“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: APPROP_BD – APPROP_EN – ACTUALS = 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: APPROP_BD – APPROP_EN – ACTUALS = 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
• **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: \( \text{REVEST}_{BD} - \text{ACTUALS} = \text{Variance (revenue available)} \)
    - Budget = \( \text{REVEST}_{BD} \) (4X Account)
    - Revenues = \( \text{ACTUALS} \)

• **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: \( \text{PROJ\_GR}_{BD} - \text{PROJ\_GR\_EN} - \text{ACTUALS} = \text{Available Balance} \)
    - Budget Amount = \( \text{PROJ\_BR}_{BD} \) (5X – 8X Accounts)
    - Transferred Amount = \( \text{PROJ\_GR}_{BD} \) (9X Account)
    - Encumbered Amount = \( \text{PROJ\_GR\_EN} \)
    - Expenditures = \( \text{ACTUALS} \)
    - Variance Amount = Available Balance
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.

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.
6. 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](image)

7. **Save** your personalizations.

8. Your new pagelet will appear under your menu. See the next section for customizing the layout of your homepage.

![BOR Revenue Budget to Actuals](image)
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.
3. 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.

   a. 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.

4. Save your changes.

5. The resulting homepage is shown here.
**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)