

"Working with Pagelets" Job Aid

What is a Pagelet:

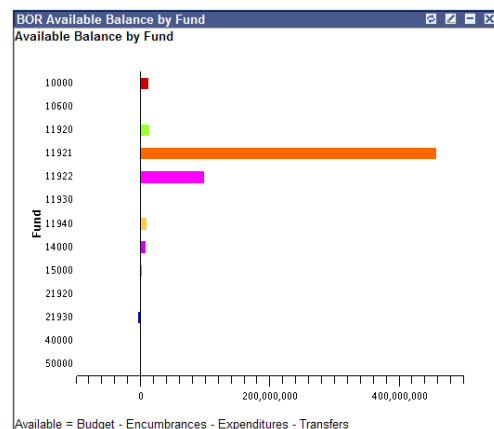
In PeopleSoft, pagelets are designed to display summary information within a small area on the homepage. They can provide users with a snapshot of relevant content. You can personalize your PeopleSoft homepage by displaying pagelets, and arranging them in the desired layout.

Available Pagelets:

OIIT has recently made available the following pagelets:

- **BOR Available Balance by Fund**

- Expenditure Available Balance by Fund (Graph)
- High-level graph depicting the available balance by fund
- Retrieve actual amount available by hovering over bar with mouse
- Target Audience: Designed for those who have financial accountability as part of their job responsibilities
- Formula: $\text{APPROP_BD} - \text{APPROP_EN} - \text{ACTUALS} = \text{Available Balance}$



- **BOR Expense Budget to Actuals**

- Expenditure Available Balance by Fund (Detail)
- Detailed table depicting the available balance by fund
- Target Audience: Designed for those who have financial accountability as part of their job responsibilities
- Same information as graph pagelet above, yet more detail provided
- In this pagelet, there is a link to the Full Query Results, which can be downloaded to Excel
- Formula: $\text{APPROP_BD} - \text{APPROP_EN} - \text{ACTUALS} = \text{Available Balance}$
 - Budget Amount = APPROP_BD (5X – 8X Accounts)
 - Transferred Amount = APPROP_BD (9X Account)
 - Encumbered Amount = APPROP_EN
 - Expenditures = ACTUALS
 - Variance Amount = Available Balance

Unit	Fund	Budget Amount	Transferred Amount	Encumbered Amount	Expended Amount	Variance Amount
98000	10000	54,214,393.11	15,664.00	8,745,233.66	34,530,482.57	10,954,340.88
98000	10600	.00	.00	.00	.00	.00
98000	11920	60,171,307.00	.00	1,326,861.00	45,838,557.38	13,005,888.62
98000	11921	2,014,109,782.89	.00	.00	1,557,955,907.00	456,153,875.89
98000	11922	318,288,000.00	.00	.00	220,407,764.89	97,880,235.11
98000	11930	2,749,026.76	.00	583,025.91	1,916,363.60	249,637.25
98000	11940	35,769,016.24	.00	476,091.68	26,738,799.11	8,554,125.45
98000	14000	32,216,573.18	.00	4,893,601.64	20,004,290.88	7,318,680.66
98000	15000	967,310.07	.00	.00	102,772.33	864,537.74
98000	21920	.00	.00	.00	153,891.33	-153,891.33
98000	21930	.00	.00	.00	4,278,064.33	-4,278,064.33
98000	40000	.00	.00	.00	750,000.00	-750,000.00
98000	50000	.00	.00	.00	.00	.00

[Full Query Results](#)

- **BOR Revenue Budget to Actuals**

- Revenue Available Balance by Fund
- Detailed table comparing budgeted revenue with actual revenue recognized and collected
- Target Audience: Designed for those who have financial accountability as part of their job responsibilities
- In this pagelet, there is a link to the Full Query Results, which can be downloaded to Excel
- Formula: REVEST_BD – ACTUALS = Variance (revenue available)
 - Budget = REVEST_BD (4X Account)
 - Revenues = ACTUALS

Unit	Fund	Budgeted Revenue	Actuals	Variance
98000	10000	54,979,520.11	52,634,203.26	2,345,316.85
98000	10600	.00	2,769.87	-2,769.87
98000	11920	60,171,307.00	60,171,357.94	-50.94
98000	11921	2,014,109,782.89	1,556,882,366.00	457,227,416.89
98000	11922	318,288,000.00	216,572,446.49	101,715,553.51
98000	11930	2,807,000.00	2,947,000.00	-140,000.00
98000	11940	35,711,043.00	35,571,043.00	140,000.00
98000	14000	31,564,145.14	26,481,626.56	5,082,518.58
98000	15000	.00	138,250.31	-138,250.31
98000	20000	1,952,253.00	3,646,219.00	-1,693,966.00
98000	21920	78,891.33	141,667.70	-62,776.37
98000	21930	1,556,227.00	4,173,864.18	-2,617,637.18
98000	40000	.00	.00	.00
98000	50000	.00	.00	.00

[Full Query Results](#)

- **BOR Budget to Actuals Projects**

- Detailed table showing available balance by Project
- Cumulative look at entire project
- Project hyperlink takes you to Project Definition
- Target Audience: Designed for those who have project financial accountability as part of their job responsibilities
- In this pagelet, there is a link to the Full Query Results, which can be downloaded to Excel
- Formula: PROJ_GR_BD – PROJ_GR_EN – ACTUALS = Available Balance
 - Budget Amount = PROJ_BR_BD (5X – 8X Accounts)
 - Transferred Amount = PROJ_GR_BD (9X Account)
 - Encumbered Amount = PROJ_GR_EN
 - Expenditures = ACTUALS
 - Variance Amount = Available Balance

Unit	Project	Descr	Status	Budget Amount	Transferred Amount	Encumbered Amount	Expended Amount	Variance Amount
98000	000	EAS & EIS General	Active	.00	.00	.00	56.46	-56.46
98000	0000000000	ALL Projects-Interfund Offset	Active	.00	.00	.00	5,629,620.29	-5,629,620.29
98000	020	State Appr Research Consortium	Active	5,188,053.00	.00	.00	15,793,148.00	-10,605,095.00
98000	100	Lottery Funds - Other Entities	Active	.00	.00	.00	101,145,514.00	-101,145,514.00
98000	105	DOE - Catalyst Fund - P-16	Active	603,420.25	.00	.00	603,417.15	3.10
98000	106	DOE - Catalyst Fund - P-16, Ex	Active	122,388.73	.00	.00	122,388.73	.00
98000	107	Federal Funds/Title II-A	Active	3,600,343.78	.00	.00	3,467,270.29	133,073.49

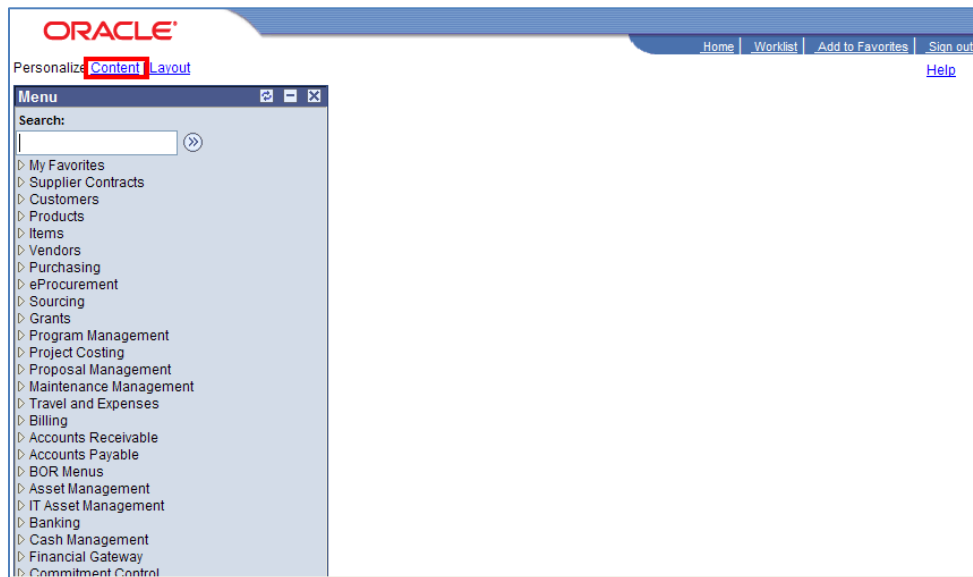
[Full Query Results](#)

How Pagelets Operate:

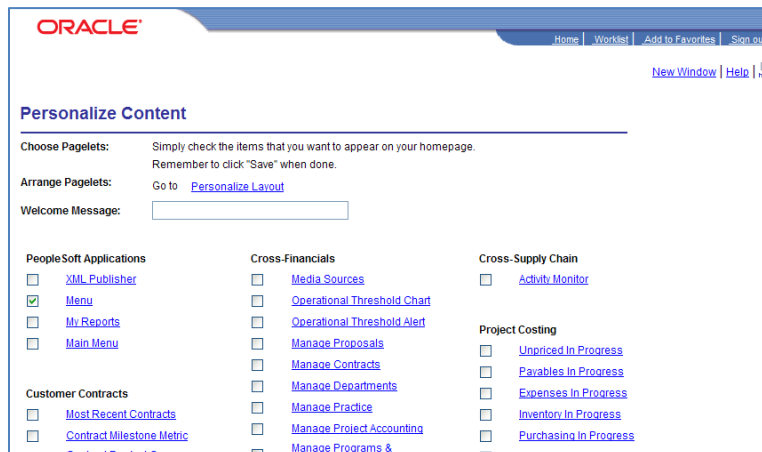
- Installing a pagelet on your homepage will affect the time it takes you to login to the database.
- After you login, the pagelets run their queries so that the data in the pagelet is up-to-date when you first open the application.
- The data will remain static unless you refresh the pagelet (or login to the database after it closes).
- Depending on the number of pagelets displayed, the amount of time it takes for you to login may exceed two minutes (all four pagelets displayed).

How to Install Pagelets:

1. From the PeopleSoft Homepage, next to Personalize, select "**Content.**"



2. On the "Personalize Content" page, scroll to the **General Ledger** section.




3. Select the pagelet you want to add to your homepage.

General Ledger

- ☐ [GAFirst Announcements](#)
- ☐ [BOR Available Balance by Fund](#)
- ☐ [BOR Expense Budget to Actuals](#)
- ☐ [BOR Budg to Actual w/ Acct](#)
- ☐ [BOR Project Budg to Act w/Bref](#)
- ☐ [BOR Budget to Actuals Projects](#)
- ☐ [RSA Revenue to Expense](#)
- ☒ [BOR Revenue Budget to Actuals](#)
- ☐ [BOR Terminated Empl w/ Secrv](#)
- ☐ [Expense Variance](#)

 [Save](#) [Return to Home](#)

 [Notify](#)

4. **Save** the page. You will return to your homepage.
5. Your pagelet will be displayed under your menu and will indicate that it needs to be customized first. Select the **"Customize this pagelet"** link.

- ▷ Financial Gateway
- ▷ Commitment Control
- ▷ General Ledger
- ▷ Allocations
- ▷ Set Up Financials/Supply Chain
- ▷ Background Processes
- ▷ Worklist
- ▷ Application Diagnostics
- ▷ Tree Manager
- ▷ Reporting Tools
- ▷ PeopleTools
- [BOR Reporting Instance](#)
- [Schedule Query](#)
- [Change My Password](#)
- [My Personalizations](#)
- [My System Profile](#)
- [My Dictionary](#)

BOR Revenue Budget to Actuals   

Requires Customization

You must customize this pagelet before using it the first time.

[Customize this pagelet](#)

- Enter your personalization options (options are dependent on pagelet, however, you must input your business unit and budget reference).

Personalize BOR Revenue Budget to Actuals

Select from the available option(s) to personalize the display of this pagelet.

*Business Unit:

*Budget Reference:

[Reset to Defaults](#)

[Save](#) [Return to Home](#)

- Save** your personalizations.
- Your new pagelet will appear under your menu. See the next section for customizing the layout of your homepage.

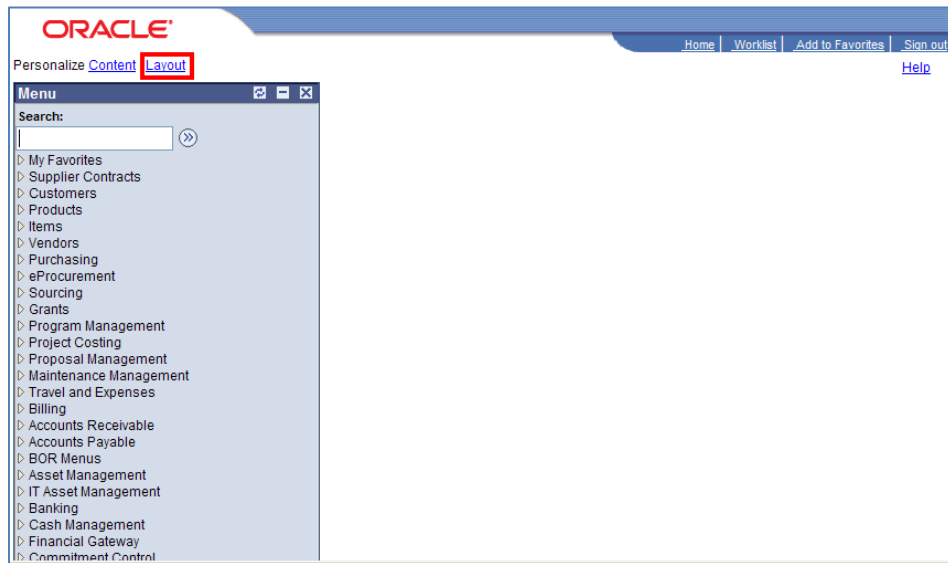
PeopleTools
[BOR Reporting Instance](#)
[Schedule Query](#)
[Change My Password](#)
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98000	50000	.00	.00	.00

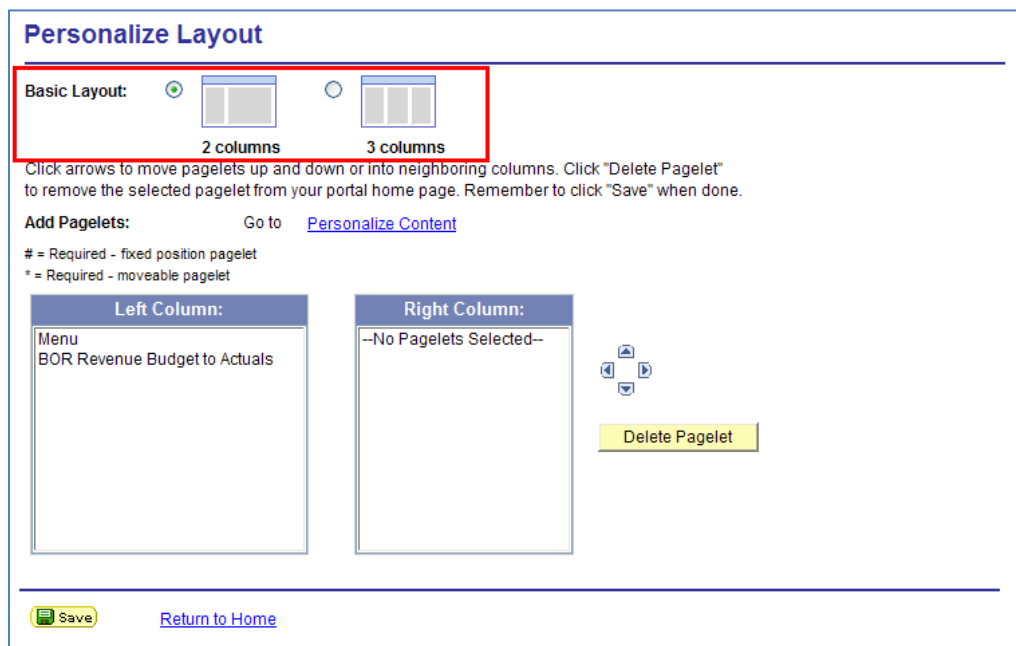
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Customizing Your Homepage Pagelet Layout:

1. In order to arrange the layout of your selected pagelets in the order most efficient for you, from the PeopleSoft Homepage, next to Personalize, select **"Layout."**





2. Next to **"Basic Layout"**, you can select whether you want your homepage separated into either two or three columns.



- To move pagelets to a different column, select the pagelet by highlighting it. Then select one of the **"move"** arrows to move it to the desired location.

Personalize Layout

Basic Layout:

☒  2 columns
 ☐  3 columns

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to [Personalize Content](#)


= Required - fixed position pagelet
* = Required - moveable pagelet

Left Column:

Menu
 BOR Revenue Budget to Actuals

Right Column:

--No Pagelets Selected--




Delete Pagelet

Save

[Return to Home](#)

- If you have more than one item in a column, you can use the "move up" or "move down" arrows to change the order of a pagelet.

- Save** your changes.
- The resulting homepage is shown here.



[Home](#)
[Worklist](#)
[Add to Favorites](#)
[Sign out](#)

Personalize [Content](#) | [Layout](#)
[Help](#)

Menu

Search:

- My Favorites
- Supplier Contracts
- Customers
- Products
- Items
- Vendors
- Purchasing
- eProcurement
- Sourcing
- Grants
- Program Management
- Project Costing
- Proposal Management
- Maintenance Management
- Travel and Expenses
- Billing
- Accounts Receivable
- Accounts Payable
- BOR Menus
- Asset Management
- IT Asset Management
- Banking
- Cash Management
- Financial Gateway
- Commitment Control
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- Set Up Financials/Supply Chain
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98000	40000	.00	.00	.00
98000	50000	.00	.00	.00





[Full Query Results](#)

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7

Pagelet Icons:

The following icons are on every pagelet:

-  **Refresh:** Use this icon to refresh the pagelet (rerun the query) when needed
-  **Change/Personalize:** Use this icon to redo the pagelet personalization (i.e. Budget Year)
-  **Minimize:** Use this icon to minimize the pagelet so that all you see is the title bar
-  **Remove:** Use this icon to remove the pagelet from your homepage (you can add it again by going through the "Content" link)