Organizing "My Workspace" in Jenzabar

Below are tips for organizing the "My Links" and "My Reports" sections of the "My Workspace" feature of Jenzabar EX...

Dividers in My Workspace

In the screenshot below, links have been added to "My Links", sorted appropriately, and descriptive text has been added to divide the groups. The dividers are simply additional links that are not directly linked to anything.

Use any kind of link to create the preferred description. Text files can be used or an EX window for a simpler setup. For example, make a link to the "Name Entity" window (or any window often used) and instead of leaving the name as "Name Entity", name it "------ DAILY TASKS ------". This may assist in grouping together daily, weekly, monthly tasks, etc.

Note that the following instructions can be used to add any number of links to "My Workspace" in EX.
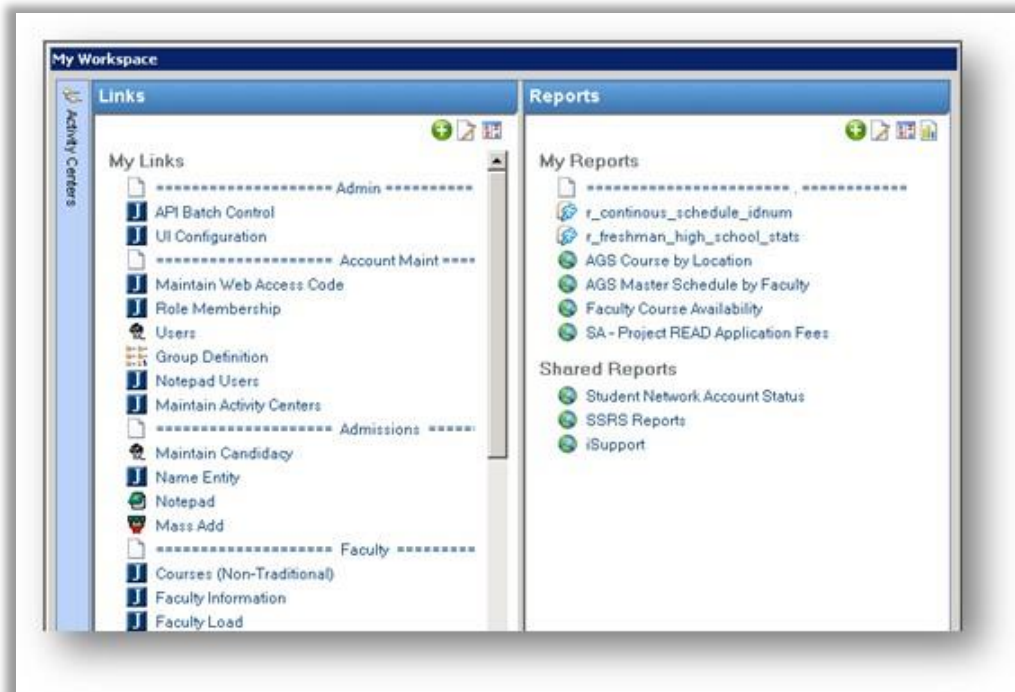
Create a Divider for your Links

Here's how to add a divider to "My Links", using the "Name Entity" window as an example. Use the following example to also organize the "My Reports" section.

1. Select the green - **+** - icon to add a new link.

2. Leave -**Type of Link**- set to 'EX Window'.

3. Select the -**EX Window**- drop-down list. Scroll down and select -**CM Name Entity**-.
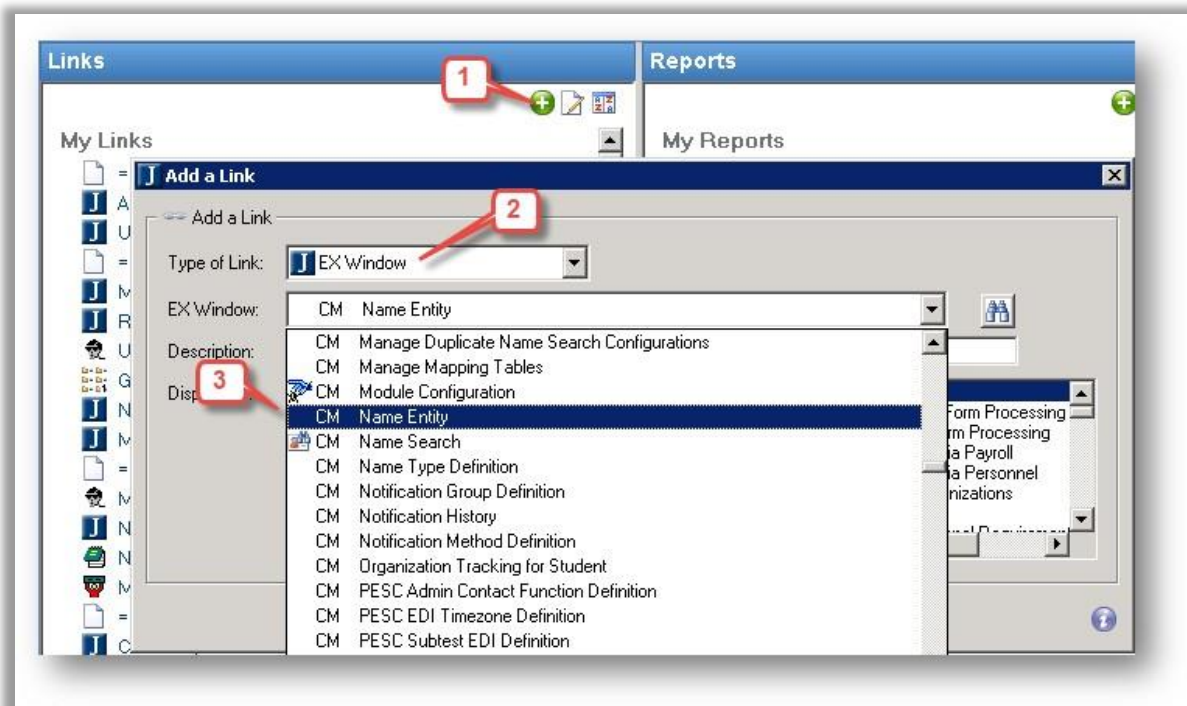
4. Change the -**Description**- from "Name Entity" to the preferred description. Some hyphens or equal signs make good dividers. There is a limit to how many characters can be entered.

5. Leave the -**Display For**- set to 'Me', and the -**Associate with**- set to 'Home Tab'.

6. Select -**OK**-.
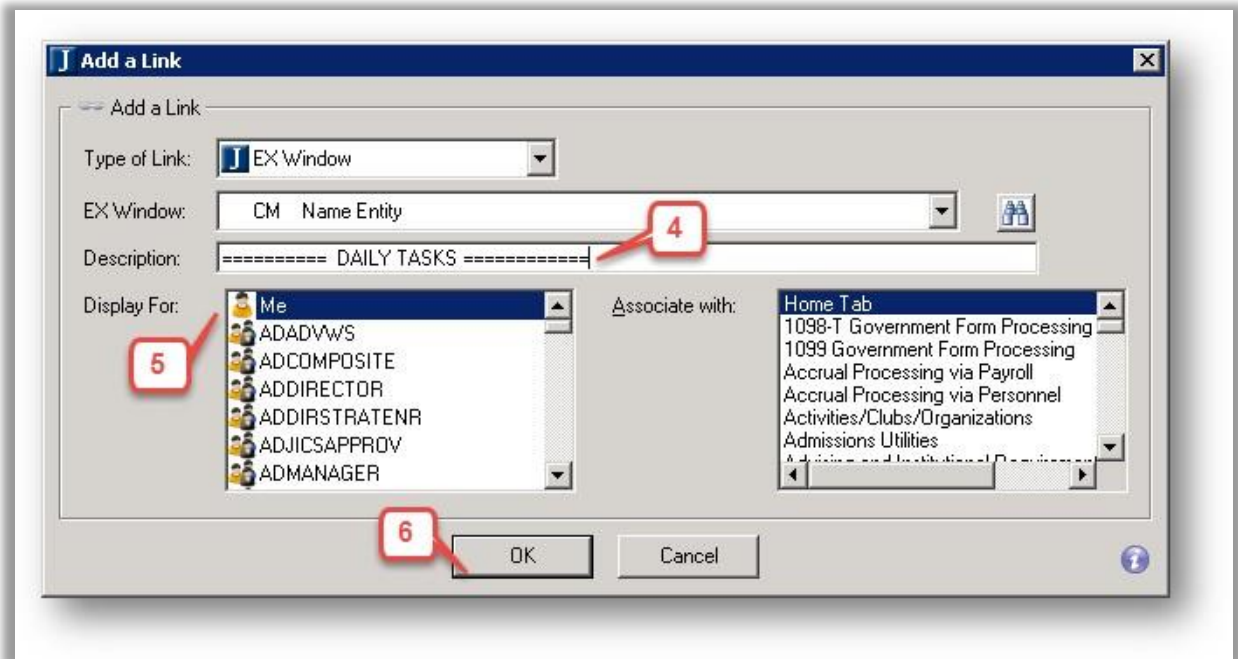
The new link will appear at the bottom of the "My Links" section. To move it into the appropriate place, complete the following:

7. Select the -**Order Links**- icon at the top of the "My Links" section.

8. Scroll down and select the new link.

9. Select the green "Up" and "Down" arrows to move the new link into place. Repeat this with all links to move them into a desired order.

10. Click -**OK**- to save the order of your links.