

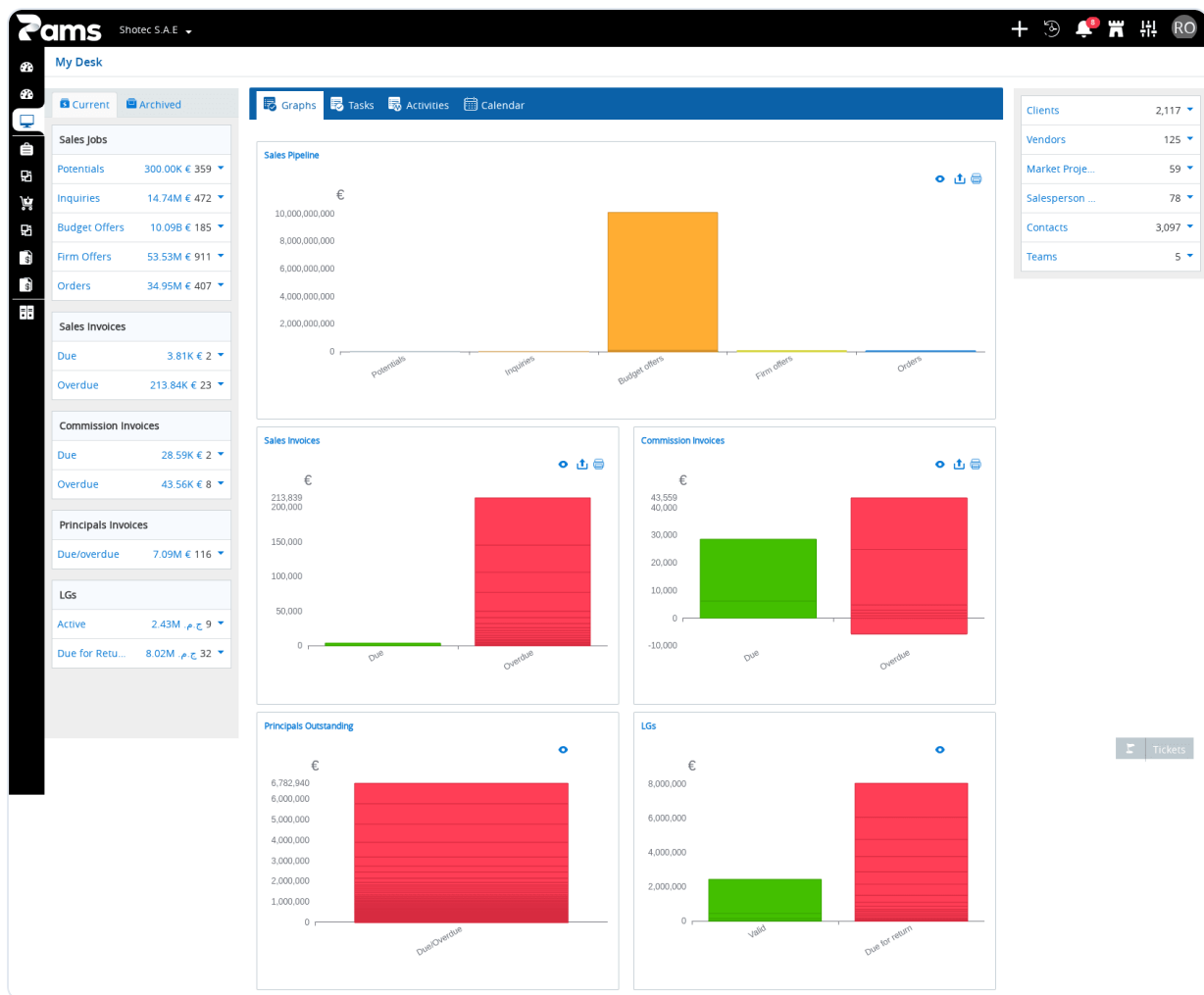
Personalizing your workspace

September 10, 2026

Personalizing your workspace

Use the available work surface to keep the view that matters to you in focus. Use the card-and-chart surface to find or add the cards and charts arranged for your role.

If you need to...	Go to
Choose a work view, list group, or workspace scope	Set your work view
Find or add a card or chart	Manage widgets
Understand why a tab or control is unavailable	Handle workspace availability branches
Work with tasks from the work surface	Manage workspace tasks
Record a visit, meeting, or call	Record workspace activities
Read cards and charts	Cards and charts
Choose a widget by its title	Widget catalog



Before you start

Prerequisites

- Know whether you are working in the work surface or the card-and-chart surface.
- Have the subscription that provides the work tabs you need.
- Have tabs available for your role when you want to manage widgets.
- If you need to change widgets, use the card-and-chart surface in edit mode.

The work surface can show a standard or principal-user heading. Tasks, Activities, and Calendar depend on the applicable subscription and are disabled for principal users. Widget-editing controls appear only in edit mode. The columns in several workspace lists depend on your saved layout, so use the headers that appear in your lists.

Open the workspace

Open the surface that matches the change you want to make.

Steps

1. Open the work view from the application menu.
2. Open the card-and-chart view from the application menu.

Result: The selected workspace surface is open.

Recognize the workspace surfaces

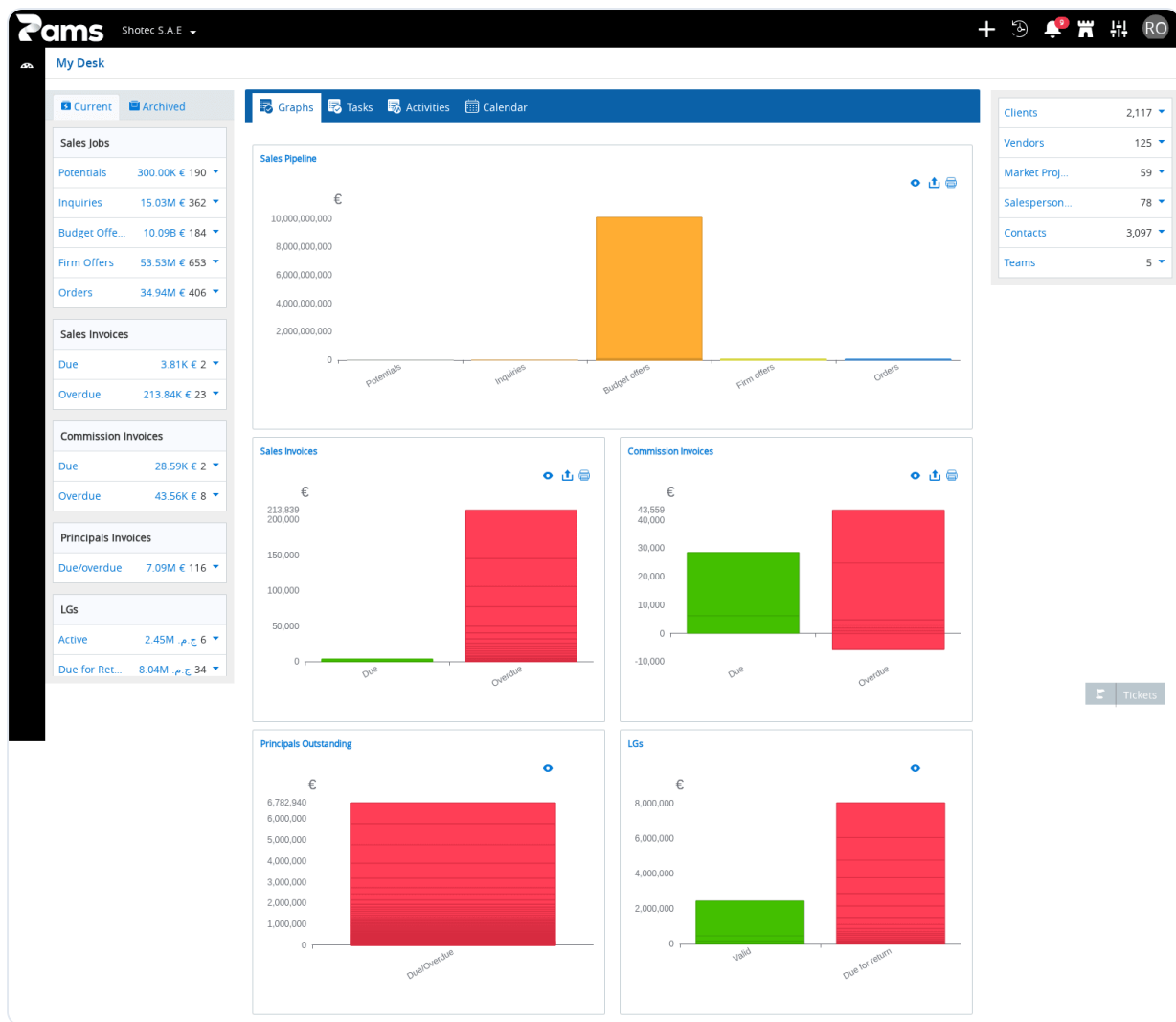
The work surface is for reviewing grouped work, tasks, activities, graphs, and calendar information.

The card-and-chart surface is a set of role-based tabs that displays the measures chosen for your work.

Work view

The work view uses one workspace context across its views. Choose from the scope values rendered for your workspace. Its list groups and work tabs are the values rendered for your workspace.

The work surface includes its rendered list groups, work tabs, and workspace readouts.



Card-and-chart view

The tabs divide the information into separate views. **Search for widget** finds a card or chart already on the active tab. The widget picker uses **Select all**, a keyword search, selected rows, and **OK**.

Use the controls that appear on your screen.

Set your work view

Use the work view when you want one work context across lists, graphs, tasks, activities, and calendar views.

Prerequisites

- Open the work view.

- If you use Tasks, Activities, or Calendar, confirm that the tab is available to you.

Steps

1. Select **Filter**.
2. Choose a scope value rendered for your workspace.
3. Select the view or list group that matches your work.

If you need to...	Select the value shown in the Filter column
Review grouped work	the list view
Review current work	the current list group
Review archived work	the archived list group
Review graphs	the graphs view
Review tasks	the tasks view
Review activities	the activities view
Review scheduled work	the calendar view

Use the new-activity menu when you need to start a related activity:

If you need to...	Select
Record a visit	Visit
Record a meeting	Meeting
Record a call	Call

Result: The work view shows the selected scope, work tab, or list group. The selected tab and list group remain stored for the workspace.

Manage widgets

Use the card-and-chart surface when you need to find a card or chart on the active tab or add one that is available to your role.

Prerequisites

- Open the card-and-chart surface.

- Use edit mode for widget changes.

Steps

1. Select **Search for widget** to find a card or chart already on the active tab.
2. Select **Widget** to open the widget picker when editing is available.
3. Select a widget row to include it in the selection.
4. Complete the widget change.

Action	Select
Select every available row	Select all
Add the selection and close the picker	OK
Save the tabs	Save

The picker excludes widgets already on the active tab and sorts the available titles. A successful

save displays `Your request was completed successfully`. A failed request displays `An error occurred while processing your request`.

Result: The selected cards and charts are included on the active tab, and the saved arrangement remains available after edit mode ends.

Edit tabs

Use the edit controls when you need to restore standard tabs, add widgets, or save the arrangement.

Prerequisites

- Open the card-and-chart surface in edit mode.

Steps

1. Choose the edit action for your change.

If you need to...	Select
Restore standard tabs	Restore Standard Tabs , then Restore
Add a widget	Widget
Save the tabs	Save

Result: The edit controls perform the selected tab or widget change while edit mode is available.

Handle workspace availability branches

The workspace surface changes with your role, subscription, saved tabs, and edit mode.

Prerequisites

- Have the workspace surface open.

Steps

1. Choose the path that matches what you see.

If you see...	Use this path
My Desk	Follow Set your My Desk view .
Principal Desk	Use the available principal-user workspace tabs.
Tasks, Activities, or Calendar disabled	Use the available tabs or ask your administrator about the required subscription.
Your role has no dashboard	Read Kindly, Contact your administrator to define a dashboard , then contact your administrator.
Card-and-chart view without widget-editing controls	Open the card-and-chart view in edit mode before changing widgets.

Result: You are using the workspace branch available for your role and subscription.

When a workspace change does not appear

Use this table when a workspace action does not produce the expected screen response.

What you see	What it means	What to do
Data saved Successfully after saving a task or activity	The task or activity save completed.	Continue from the updated task list or activity view.
Error while deleting task	The task deletion failed.	Review the task and try the deletion again.

What you see	What it means	What to do
Are you sure that you want to mark this task as completed?	PAMS is asking you to confirm completion.	Confirm the action in the confirmation dialog.
Are you sure that you want to un-complete this task?	PAMS is asking you to confirm removing completion.	Confirm the action in the confirmation dialog.
This action is only allowed if you belong to that branch	The activity action is restricted to the job branch.	Use an activity belonging to your branch.
One topic and at least one note is required	The activity has no topic and note combination required for completion.	Add one topic and at least one note.
There is no topic to print	The activity has no topic available for printing.	Add a topic before printing.
Your request was completed successfully	The card-and-chart request completed successfully.	Continue with the saved arrangement.
An error occurred while processing your request	The card-and-chart request failed.	Review the changes and submit them again.
List headers differ from another workspace view	The list columns depend on your saved layout.	Work from the headers visible in the current list.

Result: You have a message-specific action or a supported next step for the workspace response.

Continue from your workspace

An opened record is a linked record that you inspect without leaving My Desk. Use the detailed pages when the next task belongs to the record rather than to the workspace arrangement.

Prerequisites

- Have a linked record opened in My Desk.

Steps

1. Select a linked record in My Desk.
2. Select its titled tab to return to the opened record.
3. Select the pen action when you need the record's normal page.
4. Select the close action when you finish reviewing the record.

Saving a new task validates the task form, reloads the task list, and closes the task popup. Use

[Manage tasks from My Desk](#) for task actions, [Record activities from My Desk](#) for activity actions, Cards and charts for reading cards and charts, and Widget catalog for widget choices.

Result: You are at the detailed page or workspace view for the next task.

Related

- [My Desk workspace.](#)
- [Manage tasks from My Desk.](#)
- [Record activities from My Desk.](#)
- Cards and charts.
- Widget catalog.
- [Understanding the interface.](#)