Budget Overview Changes in PS 9.2

You may have noticed that the screens in the upgraded PeopleSoft software look a little different. The same entry points and pathways are there, it just looks a little different. There are changes to the Budget Overview screen that I’d like to highlight for you. In the near future we will change our instructions on our webpage. Here’s a quick overview.

The full chart string does not appear on the screen

1. You’ll need to use the scroll bar on the bottom of the “Budget Overview Results” box.

2. Another option is to click on the arrow icon next to the words “View All” on the right side of the box. When you hit the icon the screen will expand showing the full chart string. To return to the Overview screen hit the “Return” button at the bottom left of the screen.

3. You may customize the order in which the data elements appear and which data elements show in the Budget Overview Results box. This will reposition the data you view the most into the initial viewing pane so you do not have to use option 1 & 2 above.

   a. Click on “Personalize.”
b. Using the “Personalizer” select the order in which you’d like the data elements to appear by using the arrows OR if you’d like to hide or unhide the data element by highlighting the data element name and clicking the appropriate box. The changes only affect your view.

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.

4. Drilling down to see journals and actual expenditures/revenue entries has not changed.

5. Exporting the data on the screen into EXCEL has not changed.