

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.

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

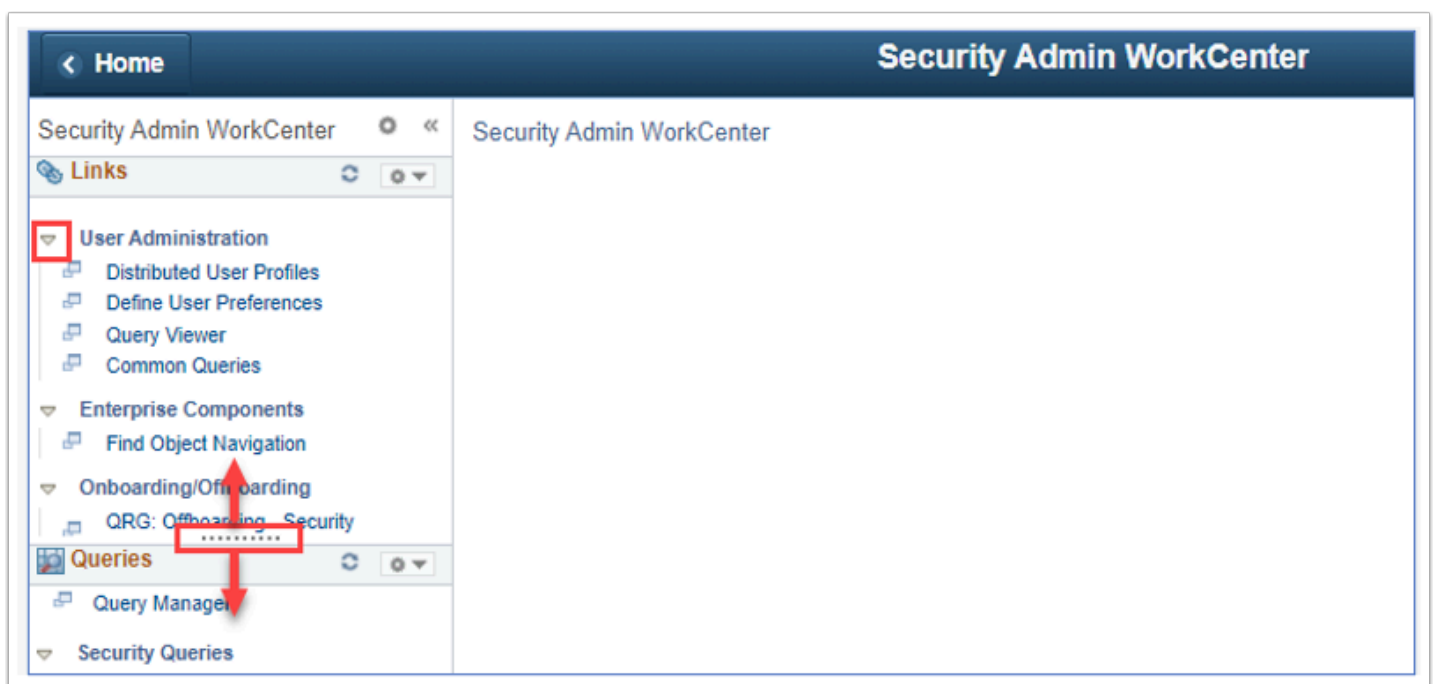
Using the Security Admin WorkCenter

Navigation: NavBar > Navigator > PeopleTools > Security > Security Admin WorkCenter

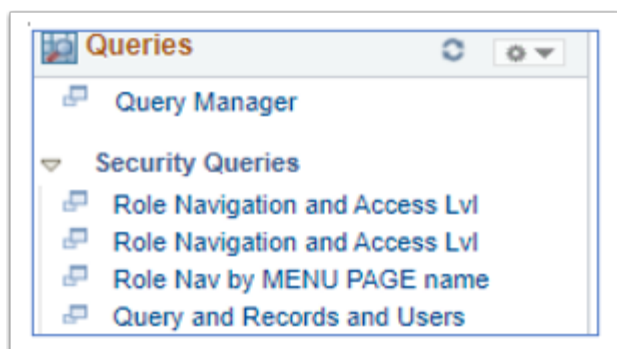
1. The **Security Admin WorkCenter** page displays. The pagelets menu displays on the left side of the page. Pagelets, or sections, of the WorkCenter menu, are broken into the categories Links, Queries, and Reports/Processes.



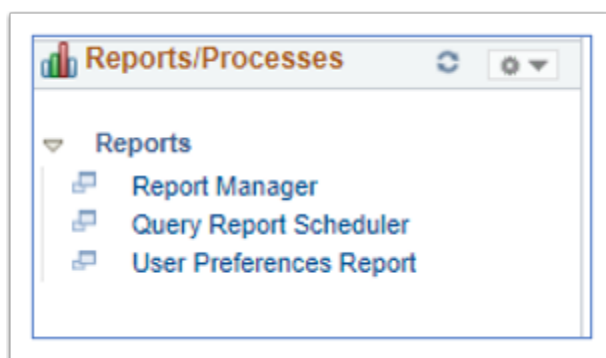
2. The **Links** section provides links to pages that are accessed frequently. The links that appear are determined during system setup. The primary purpose of this pagelet is to minimize the number of clicks to access components and external links. It includes links divided into collapsible sections.
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.

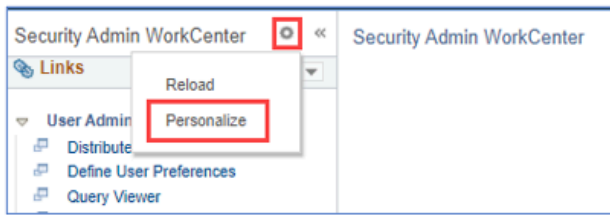


Personalizing the Security Admin WorkCenter

-  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.



User Personalization

Personalize Security Admin WorkCenter

Select from the available option(s) to personalize the display of each pagelet group in the Security Admin WorkCenter.

*Pagelet Group: Security WorkCenter

Pagelet Label	Selected	Initially Minimized	Display Order
Links	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1
Queries	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2
Reports/Processes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3

Reset to Defaults

Save Cancel

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 will reload with the selected options.

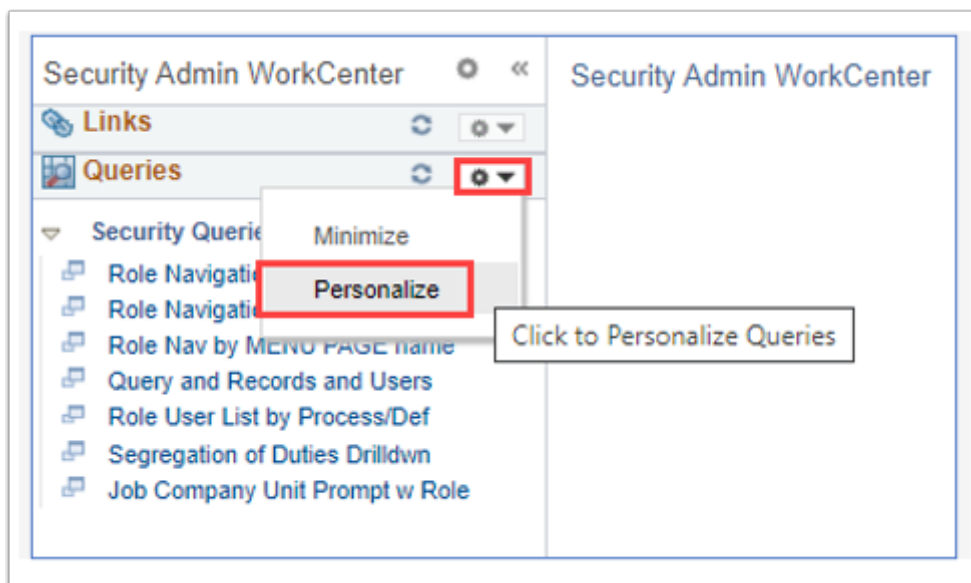
WorkCenter Pagelet Personalization

- i** 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

 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.

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.

Look Up Query Name

Search by: Query Name

begins with

Search

Cancel

Advanced Lookup

Search Results

Only the first 300 results can be displayed.

View 100

1-300 of 300

Query Name	Description
1099C_CUST_DATA	Input to 1099C Crystal

- **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.

Query Groups

*Group Label Favorite Queries

Display Order 2

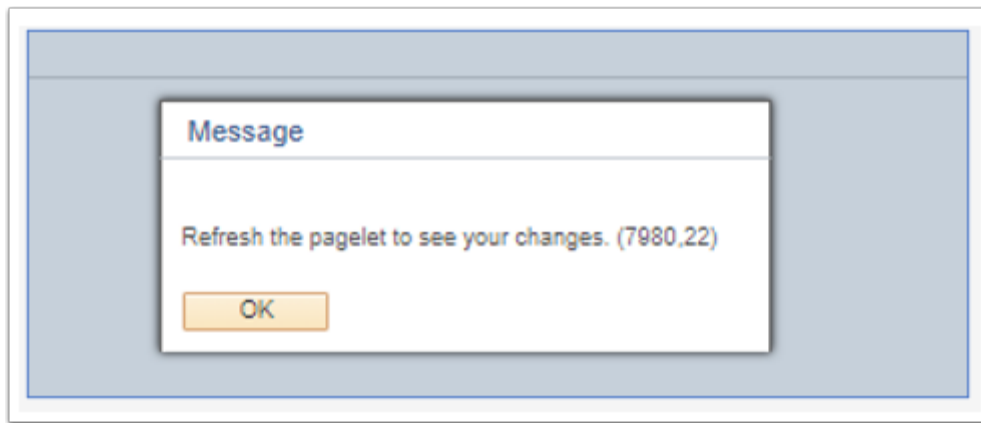
☐ Start Group Collapsed

Query Definition

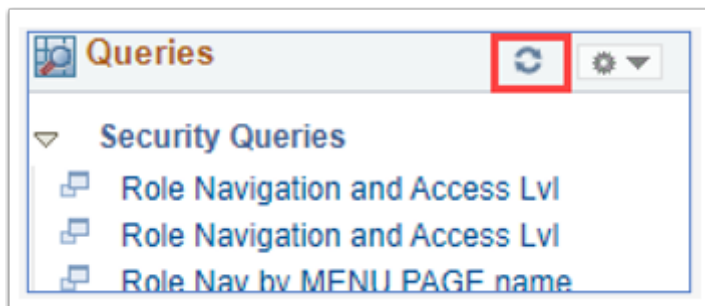
Display Order	Owner	*Type	Override Title/Description	Query Name	Description	Show Link	Starting Page
1	Public Owner	Query	<input type="checkbox"/>	QFS_AP_PAYMENT_DETAIL	AP Payment Detail	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save

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.

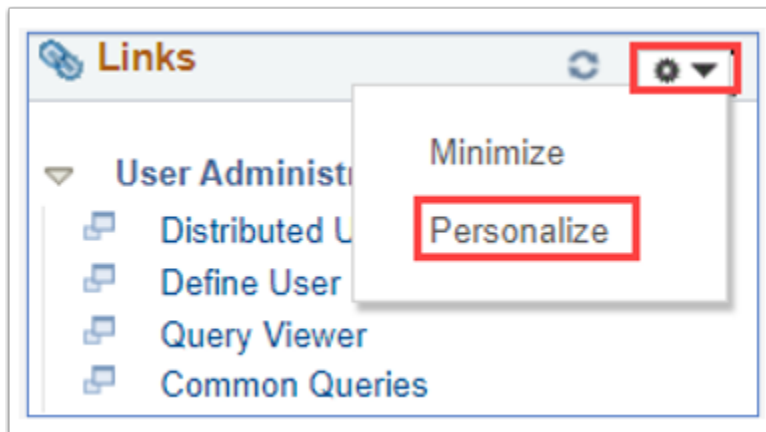


12. Section complete.

To Add Links

i 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.

Define User "Links" Links

Links Pagelet Personalization

Configuration ID: CTC_SECURITY_WC Security Admin WorkCenter
User ID: 10102

[Delete Personalization](#)

Link Groups ? 1 of 4 [View All](#)

*Group Label: +

Display Order:

☐ Start Group Collapsed

Link List ? 1-4 of 4

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window
Define	<input type="text" value="1"/>	Distributed User Profiles	Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

Define User "Links" Links

Links Pagelet Personalization

Configuration IDCTC_SECURITY_WC
Security Admin WorkCenter

User ID101C

Delete Personalization

Link Groups ?
2 of 5
View All

*Group Label
Display Order
☐ Start Group Collapsed

Link List ?
1-1 of 1

Define Link	Display Order	Link Label	Link Type	Show Link	Starting Page	Open in New Window		
Define			Menu Item	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Save

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

Define Link

*Link TypeMenu Item
Select Menu Item

Menu Item Name
☐ Override Label

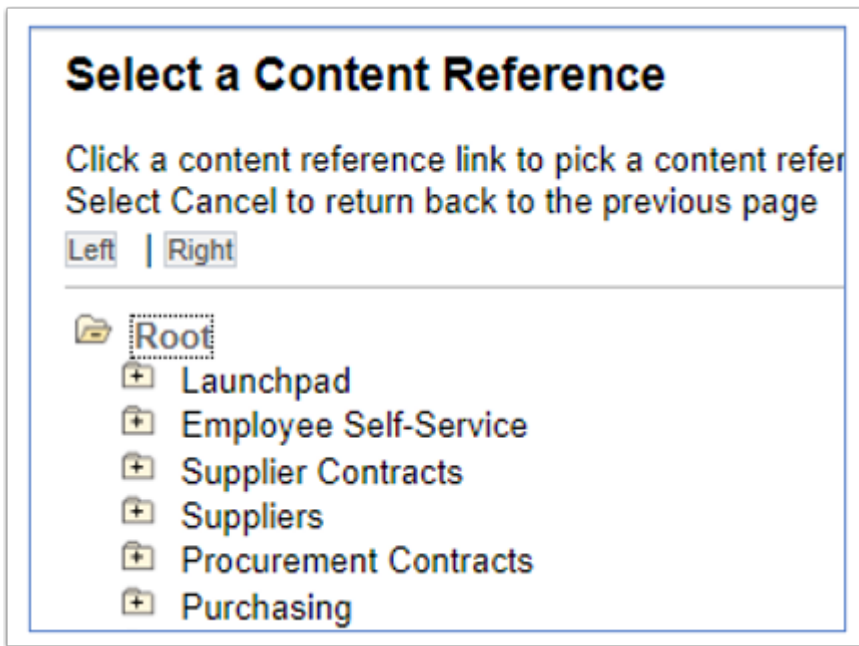
Label

OK

Cancel

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.

The 'Define Link' dialog box is shown with the following configuration:

- *Link Type:** A dropdown menu set to 'Menu Item' with a blue 'Select Menu Item' link to its right.
- Menu Item Name:** A text field containing 'PT_PVG_PSVIEWER'.
- Override Label:** An unchecked checkbox.
- Label:** A text field containing 'Pivot Grid Viewer'.
- Buttons:** 'OK' (green) and 'Cancel' (gray) buttons at the bottom left.

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.

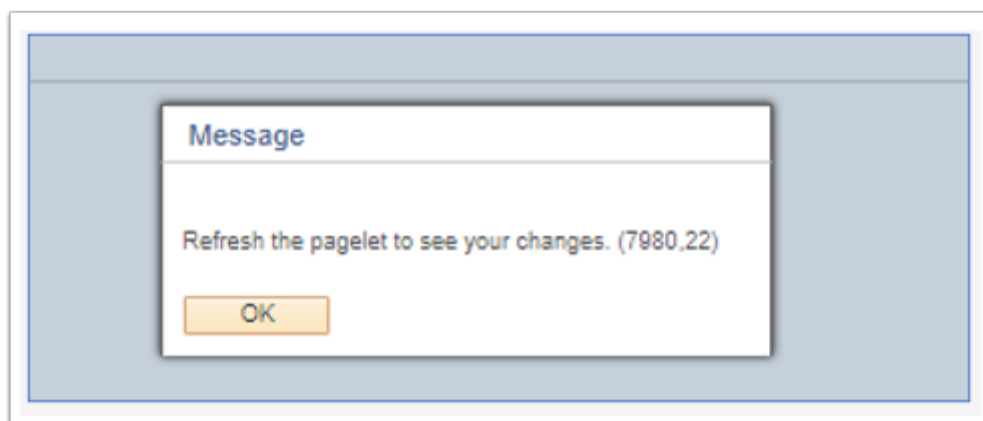
The 'Define Link' dialog box is shown with the following configuration:

- *Link Type:** A dropdown menu set to 'URL'.
- Warning:** A yellow highlighted box contains the text: 'Some URLs may not render properly. Check 'Open in New Window' in the previous page if that happens.'
- URLID:** A text field containing 'https://ctclinkreferencecenter.ctclink.us/'.
- Label:** A text field containing 'ctcLink Reference Center'.
- Buttons:** 'OK' (green) and 'Cancel' (gray) buttons at the bottom left.

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

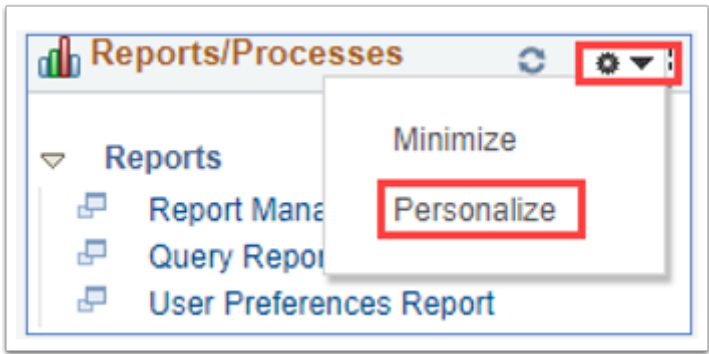
10. Click on the Refresh icon in the pagelet section header.

11. Section complete.

To Add Reports

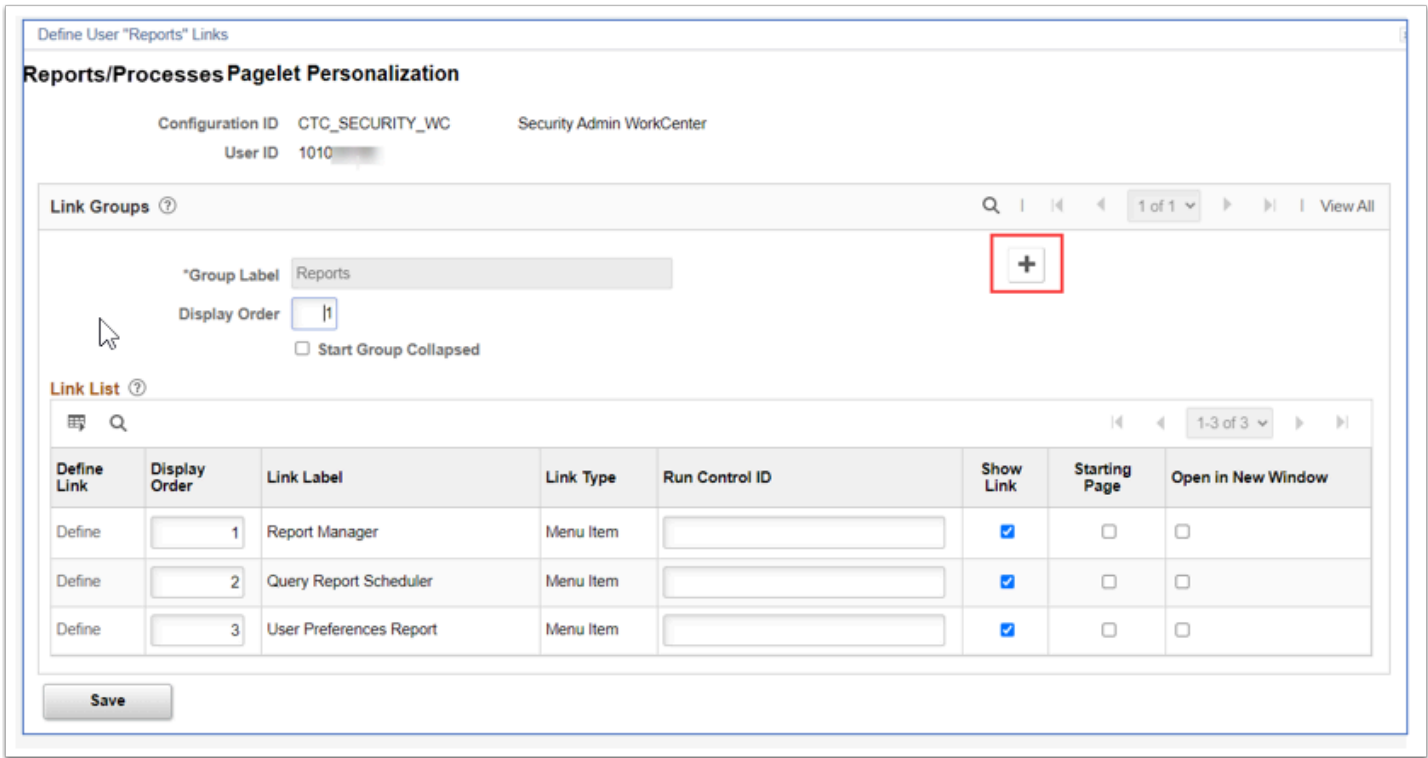
 In this example, a frequently used Report will be added to the WorkCenter's Reports pagelet.

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).

Define User "Reports" Links

Reports/Processes Pagelet Personalization

Configuration ID CTC_SECURITY_WC Security Admin WorkCenter
User ID 10102

Link Groups ?

*Group Label + -

Display Order

☐ Start Group Collapsed

Link List ?

1-1 of 1

Define Link	Display Order	Link Label	Link Type	Run Control ID	Show Link	Starting Page	Open in New Window		
Define	<input type="text"/>		Menu Item	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+ -	

[Save](#)

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

Define Link

*Link Type [Select Menu Item](#)

Menu Item Name

☐ Override Label

Label

[OK](#) [Cancel](#)

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.

Select a Content Reference

Click a content reference link to pick a content reference.
Select Cancel to return back to the previous page.

Left | Right

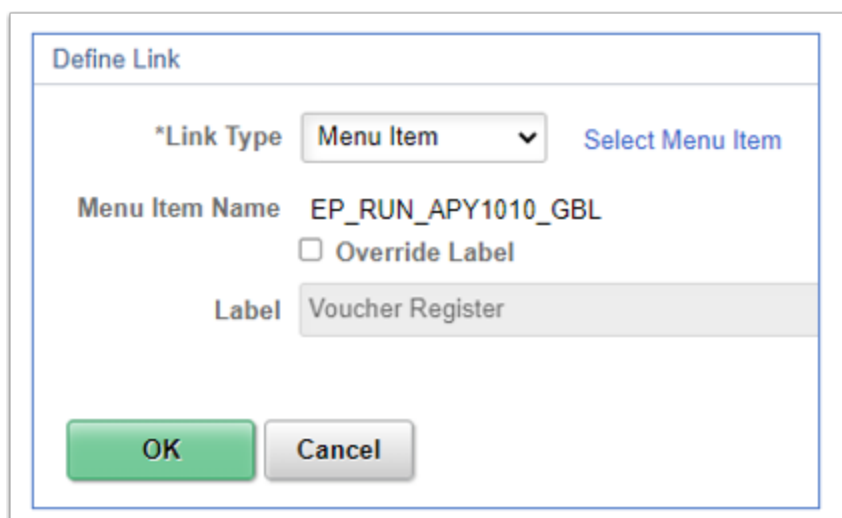
- Root
 - Launchpad
 - Employee Self-Service
 - Supplier Contracts
 - Suppliers
 - Procurement Contracts
 - Purchasing

In this example, the Voucher Register is selected. Click on the report name in blue.

- Accounts Payable
 - CTC Custom
 - Batch Processes
 - Review Accounts Payable Info
 - Reports
 - Vouchers
 - [Voucher Listing by Chartfield]
 - [Match Exceptions]
 - [Posted Voucher]
 - [Registered Voucher]
 - [Voucher Activity]
 - [Voucher Register]
 - [Credit Voucher]

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.



Define Link

*Link Type **Menu Item** [Select Menu Item](#)

Menu Item Name **EP_RUN_APY1010_GBL**

☐ Override Label

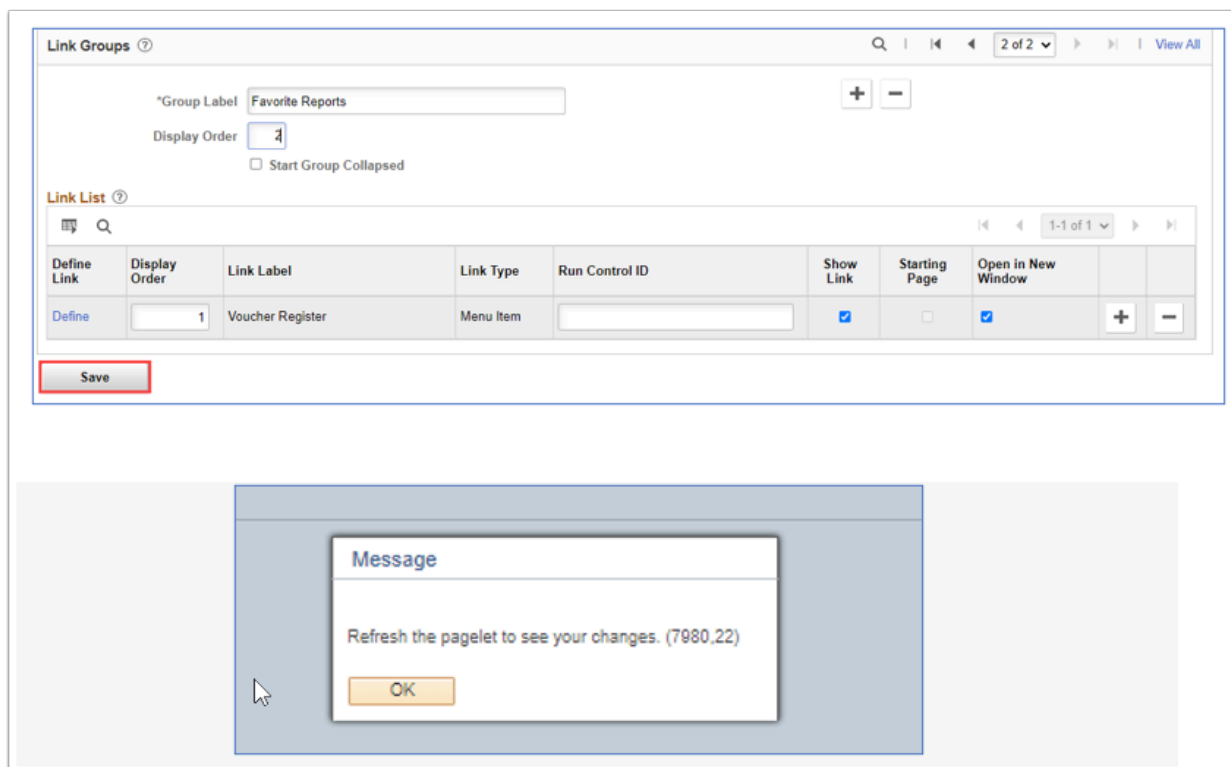
Label **Voucher Register**

OK **Cancel**

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.



Link Groups ⓘ

*Group Label **Favorite Reports** **+** **-**

Display Order **2**

☐ Start Group Collapsed

Link List ⓘ

Define Link	Display Order	Link Label	Link Type	Run Control ID	Show Link	Starting Page	Open in New Window		
Define	1	Voucher Register	Menu Item		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

Save

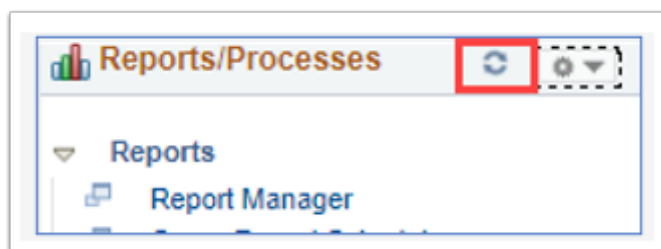
Message

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

OK

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.