



WORKSPACE

POWERED BY  DUG

**DYNAMICS CON
LIVE**

MAY 2024

PERSONALIZATION

Workspace Personalization

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THE CITY OF
COLUMBUS





August 27 - 28, 2024
OHIO REGIONAL



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Workspace Personalization

- What are workspaces
- Types of Workspaces
- Creating/Personalizing a Workspace
- Sharing a Custom/Personalized Workspace





What is a Workspace?

**Workspaces are
User Centric Dashboards
within the D365 environment**

What is a Workspace ... Components

- Workspace Components/Sections
 - Tiles
 - *** Note: Tile counts are legal entity specific ***
 - Tabbed List
 - Charts
 - Links



Workspace Varieties

- Pre-configured
 - MS or System Administration and tied to a Role(s)
- User Created
- Hybrid





City of Columbus

Search people ...

< May 2024 >

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Work items assigned to me ^

Work items will be displayed here after they are assigned to you.

To-do list

You're all caught up on your tasks.

JSC Common Tasks <hr/> 'Checked' Status - Statement 0 Enabled-Columbus.gov 559	Fixed asset management	Data management	Purchase Request for quotation	Vendor information
Cashiering Financials <hr/> Pending ledger allocations 0	Bank management	Feature management	Retail and Commerce IT	Vendor invoice automation
Free text invoicing <hr/> Unposted free text invoices 1	Catalog management	Globalization studio	Store financials	Vendor invoice entry
Budget planning	Category and product management	Purchase order confirmations	Store management	Vendor payments
	Channel deployment	Purchase order preparation	System administration	Vendor payments
	Confirmed purchase orders with changes	Purchase order receipt and follow-up	Vendor bidding	

Pre-Configured Workspace



System administration

Summary

- 66**
Failed batch jobs
- Security configuration
- System settings
- Lifecycle Services
- Data Management IT
- 0**
High-volume notifications

Monitor batch jobs

Failed batch jobs

Running batch jobs

Waiting batch jobs

Withheld batch jobs

Filter

Job description	Scheduled start date/time	Created by
Create target data-APVI S...	5/14/2024 1:06:12 PM	LogicApps
Process one-time vendors...	5/14/2024 1:06:16 PM	LogicApps
Create target data-ALE Im...	5/14/2024 1:06:22 PM	LogicApps
Create advanced ledger e...	5/14/2024 1:06:23 PM	LogicApps
Process automation back...	5/14/2024 1:06:26 PM	Admin
Batch job for activity Recu...	5/14/2024 1:06:27 PM	LogicApps
Workflow message proce...	5/14/2024 1:06:31 PM	Admin
Workflow line item notific...	5/14/2024 1:06:31 PM	Admin
Create target data-APVI E...	5/14/2024 1:06:31 PM	LogicApps
Batch job for activity Recu...	5/14/2024 1:06:33 PM	LogicApps
Batch transfer for subledg...	5/14/2024 1:06:38 PM	Admin
Batch job for activity Recu...	5/14/2024 1:06:48 PM	LogicApps
Dual write system cleanu...	5/14/2024 1:06:50 PM	Admin
Updates system notificati...	5/14/2024 1:06:50 PM	Admin
Batch job for activity Recu...	5/14/2024 1:06:51 PM	LogicApps
Deletes non-active and or...	5/14/2024 1:06:51 PM	Admin
Vendor collaboration - inv...	5/14/2024 1:06:53 PM	Admin
Batch job for activity Recu...	5/14/2024 1:06:53 PM	LogicApps

Related links

LIFECYCLE SERVICES

[Help settings](#)

ORGANIZATIONS

[Internal organizations](#)

[Organization hierarchies](#)

DATA

[Data management](#)

TRACES

[Create new trace](#)



Options 🔍

Custom to Role Workspace

Cashiering Financials

Summary

893 All calculated statements	3030 All posted statements	830 CUBS Exported	6 Pending CUBS Exported
273 Validated transactions	0 Non validated Transactions		
840 Calculated open statements	0 Erroneous statements		
2 Approved statements	0 Rejected statements		
3030 Posted statements	0 Pending ledger allocations		

Details

- Pending transactions
- Validated transactions
- Closed shifts**
- Calculated statements
- Approved statements
- Posted statements

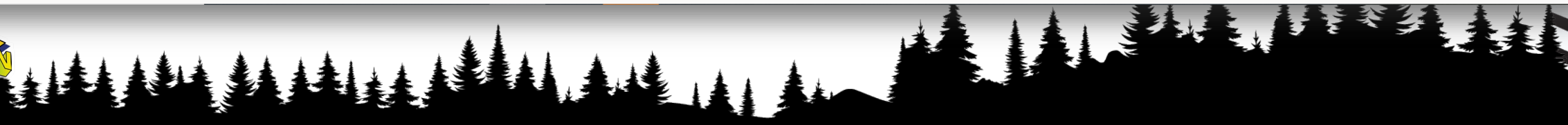
Filter All shifts [Z-Report](#)

Shift ID	Store number	Register number	Closed date	Closed time
635	DSS	DSS001	5/14/2024	12:48:35 PM
635	CPH	CPH002	5/13/2024	4:30:27 PM
456	DPU	DPU004	5/13/2024	3:47:07 PM
402	DPU	DPU006	5/13/2024	3:46:41 PM
270	DPU	DPU007	5/13/2024	3:39:56 PM
257	DPU	DPU002	5/13/2024	3:36:50 PM
528	DSS	DSS003	5/13/2024	3:32:04 PM
452	DSS	DSS005	5/13/2024	3:31:03 PM
634	DSS	DSS001	5/13/2024	12:43:46 PM
348	DPS	DPS002	5/13/2024	11:33:04 AM
268	CFD	CFD001	5/13/2024	9:02:21 AM
634	CPH	CPH002	5/10/2024	4:30:03 PM
789	CPH	CPH001	5/10/2024	4:14:47 PM
401	DPU	DPU006	5/10/2024	4:07:44 PM
222	CPH	CPH004	5/10/2024	4:03:31 PM
482	DSS	DSS002	5/10/2024	3:53:44 PM
633	DSS	DSS001	5/10/2024	1:34:52 PM

[See more](#)

Links

- Service
 - [Released products by category](#)
- Sales Reports
 - [Store transactions](#)
 - [Retail infocode transactions](#)
 - [Retail payment transactions](#)
 - [Retail sales transactions](#)
 - [Retail free text invoice](#)
 - [Store sales](#)
- Financial Reports
 - [Customer aging report](#)
 - [Trial balance](#)
 - [Customer account statement](#)
- Fire Reports
 - [Retail fire infocode transaction](#)
 - [Retail fire payment transactions](#)
 - [Retail fire sales transactions](#)



City of Columbus

Search people ...

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JSC Common Tasks

'Checked' Status - Statement **0**
Enabled-Columbus.gov **559**

User Workspace

The screenshot shows the Dynamics 365 Finance and Operations user workspace for 'JSC Common Tasks'. The interface includes a top navigation bar with 'Finance and Operations', a search bar with 'Options', and a left-hand navigation pane with icons for home, star, clock, and list. The main content area features a 'Summary' section with two large teal cards: 'Enabled-Columbus.gov' with a value of 559 and ''Checked' Status - Statement' with a value of 0. Below this is a 'Links' section with three columns of navigation options.

LINKS	USER SETUP & MAINTENANCE	TROUBLESHOOTING
CASHIERING	JSC - User View	Batch Jobs
Retail User Set-up (Matrix)	Workers	Email History
Distribution Schedules	Positions	Batch Email Send Status
Download Sessions (Distribution J...)	Department Designees/Signatories	Stopped Workflow
Channel Profile (POS url)	User Groups - All	
All Stores		



Sharing A Customized Workspace

- System Administration > Setup > Personalization > Personal Views
- Copy to User
- Select Users or Roles



Standard view ▾

Personalization

Published views

Unpublished views

Personal views

User settings

System settings

Personal views

These views have been created by users in the system. You can publish a personal view to the organization or copy one or more of these views to other users.

🔍 Filter

📄 Publish

↕ Export

🗑 Delete

📄 Copy to users

○ Page	Page display	View name	Legal entity	Owner	🔍 Technical name
JSC Common Tasks		Standard view		Jody S Cronk	User_WSE0123EBC917D4...
Users		JSC - User View		Jody S Cronk	SysUserManagement
Position		Positions-No Forecast/Per...		Jody S Cronk	HcmPosition
User groups		Department Designees/Si...		Jody S Cronk	SysUserGroupInfo
Batch email sending status		Batch Email Send Status		Jody S Cronk	SysOutgoingEmailTable
Statements		Checked Status Statement		Jody S Cronk	RetailEodTrickleFeedState...
Free text invoice		Unposted FTI		Jody S Cronk	CustFreeInvoice
Released product details		W/Allocation Rule		Jody S Cronk	EcoResProductDetailsExt...
Free text invoice		FTI wuth Notes		Jody S Cronk	CustFreeInvoice
Free text invoice		FTI with Notes		Jody S Cronk	CustFreeInvoice
Vendors		My Test View		Jody S Cronk	VendTable
Vendors		Active Vendors		Jody S Cronk	VendTable
Open vendor invoices		Open Vendor Invoices		Jody S Cronk	VendOpenInvoicesListPage
Pending vendor invoices		Pending Invoices		Jody S Cronk	VendInvoiceInfoListPage
✓ Demo Workspace		Standard view		Jody S Cronk	User_WS60E9B90A8CCA4...



Copy to users

Select a set of users to share the selected views with

Filter by role

All users

<input type="radio"/>	User ID	Name	Email
<input type="radio"/>	001truenorth@g...	Jamarr Hill	001truenorth@gmail.com
<input type="radio"/>	01kmdezpm5esvx...	Austin Yochus	austiny@dronenerds.com
<input type="radio"/>	01mstyra@gmail....	Tyra Monique Glo...	01mstyra@gmail.com
<input type="radio"/>	095bu50mjzmt1...	Julia Strange	julia.strange@henryschei...
<input type="radio"/>	0degreeswindowc...	Rahman Clay	0degreeswindowcleaning...
<input type="radio"/>	0fvr1rrajs21pzsne...	Daniel Newman	dan@maplight.org
<input type="radio"/>	0lyxa8q66wxyxpe...	Samantha Kemp	samantha.kemp@cardno....
<input type="radio"/>	0m2o83htzwrxd5i...	vicky WOLFINGER	vwolfinger@mcmahontru...
<input type="radio"/>	0nxgdhob@duck....	TestFirst10312023...	0nxgdhob@duck.com

Copy to users

Select a set of users to share the selected views with

Filter by role

ZZ_AP_Inquiry

<input checked="" type="checkbox"/>	User ID	Name	Email
<input checked="" type="checkbox"/>	AAKing	Aaron King	AAKing@columbus.gov
<input checked="" type="checkbox"/>	ajnichols	ANNA NICHOLS	ajnichols@columbus.gov
<input checked="" type="checkbox"/>	APMcEwen	Angela McEwen	APMcEwen@columbuspo...
<input checked="" type="checkbox"/>	ARlulianelli	Anthony Iulianelli	ARlulianelli@columbus.gov
<input checked="" type="checkbox"/>	asbush	Anthony Bush	asbush@columbus.gov
<input checked="" type="checkbox"/>	BABayliff	Brad Bayliff	BABayliff@columbus.gov
<input checked="" type="checkbox"/>	bfinderson	Belinda F Anderson	bfinderson@columbus.gov
<input checked="" type="checkbox"/>	BJWhite	Brandy J White	BJWhite@columbus.gov
<input checked="" type="checkbox"/>	BMCharlton	Barbara Charlton	BMCharlton@columbus.g



Create a Custom Workspace Demo

The screenshot displays a custom workspace in Dynamics 365 Finance and Operations. At the top, a video call window shows a participant. Below it, the browser address bar shows the URL: `colstraining-2.sandbox.operations.dynamics.com/?cmp=COLS&mi=DefaultDashboard`. The workspace header features a cityscape image and the text "City of Columbus".

The main content area is organized into several sections:

- Search people ...**: A search bar for user profiles.
- Calendar**: A monthly view for May 2024, with the 14th highlighted.
- Work items assigned to me**: A section for tasks assigned to the user.
- To-do list**: A section for tasks the user is responsible for.
- Dashboard Grid**: A collection of 20 tiles for various business processes, including:
 - JSC Common Tasks: 'Checked' Status - Statement (0), Enabled-Columbus.gov (841)
 - Cashiering Financials: Pending ledger allocations (0)
 - Free text invoicing: Unposted free text invoices (7)
 - Budget planning
 - Fixed asset management
 - Bank management
 - Catalog management
 - Category and product management
 - Channel deployment
 - Confirmed purchase orders with changes
 - Data management
 - Feature management
 - Globalization studio
 - Purchase order confirmations
 - Purchase order preparation
 - Purchase order receipt and follow-up
 - Purchase Request for quotation
 - Retail and Commerce IT
 - Store financials
 - Store management
 - Purchase order preparation
 - Purchase order receipt and follow-up
 - Vendor information
 - Vendor invoice automation
 - Vendor invoice entry
 - Vendor payments
 - Vendor payments
 - Vendor bidding



References

- [Loganconsulting.com/blog/streamline-your-business-processes-with-personalized-workspaces-in-microsoft-dynamics-365](https://loganconsulting.com/blog/streamline-your-business-processes-with-personalized-workspaces-in-microsoft-dynamics-365)
- [Learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/build-workspaces](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/user-interface/build-workspaces)
- [Cloudfronts.com/blog/d365-enterprise/d365-finance-operations/workspace-personalization](https://cloudfronts.com/blog/d365-enterprise/d365-finance-operations/workspace-personalization)

