Work Tray

Work Tray

Overview

The Work Tray is the starting point for all users of the PB System. Its purpose is to allow users to manage the work items to which they have access in the system. This includes viewing, editing, and searching for work items in the PB System. Additionally, users will receive system messages in their Work Tray. The following topics are covered in the Work Tray documentation:

- Claiming a Work Item
- Claimed Work Items
- Applying Filters
- Searching for a Work Item
- My Messages

The following screenshot shows the fields that are always visible in the Work Tray. A description of each field follows.

- **Document Type** – A filter that can be applied to filter work items based upon their document type.
- **Status** – A filter that can be applied to filter work items based upon their status.
- **Agency** – A filter that can be applied to filter work items based upon their agency.
- **Apply** – A button that applies the selected filters.
- **Clear** – A button that clears all filters.
- **Claimed Work Items** – A tab in the Work Tray that allows users to manage their claimed work items.
- **Available to be Claimed** – A tab in the Work Tray that allows users to manage their work items that are available to be claimed.
- **Search All Work Items** – A tab in the Work Tray that allows users to search all existing work items.

- **My Messages** – A tab in the Work Tray that allows users to manage their system messages.

Claiming a Work Item

1. Click the **Available to be Claimed** tab.

   Available to be Claimed

2. Clicking the *i* button next to a work item will display details about the work item.

Work Item Name: BudExAdj: 236 : print screen as DPBA 9/7 - 1 Time Created: 9/7/2010 11:20:42 AM		
Step	**Status**	**Details**
Enter Adjustment	Complete	Details
DPB Approve	Complete	Details
DPB Approve	Complete	Details
DPB Approve	Queued	Details

3. Find the work item that you want to claim and click the **Claim** button. You will be taken to the first tab on the selected work item.

   Claim

Claimed Work Items

1. Click the **Claimed Work Items** tab. Claimed work items are work items that you have already claimed. They are unavailable to other system users until they are submitted.

   Claimed Work Items

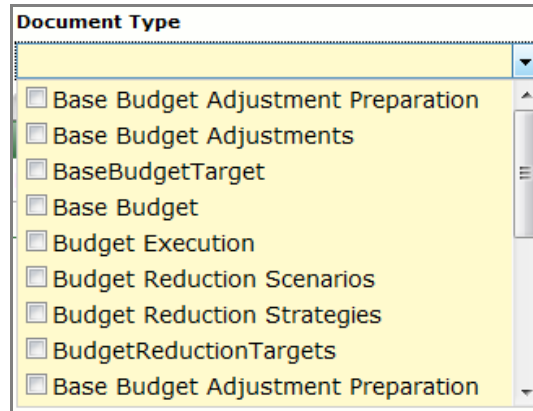2. Clicking the *i* button next to a work item will display details about the work item.

Work Item Name: BudExAdj: 236 : print screen as DPBA 9/7 - 1 Time Created: 9/7/2010 11:20:42 AM		
Step	**Status**	**Details**
Enter Adjustment	Complete	Details
DPB Approve	Complete	Details
DPB Approve	Complete	Details
DPB Approve	Queued	Details

3. Find the work item that you want to work with and click the **Open** button. You will be taken to the first tab on the selected work item and information will be displayed based on the last time the work item was saved.
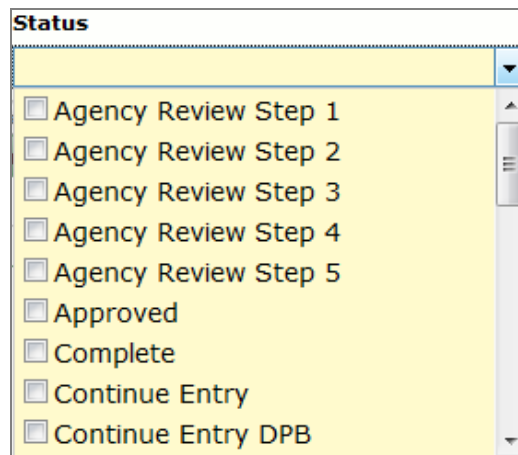
   Open

Applying Filters

4. Select the tab on the Work Tray to which you would like to apply a filter.

5. Click the **Document Type** dropdown and check all work item types that you want to display. (More than one item may be selected.)

Document Type

- ☐ Base Budget Adjustment Preparation
- ☐ Base Budget Adjustments
- ☐ BaseBudgetTarget
- ☐ Base Budget
- ☐ Budget Execution
- ☐ Budget Reduction Scenarios
- ☐ Budget Reduction Strategies
- ☐ BudgetReductionTargets
- ☐ Base Budget Adjustment Preparation

6. Click the **Status** dropdown and select the status types that you want to display. (More than one status may be selected.)

Status

- ☐ Agency Review Step 1
- ☐ Agency Review Step 2
- ☐ Agency Review Step 3
- ☐ Agency Review Step 4
- ☐ Agency Review Step 5
- ☐ Approved
- ☐ Complete
- ☐ Continue Entry
- ☐ Continue Entry DPB

7. Click the **Agency** field and a popup list will appear allowing you to select the agency filter. The work items for only the selected agency will be displayed. (Only one agency at a time can be selected.)
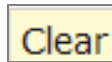
Agency

8. Click the **Apply** button to apply the filter. "Filter Active" will display next to the Clear button. The **Apply** button must be clicked each time the filter is changed. A filter will remain active for all tabs on the Work Tray (Claimed Work Items, Available to be Claimed and Search All Work Items) until a user changes it or clears it. Filters remain active even when logging in and out of the PB System.

Apply

9. Click the **Clear** button to clear the filter. The Filter Active text will no longer be displayed. All items available to the Work Tray will then be displayed.

Clear

Searching for a Work Item

1. Click on the **Search All Work Items** tab. Several search criteria fields will be displayed, as set out in the following steps. Apply one or more of these search criteria. Not all items have to be filled in.

Search All Work Items

2. Enter a keyword in the **Search Text** field, or

3. Select a status from the **Status** dropdown box, or

4. Select either Search Latest Documents Only or Search Latest and Historic Documents from the **History Filter,** or

5. Enter a date range in the **Date Last Changed** calendar fields for Starting Date and Finishing Date.

6. Click the **Search** button to display only those work items that fit the selected criteria. The Score column displays the relevance of the work item based upon the search criteria and the Action column displays the action available for each work item based upon your user permissions.

Work Item Name	Step	State	Date Last Changed	Score	_i_	Action
BudExAdj: 236 : print screen as DPBA 9/7 - 1	DPB Approve	Complete	9/7/2010 11:54:39 AM	93%	_i_	View
BudExAdj: 236 : print screen as DPBA 9/7 - 1	Enter Adjustment	Complete	9/7/2010 11:21:33 AM	93%	_i_	View

My Messages

1. Go to **Notification Preferences** and follow the Notification Preferences documentation in order to change your system notification preferences.

2. Click on the **My Messages** tab. Each message will display a message title, who or what it is from, when it was received and the status.

My Messages

3. To view a message, click on the **View** button. The message will open for viewing.

Message	From	Received	Status	Action
Capital Budget Request Ready for Review	Capital Budget Request	9/7/2010 12:56:35 PM	Unread	View

4. Use the **Next** or **Previous** buttons to cycle through messages and the **Delete** button to delete a message.

Previous   Next

Delete

5. Clicking **Return to Message List** will return the user to the My Messages inbox.

Return to Message List