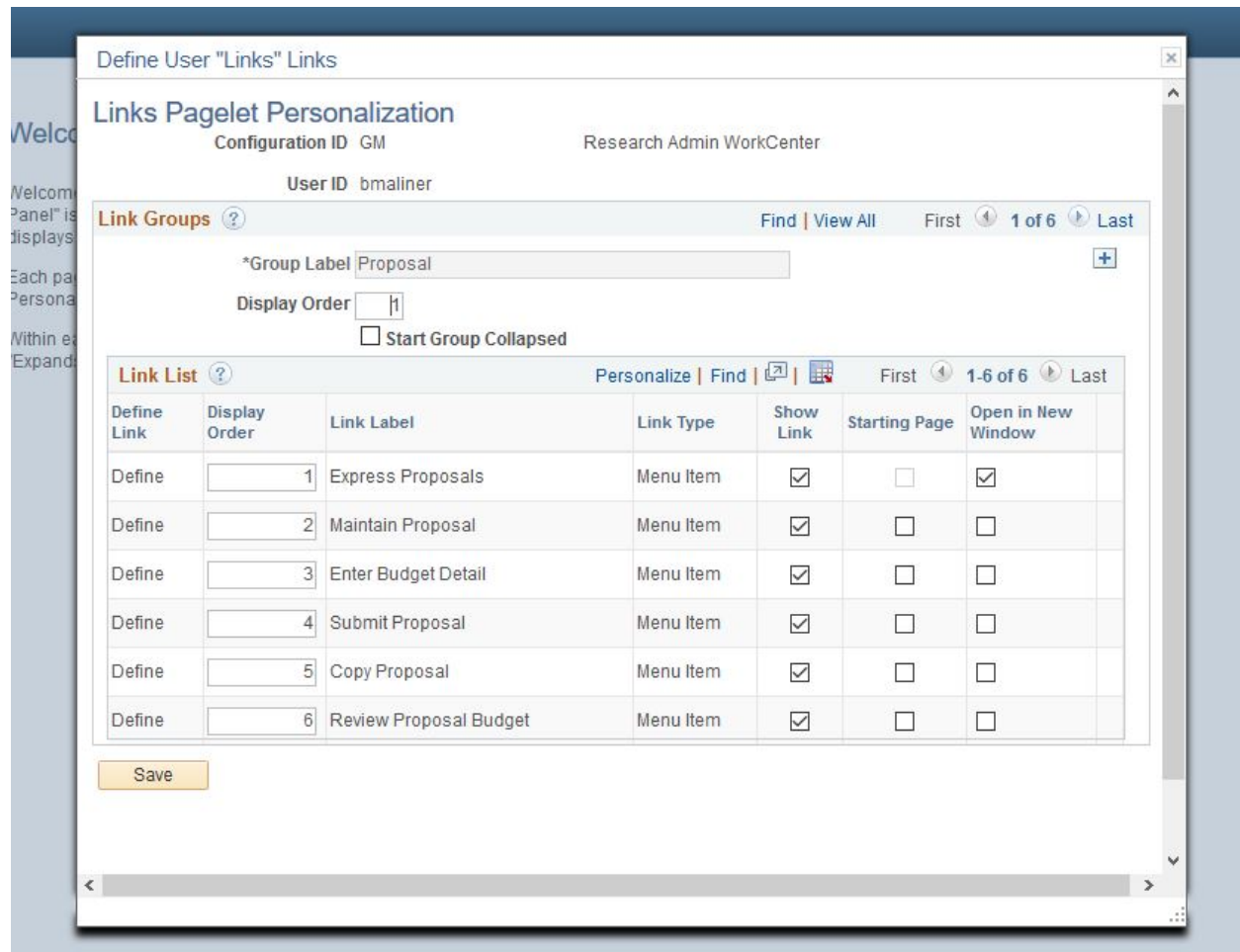


Individual Pagelet Personalization

In order to personalize what you see within an individual pagelet, click the gear icon next to the pagelet header. Click "Personalize."



On the Personalization screen, the user can change the order of the groups, decide whether to enter the WorkCenter with the groups opened or collapsed, hide links within the groups, and create a group to add personal links to.



In order to hide a link, simply uncheck the "Show Link" box for whatever link you wish to hide.

Checking a box under "Starting Page" will automatically open the link whenever you enter the WorkCenter.

Checking a box under "Open in a New Window" will open the link in a new tab/window. **(NOTE: If external links initially do not open, make sure your pop-up blocker is not preventing them from opening)**

Adding a Link: In order to add a link, click the plus sign on the top right of the "Link Groups" box. Title the group, and then click "Define." If the link is to a page within UD Financials, click "Select Menu Item" and navigate to the page you wish to link to.

If the link is to an external URL, click "URL" in the Link Type drop down menu. Put the URL in the URLID field, and the label of the link in the Label field. Click OK, Save, and refresh the WorkCenter to see your link.

References

UD Financials WorkCenter Documentation:

https://docs.oracle.com/cd/E39583_01/fscm92pbr0/eng/fscm/fspf/concept_UnderstandingWorkCentersAndDashboards.html

UD Financials WorkCenter Documentation:

<https://www.youtube.com/watch?v=gA4leaeSodU&feature=youtu.be>