My Desk

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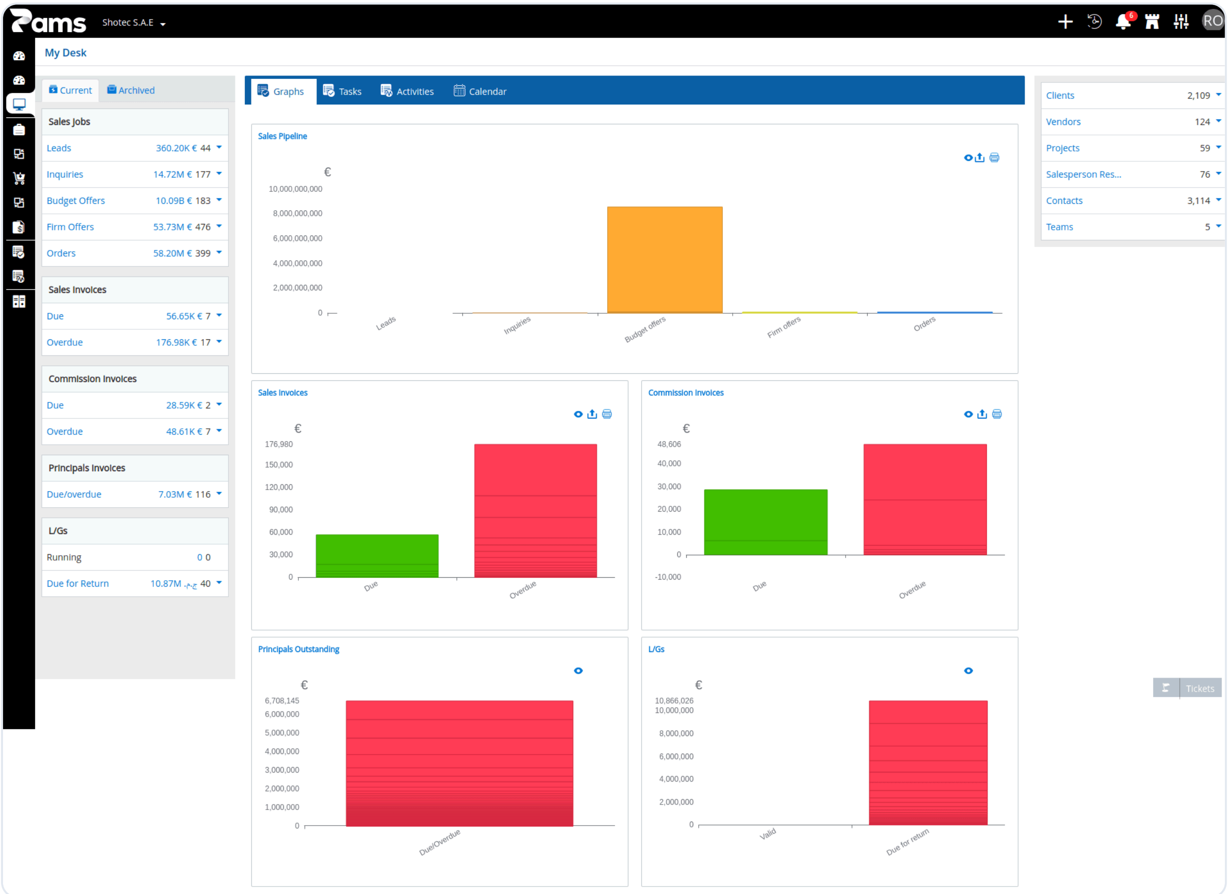
Applications › My Desk



My Desk — My Desk

Overview

My Desk is a central workspace for accessing desk-level actions, including graphs, tickets, and file attachments. It is intended for users who need to review information or add supporting files while working across Sales, PM, Purchasing, Warehouse, Finance, and related applications.

Use My Desk when you need a single entry point for the available desk actions rather than working from a specific business record. The available actions on this screen are limited to the controls displayed on My Desk.

Workflow

1. Open **My Desk** from the application navigation.

   My Desk is available alongside the other application areas, including **Dashboard**, **Reports**, **Sales**, **PM**, **Purchasing**, **Warehouse**, **Finance**, **Tasks**, **Activities**, and **Data**.

   > **Note:** Use the application navigation to move to the business area relevant to your current work. My Desk provides the available desk actions; it does not replace the operational screens in the individual applications.

2. Decide whether you need to review graphical information.

   Select **graphs** when you need to use the graph action available from My Desk.

   Return to My Desk when you need to perform another available action, such as working with tickets or attaching a file.

3. Decide whether your task concerns tickets.

   Select **Tickets** to use the ticket action from My Desk.

   Use this action when your work requires the ticket option shown on the My Desk screen. The screen does not provide ticket fields, ticket statuses, or ticket workflow controls; complete only the actions available after selecting **Tickets**.

4. Decide whether you need to add a supporting file.

   Select **Attach** to add a file through the available attachment action.

   The **files[]** field is the file field available on My Desk. Use it when you need to include one or more files as part of the current desk activity.

   > **Tip:** Attach files only when they are relevant to the work you are completing. This helps keep the desk workspace focused and makes supporting material easier to identify.

5. Confirm the current My Desk action.

Select **Ok** when you are ready to confirm the action currently presented on My Desk.

Use **Ok** only after you have completed the required graph, ticket, or attachment action. If you still need to add or review information, remain on the relevant action before confirming.

Examples

Attach a supporting document from My Desk

A Project Manager is reviewing information for a project and needs to include a supporting document in the current desk activity.

1. Open **My Desk** from the application navigation.
2. Review the available actions and determine that a file must be included.
3. Select **Attach**.
4. Use the **files[]** field to add the supporting document, such as `Project-Alpha-Supplier-Offer.pdf`.
5. Verify that the required file has been added through the attachment action.
6. Select **Ok** to confirm the completed My Desk action.

The Project Manager can then use the application navigation to continue in **PM**, **Purchasing**, or another appropriate application area.

Tips

> **Tip:** Use **My Desk** as a starting point for the actions displayed on the screen. For operational work in a specific area, use the relevant application navigation item, such as **Sales**, **PM**, **Purchasing**, **Warehouse**, or **Finance**.

> **Note:** The **files[]** field is the only file-related field shown on My Desk. Ensure that the needed files are added before selecting **Ok**.

> **Warning:** Do not assume that **graphs** or **Tickets** changes a business record status. No record statuses, approval states, or lifecycle transitions are displayed

> on the My Desk screen.

Troubleshooting

Symptom	Likely cause	Fix
You cannot find the My Desk workspace.	You are working in another application area.	Select **My Desk** from the application navigation.
A required supporting file has not been included.	The attachment action was not completed before confirmation.	Return to My Desk, select **Attach**, and use the **files[]** field to add the required file before selecting **Ok**.
You need to work on Sales, PM, Purchasing, Warehouse, or Finance information rather than a desk action.	My Desk does not display the operational fields for those applications.	Use the appropriate navigation control, such as **Sales**, **PM**, **Purchasing**, **Warehouse**, or **Finance**.
You are unsure whether to select **Ok**.	The current graph, ticket, or attachment action may not be complete.	Review the current action and select **Ok** only after the required work has been completed.

Related pages

- My Desk — Overview
- My Desk — Learning Path