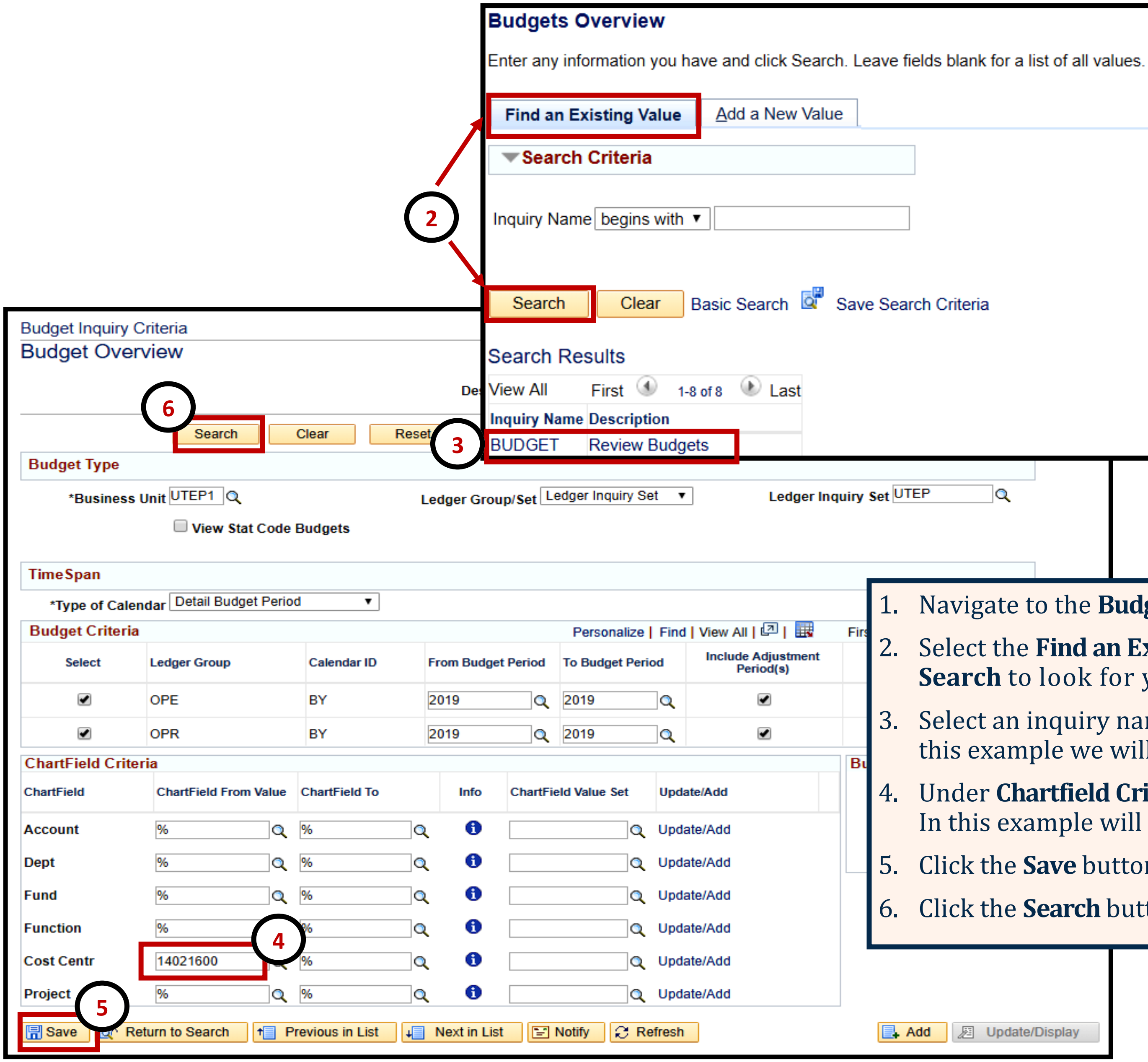
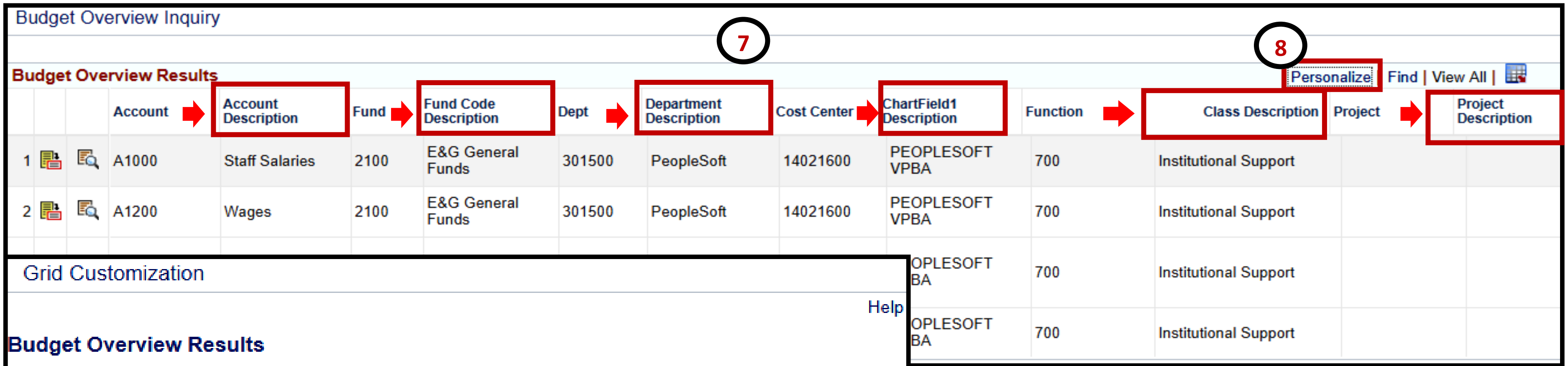
Budget Overview– Personalize Columns

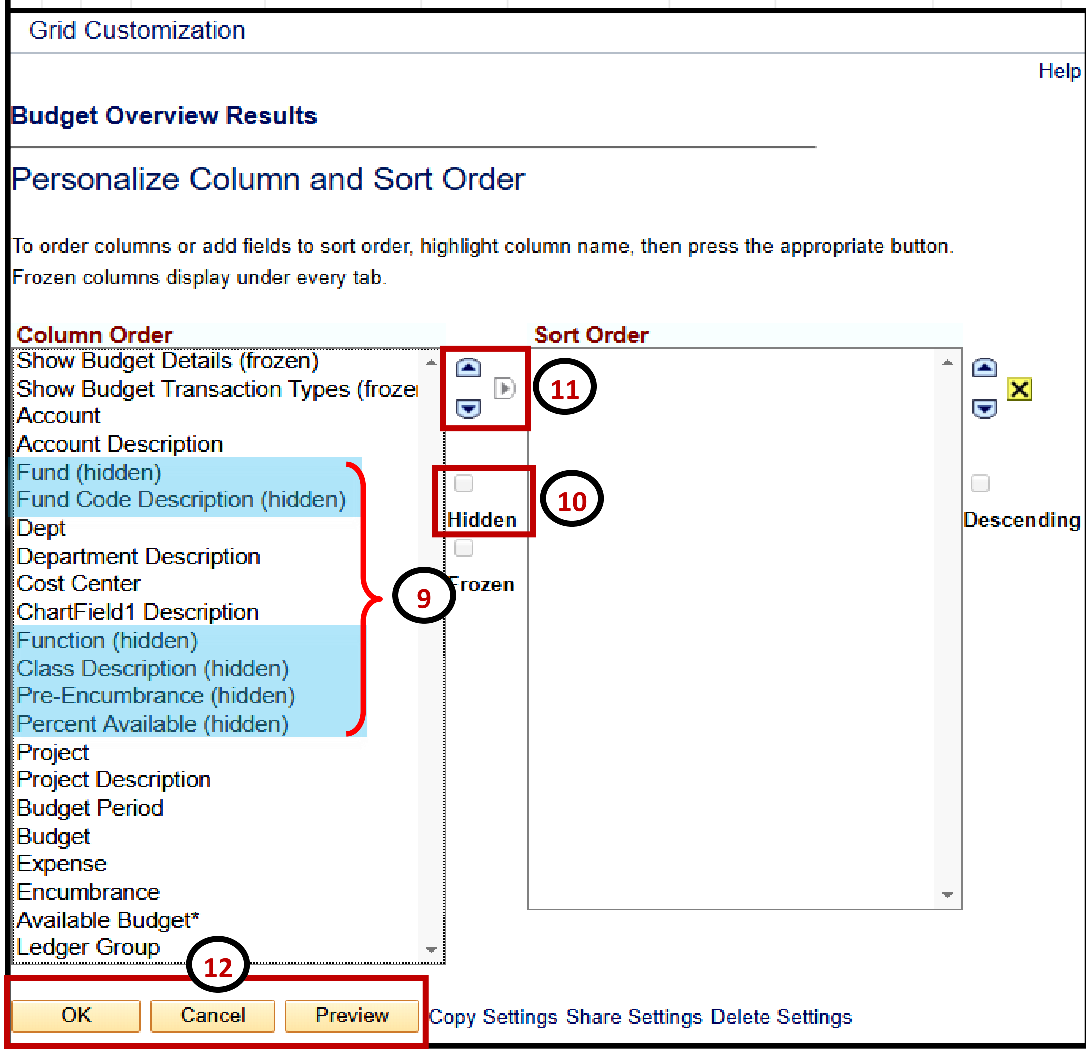
1 (Homepage) Accounting & Financial Reports > (Tile) Budgets Overview



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





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.