

Budget Overview- Personalize Columns

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(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

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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

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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.