

Budget Overview– Personalize Columns

1

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

Find an Existing Value

+ Add a New Value

Search Criteria

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

Recent Searches

Inquiry Name
[Show fewer options](#)

2

Search Results

12 rows - User ID "6001142777"

View All <input type="button" value="Print"/>		First	1-10 of 12	Last
Inquiry Name	Description			
BO 2017	(blank)			>

3

1. Navigate to the **Budgets Overview** page.
2. Click on **Search** to find the result for **Inquiry Names**.
3. Select an inquiry name under **Search Results**. In this example we will pick BO 2017

Budget Overview- Personalize Columns

Budget Inquiry Criteria
Budget Overview

Inquiry BO 2017

6

Description



Search

Clear

Reset

Budget Type

*Business Unit UTEP1

Ledger Group/Set Ledger Inquiry Set

Ledger Inquiry Set UTEP

View Stat Code Budgets

Time Span

*Type of Calendar Detail Budget Period

Budget Criteria

Personalize | Find | View All | First 1-2 of 2 Last

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	OPE	BY	2017	2017	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	OPR	BY	2017	2017	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Dept	%	%	i		Update/Add
Fund	%	%	i		Update/Add
Function	%	%	i		Update/Add
Cost Centr	19507731	%	i		Update/Add
Project	%	%	i		Update/Add

Budget Status

- Open
- Closed
- Hold

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.

5

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Budget Overview- Personalize Columns

Budget Overview Results										
ChartField1 Description	Project Description	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Class Description	Budget Period	Budget
1	Biostats	A4000	Operating Expenses	3100	DES Organized Act Rel to Instr	750300	Border Biomedical Research Ctr	Research	2017	8,969.75
2	Biostats	A9000	Reserve	3100	DES Organized Act Rel to Instr	750300	Border Biomedical Research Ctr	Research	2017	0.00

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

- Details (hidden)
- Budget Transaction Types (hidden)
- Ledger Group (hidden)
- Cost Center (hidden)
- ChartField1 Description
- Project
- Project Description
- Class Description
- Account
- Account Description
- Fund (hidden)
- Fund Code Description (hidden)
- Dept
- Department Description
- Function (hidden)
- Budget Period
- Budget
- Expense
- Encumbrance
- Pre-Encumbrance (hidden)
- Available Budget*
- Revenue Estimate
- Recognized Revenue
- Collected Revenue
- Available Budget*
- Uncollected Revenue (Rec-Coll)*
- Percent Available (hidden)

Sort Order

Hidden
 Frozen

Descending

OK
Cancel
Preview

Settings Share Settings Delete Settings

7. Note the six new column header descriptions.
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.
 - c. Click **OK** button to "Save" your updates.