

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.

The screenshot shows a table titled "Budget Overview Results" with columns: Ledger Group, Account, Fund, Dept, Program, Class, Bud Ref, Budget Period, Budget, Expense, and Encumbrance. Three rows of data are visible. A red oval highlights the scroll bar at the bottom of the table. A red arrow points from the scroll bar to the "View All" icon in the top right corner of the table area.

	Ledger Group	Account	Fund	Dept	Program	Class	Bud Ref	Budget Period	Budget	Expense	Encumbrance
1	APPROP	500000	10600	1045104	16200	11000	2013	2013	336,529.150	369,323.150	0.000
2	APPROP	600000	10600	1045104	16200	11000	2013	2013	1,981.740	1,981.740	0.000
3	APPROP	700000	10600	1045104	16200	11000	2013	2013	6,538.040	6,538.040	0.000

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.

The screenshot shows a table titled "Budget Overview Inquiry" with columns: Ledger Group, Account, Fund, Dept, Program, Class, Bud Ref, Budget Period, Budget, Expense, Encumbrance, Pre-Encumbrance, Available Budget*, and Percent Available. Three rows of data are visible. A red oval highlights a "Return" button at the bottom left of the table area.



	Ledger Group	Account	Fund	Dept	Program	Class	Bud Ref	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
1	APPROP	500000	10600	1045104	16200	11000	2013	2013	336,529.150	369,323.150	0.000	0.000	-32,794.000	-9.74
2	APPROP	600000	10600	1045104	16200	11000	2013	2013	1,981.740	1,981.740	0.000	0.000	0.000	0.00
3	APPROP	700000	10600	1045104	16200	11000	2013	2013	6,538.040	6,538.040	0.000	0.000	0.000	0.00

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."

The screenshot shows the "Budget Overview Results" table with the "Personalize" button in the top right corner highlighted with a red oval.

	Ledger Group	Account	Fund	Dept	Program	Class	Bud Ref	Budget Period	Budget	Expense	Encumbrance
1	APPROP	500000	10600	1045104	16200	11000	2013	2013	336,529.150	369,323.150	0.000
2	APPROP	600000	10600	1045104	16200	11000	2013	2013	1,981.740	1,981.740	0.000
3	APPROP	700000	10600	1045104	16200	11000	2013	2013	6,538.040	6,538.040	0.000

- 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 Hidden Frozen 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.

Column Order

- Show Budget Details (frozen)
- Show Budget Transaction Types (frozen)
- Ledger Group
- Account
- Fund
- Dept
- Program
- Class
- Bud Ref
- Budget Period
- Budget
- Expense
- Encumbrance
- Pre-Encumbrance
- Available Budget*
- Percent Available










Hidden

Frozen

Sort Order







Descending

OK
Cancel
Preview
Copy Settings

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.