

# Budget Overview- Personalize Columns

1

(Homepage) Accounting & Financial Reports > (Tile) Budgets Overview

**Budgets Overview**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** Add a New Value

**Search Criteria**

Inquiry Name begins with

**Search** Clear Basic Search Save Search Criteria

**Search Results**  
View All First 1-8 of 8 Last

**Inquiry Name Description**

BUDGET	Review Budgets
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**Budget Inquiry Criteria**  
**Budget Overview**

**Budget Type**

\*Business Unit  Ledger Group/Set  Ledger Inquiry Set

View Stat Code Budgets

**Time Span**

\*Type of Calendar

**Budget Criteria**

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)
<input checked="" type="checkbox"/>	OPE	BY	<input type="text" value="2019"/>	<input type="text" value="2019"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	OPR	BY	<input type="text" value="2019"/>	<input type="text" value="2019"/>	<input checked="" type="checkbox"/>

**ChartField Criteria**

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text" value="i"/>	<input type="text" value=""/>	Update/Add
Dept	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text" value="i"/>	<input type="text" value=""/>	Update/Add
Fund	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text" value="i"/>	<input type="text" value=""/>	Update/Add
Function	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text" value="i"/>	<input type="text" value=""/>	Update/Add
Cost Centr	<input type="text" value="14021600"/>	<input type="text" value="%"/>	<input type="text" value="i"/>	<input type="text" value=""/>	Update/Add
Project	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text" value="i"/>	<input type="text" value=""/>	Update/Add

**Save** Return to Search Previous in List Next in List Notify Refresh Add Update/Display

1. Navigate to the **Budgets Overview** page.
2. Select the **Find an Existing Value** tab and click **Search** to look for your saved Inquiry Names.
3. Select an inquiry name under **Search Results**. In this example we will pick BUDGET.
4. Under **Chartfield Criteria** enter a funding source. In this example will enter a Cost Center.
5. Click the **Save** button at the bottom of the page.
6. Click the **Search** button at the top of the page.

# Budget Overview- Personalize Columns

Budget Overview Inquiry

7

Budget Overview Results

8 Personalize Find View All

	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Cost Center	ChartField1 Description	Function	Class Description	Project	Project Description
1	A1000	Staff Salaries	2100	E&G General Funds	301500	PeopleSoft	14021600	PEOPLESFT VPBA	700	Institutional Support		
2	A1200	Wages	2100	E&G General Funds	301500	PeopleSoft	14021600	PEOPLESFT VPBA	700	Institutional Support		
								PEOPLESFT BA	700	Institutional Support		
								PEOPLESFT BA	700	Institutional Support		

Grid Customization

Budget Overview Results

### Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

**Column Order**

- Show Budget Details (frozen)
- Show Budget Transaction Types (frozen)
- Account
- Account Description
- Fund (hidden)
- Fund Code Description (hidden)
- Dept
- Department Description
- Cost Center
- ChartField1 Description
- Function (hidden)
- Class Description (hidden)
- Pre-Encumbrance (hidden)
- Percent Available (hidden)
- Project
- Project Description
- Budget Period
- Budget
- Expense
- Encumbrance
- Available Budget\*
- Ledger Group

**Sort Order**

- Descending
- Hidden
- Frozen

11

10

9

12

OK Cancel Preview Copy Settings Share Settings Delete Settings

7. Note the six new column header descriptions that are highlighted in yellow.
8. You can customize your view by selecting the **Personalize** link located above the headers.
9. A pop-up window will show all the columns under Budget Overview. Select a column you want to hide under the **Column Order** section.
10. Use the **Hidden** box to "Hide" your selected column.
  - a. Please note, select only one column at a time
  - b. We recommend hiding columns in blue to reduce the size of the Budget Overview page.
11. You can also arrange the columns the way you like.
  - a. Use the **Arrows** located above the **Hidden** field box to move columns up or down the list.
12. Use the "action" buttons:
  - a. Click **Preview** button to review your updates before saving.
  - b. Click **Cancel** button to undo your updates.