9.2 Security Admin WorkCenter

Purpose: Use this document as a reference for using the Security Admin WorkCenter in ctcLink.

Audience: Local Security Administrators

> ⚠ You must have at least one of these centrally managed security roles:
>
> • Users will need either the ZZ Local Security Admin or the ZD Local Security Admin roles to View the workcenter, or in CS the ZZ Local SACR Security Admin also has access to the SACR areas.
>
> If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

> ℹ The Security Administration WorkCenter is designed to allow users to access their most commonly used pages, queries, and reports in a single location.

Using the Security Admin WorkCenter

Navigation: NavBar > Navigator > PeopleTools > Security > Security Admin WorkCenter
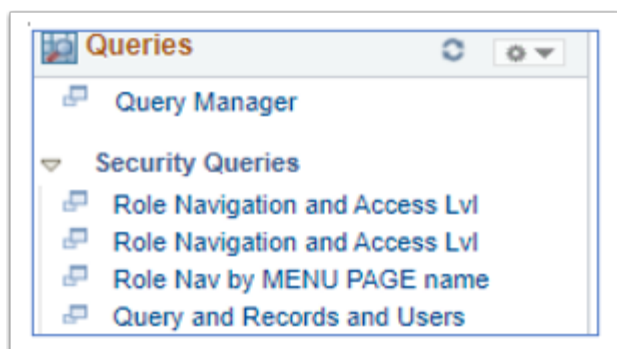
1. The **Security Admin WorkCenter** page displays. The pagelets menu displays on the left side of the page. Pagelets, or sections, of the WorkCenter menu, are broken into the categories Links, Queries, and Reports/Processes.

2. The **Links** section provides links to pages that are accessed frequently. The links that appear are determined during system setup. The primary purpose of this pagelet is to minimize the number of clicks to access components and external links. It includes links divided into collapsible sections.
3. Select the arrow next to the link section header to expand or collapse the section.
4. After expanding a section, the window can be resized by dragging the dotted handle '………' as needed.
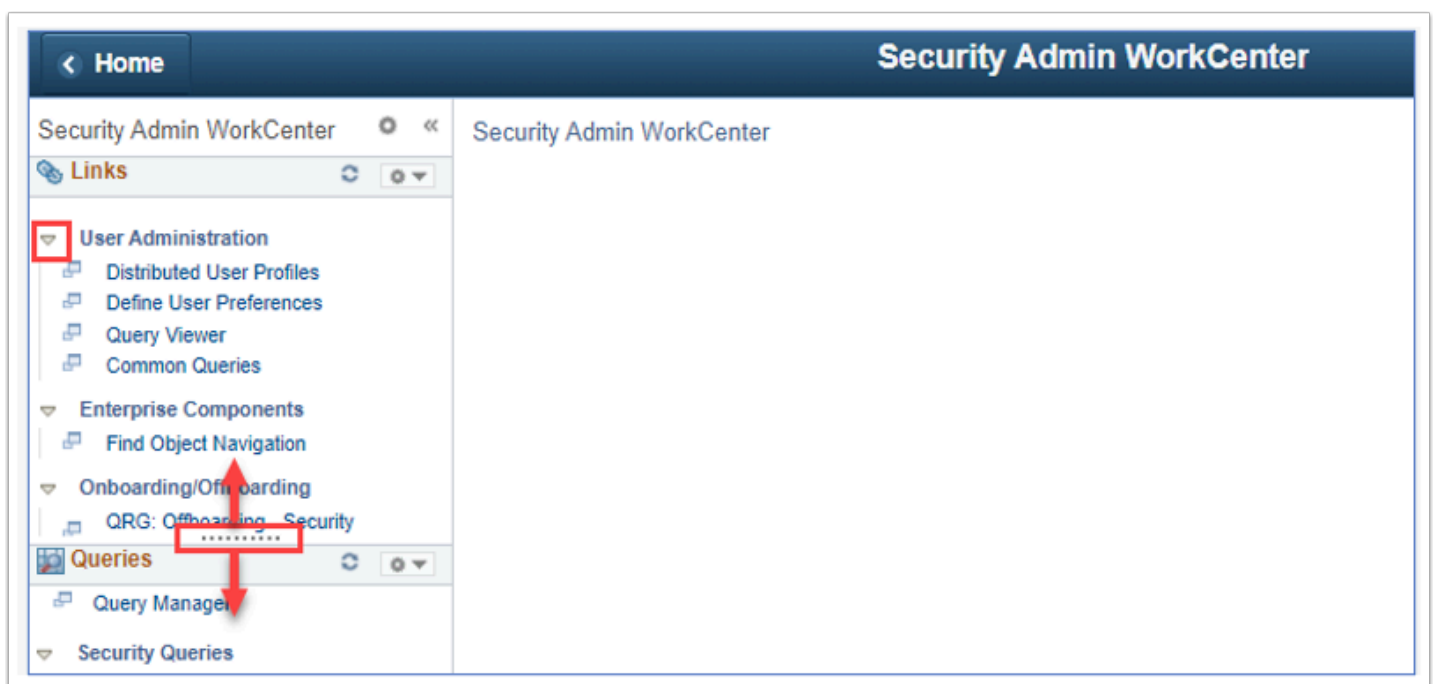
5. The **Queries** section includes links to queries that are accessed frequently. This section includes a link to Query Manager if assigned to the user, otherwise the Query Viewer link can be found in the **Links** section above.

6. The **Reports/Processes** section includes links to common reports and processes, including the Report Manager and Query Report Scheduler pages.
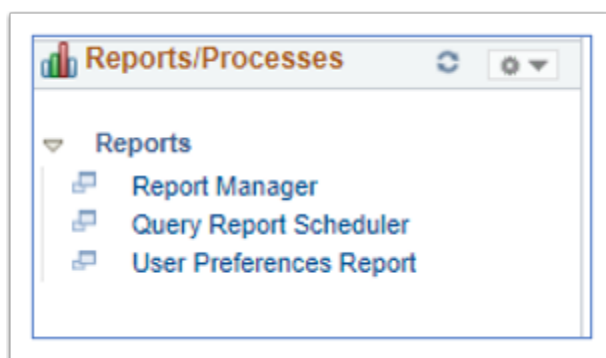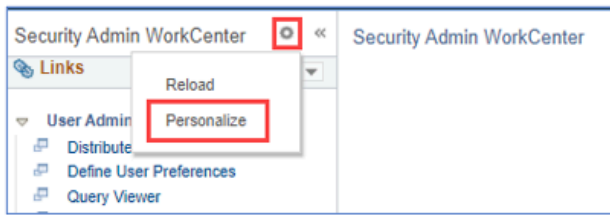

Personalizing the Security Admin WorkCenter

The Security Admin WorkCenter defaults with system-configured pagelets for links, queries, and reports/processes, but also allows for personalization by the user.

General WorkCenter Display Personalization

1. Click on the gear icon next to the Security Admin WorkCenter header to view available options:
   1. Reload - to refresh the WorkCenter page.
   2. Personalize - to update display options.

2. Select **Personalize** to change how the pagelets are displayed.

Options include:

- Selected only selected pagelets will be visible in the WorkCenter.
- Initially Minimized if checked, the pagelet is collapsed when the user navigates to the WorkCenter.
- Display Order sort by arranging the order of the numbers.

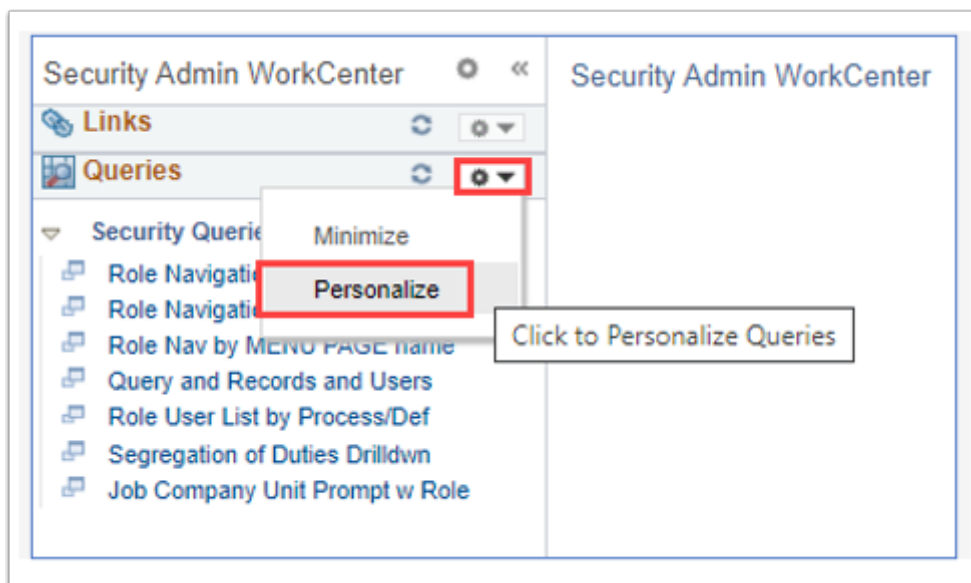3. Click **Save**. The page with reload with the selected options.

WorkCenter Pagelet Personalization

Pagelets (the sections in the WorkCenter menu defined as Links, Queries and Reports/Processes) allow for personalization so that the user can define display options and add new items to the WorkCenter.

To Add Queries

> ℹ️ In this example, a personalized list of favorite or frequently used queries will be added to the WorkCenter's Queries pagelet.

1. Click on the gear icon in the pagelet header.
   1. Minimize - collapses the pagelet/section
   2. Personalize - to configure pagelet options

2. From the drop-down options, select **Personalize**.

The **Define User Query Links** screen displays.

3. Select the plus icon to add a new Group.

A new Query Group record displays.

4. In the new Query Group's header section:
    1. Input a descriptive name in the **Group Label** field.
    2. Enter a **Display Order** for the new group (optional).
    3. Check the **Start Group Collapsed** box if preferred (optional).

5. In the Query Definition section:
    1. If there are multiple queries, the **Display Order** can be defined by inputting numbers in the order preferred.
    2. **Owner -** public or private query owner
    3. **Type -** query or pivot grid

4. **Override Title/Description -** check to input a personalized query title.
5. **Query Name -** Input the query name or use the lookup to search. Click on **Advanced Lookup** for additional search options.

- **Show Link -** Checked to display the query in the pagelet menu.
- **Starting Page -** used to display the selected link in the transaction space when the WorkCenter is launched (optional).

6. Select the **Plus icon** to add additional row(s) if needed.
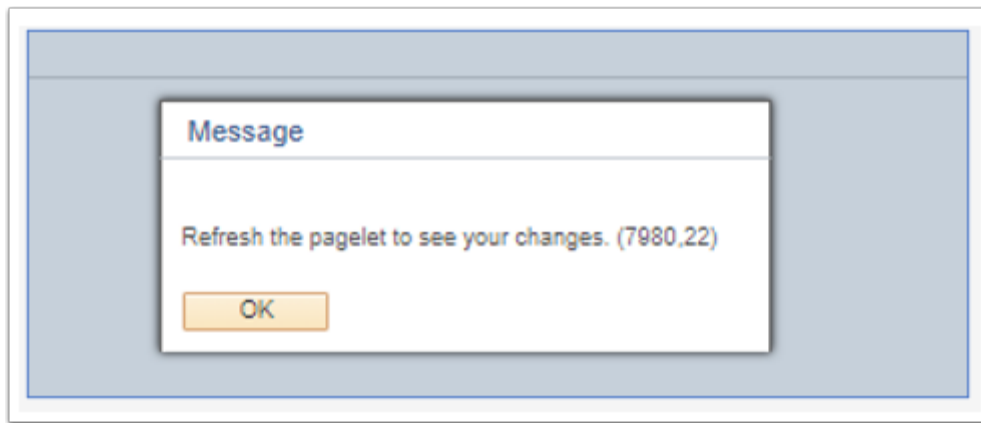
7. **Save** the changes.

8. A message will display reminding the user to refresh the pagelet to see the changes.
9. Select **OK.**
10. Close out the window to return to the Security Admin WorkCenter.
11. Click on the Refresh icon in the pagelet section header.
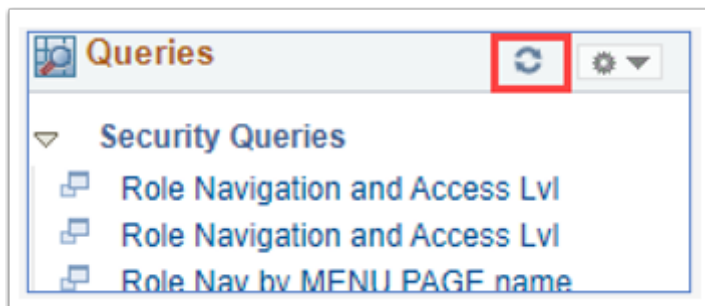
12. Section complete.

To Add Links

ℹ️ In this example, a frequently accessed menu path page and a favorite URL link will be added to the WorkCenter's Links pagelet.

1. Click on the gear icon in the pagelet header.
   1. Minimize - collapses the pagelet/section
   2. Personalize - to configure pagelet options.

2. From the drop-down options, select **Personalize**.
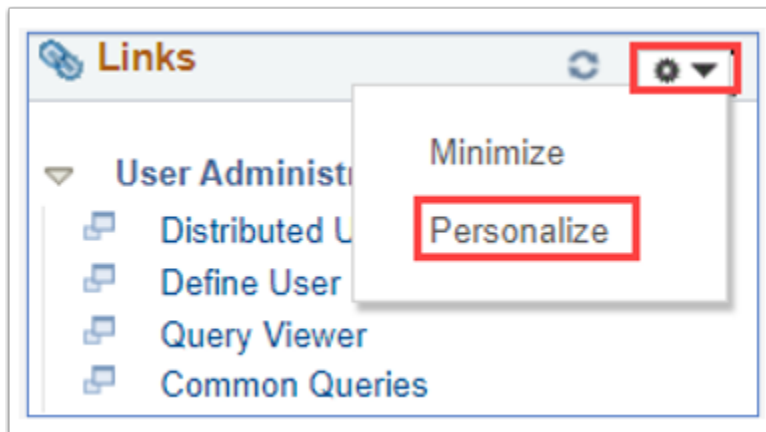
The **Define User Links** screen displays.

3. Select the **Plus icon** to add a new Group.

A new Link Groups record displays.

4. In the new **Link Groups** header section
    1. Input a descriptive name in the **Group Label** field.
    2. Enter a **Display Order** for the new group (optional). Note that in this example, there were four existing system configured groups, and this newly added group will be the fifth. Use the Display Order field to sort as needed.
    3. Check the **Start Group Collapsed** box if preferred (optional).

5. In the **Link List** section:
    1. **Define Link -** click on the Define hyperlink.

The Define Link page displays. Choose the **Link Type -** Menu Item or URL.
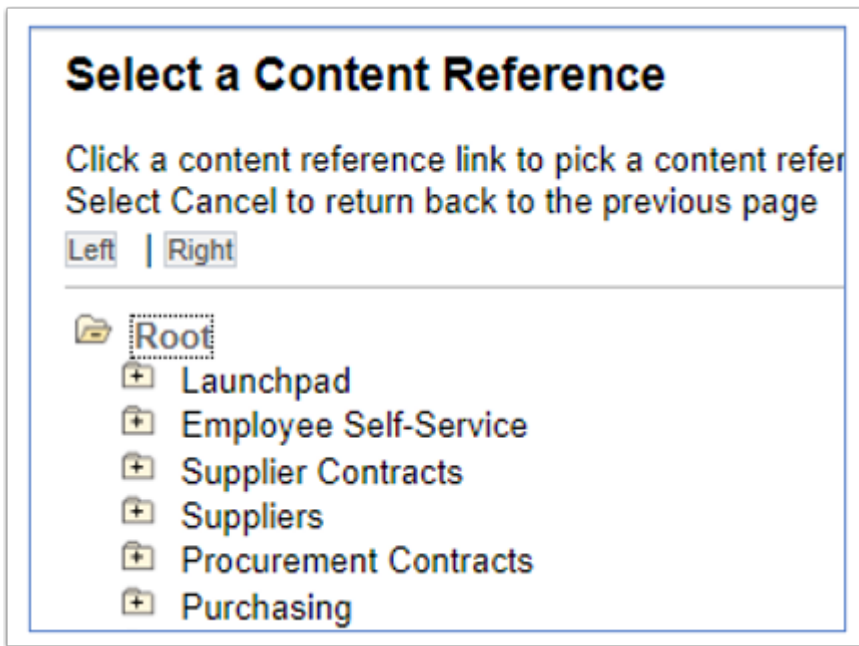

Choosing a Menu Item

Click on the **Select Menu Item** link. The **Select a Content Reference** page will open and available folders (based on the user's security access) will be listed. Click on the folders to expand them, following the navigation path to the page needed for the link.

In this example, the Pivot Grid Viewer is selected. Click on the blue page name.

Returning to the Define Link page, the chosen Menu Item Name and Label will display.

The link label can be changed by checking the Override Label box.

Click OK to return to the Define User Links page. After the link is defined, the remaining link options are available:

* Display Order to sort the order of the links in the group
* Show Link to show the link in the Links menu.
* Starting Page to default to open the link in the transaction area of the WorkCenter
* Open in New Window to open the linked page in a new tab.

Choosing an URL link

If defining a URL link rather than a Menu Item, in the Link Type field, click on the dropdown arrow, then choose URL.

Input or copy/paste a URL address into the **URLID** field.

Input a descriptive label in the **Label** field.

Click **OK** to save the entries and return to the Define User Links page. After the link is defined, the remaining link options are can be configured:

- Display Order - If there are multiple links, the display order can be defined by inputting numbers in the order preferred.
- Show Link - to show the URL link in the Links menu.
- Starting Page - to default to open the URL link in the transaction area of the WorkCenter
- Open in New Window - check to open the URL link in a new tab which is recommended as some URLs may not render properly.

6. **Save** the changes.
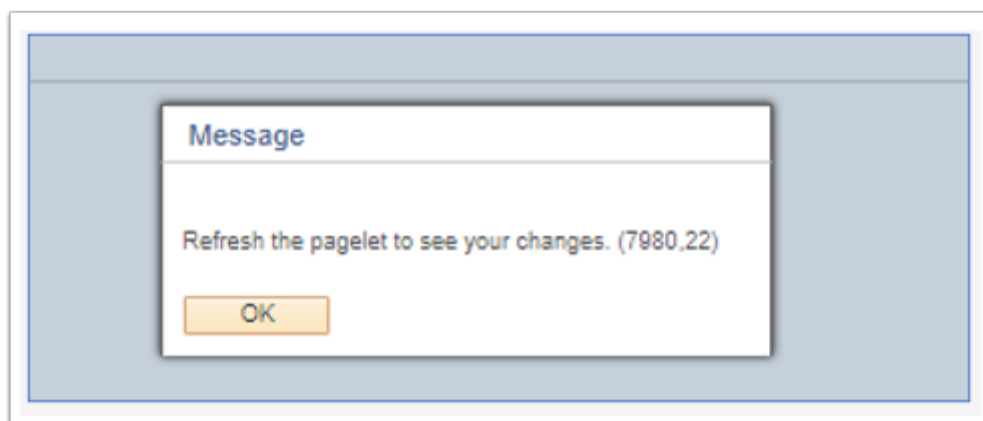
7. A message will display reminding the user to refresh the pagelet to see the changes.
8. Select **OK**.
9. Close out the window to return to the Security Admin WorkCenter.
10. Click on the Refresh icon in the pagelet section header.
11. Section complete.

To Add Reports

> ℹ️ In this example, a frequently used Report will be added to the WorkCenter's Reports pagelet.

1. Click on the gear icon in the pagelet header.
    1. Minimize - collapses the pagelet/section.
    2. Personalize - to configure pagelet options.

2. From the drop-down options, select **Personalize.**
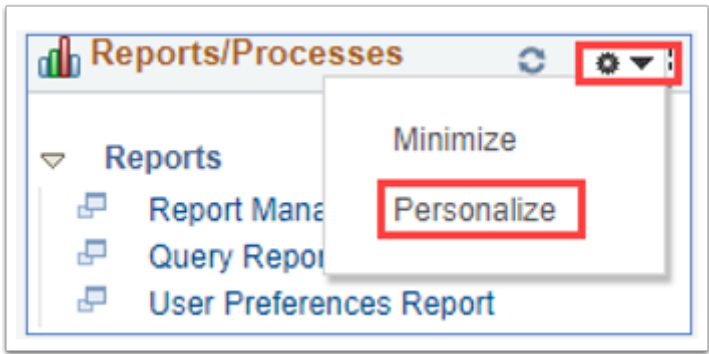
The **Define User Reports Links** screen displays.

3. Select the plus icon to add a new Group.
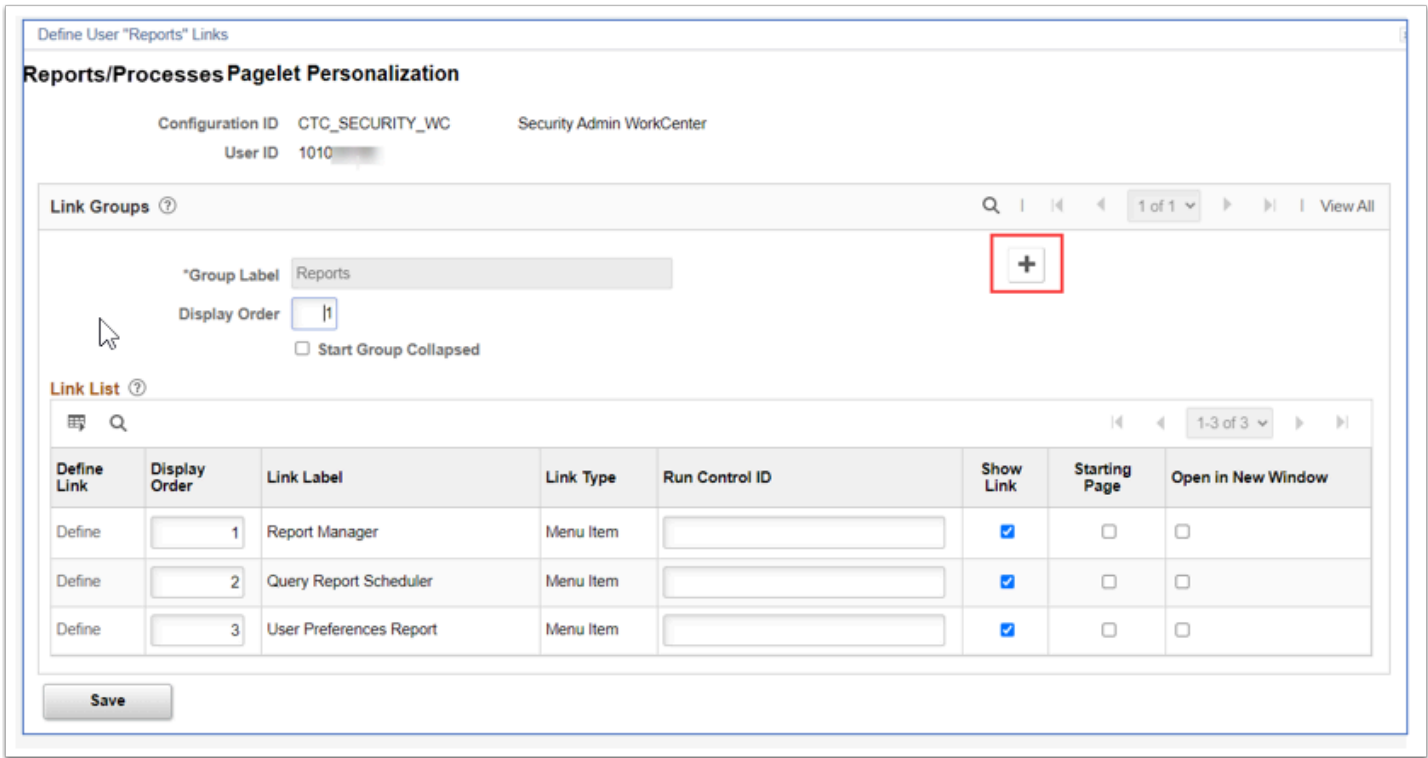
A new Report/Processes Group record displays.

4. In the new Link Groups header section:
   1. Input a descriptive name in the Group Label field.
   2. Enter a Display Order for the new group (optional).
   3. Check the Start Group Collapsed box (optional).

5. In the Link List section, click on the **Define** link.

Click on the **Select Menu Item** link. The **Select a Content Reference** page will open and available folders (based on the user's security access) will be listed. Click on the folders to expand them, following the navigation path to the report needed for the link.
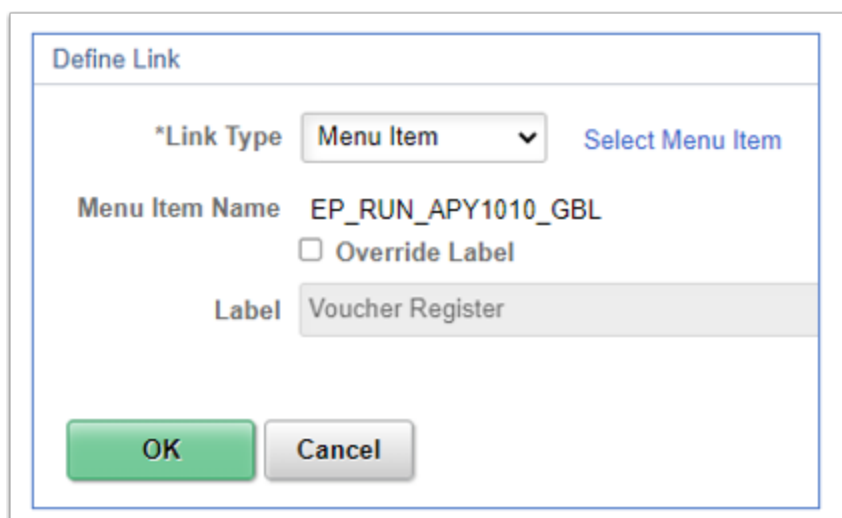
In this example, the Voucher Register is selected. Click on the report name in blue.

Returning to the Define Link page, the chosen Menu Item Name and Label will display.

The report label can be changed by checking the Override Label box.
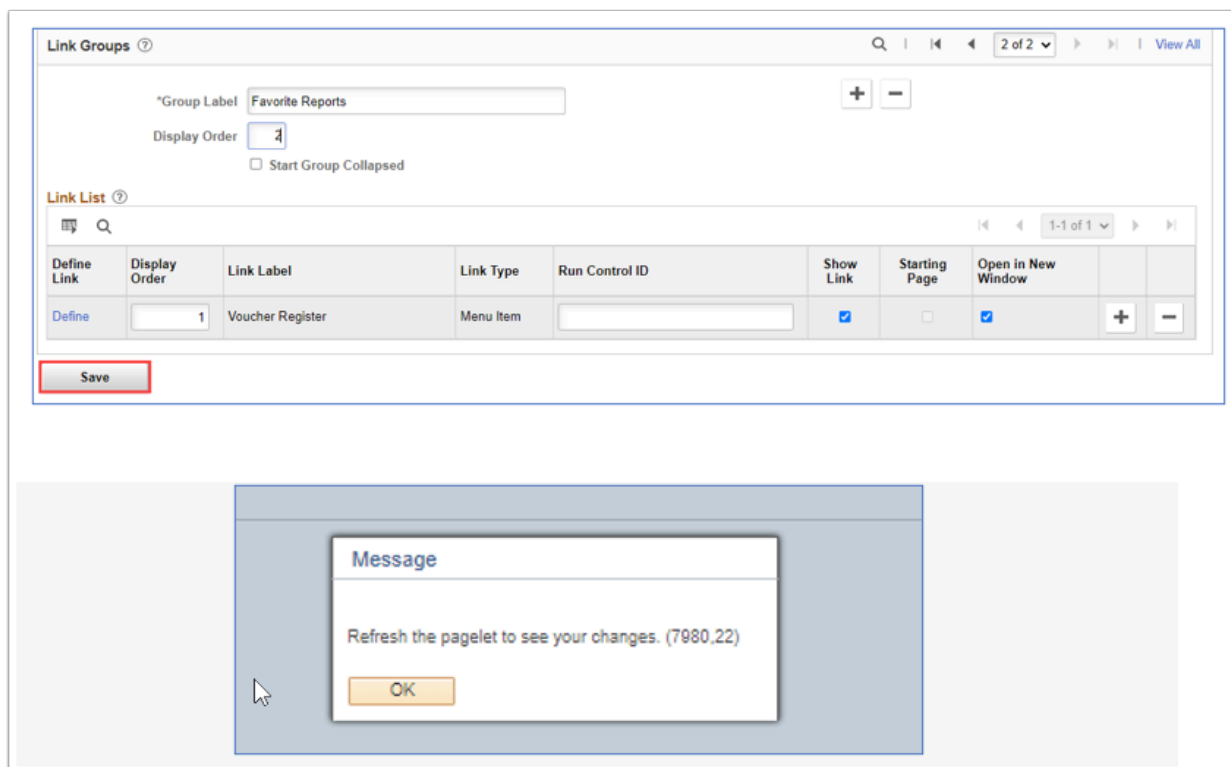
Click OK to return to the Define User Reports page. After the link is defined, the remaining link options can be configured:

- If there are multiple reports listed, the display order can be defined by inputting numbers in the order preferred.
- Run Control ID input the Run Control ID usually used to run the report.
- Check the Start Group Collapsed box (optional).
- Open in New Window check to open the report in a new tab.

6. **Save** the changes.

7. A message will display reminding the user to refresh the pagelet to see the changes.
8. Select **OK.**

9. Close out the window to return to the Security Admin WorkCenter.
10. Click on the Refresh icon in the pagelet section header to see the changes.

11. Process complete.