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# "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

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xpens	Available = Budget -		s - Expenditures	- Transfers	
xpens Fund	e Budget to Actu	ıals	s - Expenditures Encumbered Amount	Expended	₽ ∎ X Variance Amount
	e Budget to Actu	ials Transferred Amount	Encumbered	Expended Amount	Variance
Fund	e Budget to Actu Budget Amount	ials Transferred Amount	Encumbered Amount	Expended Amount	Variance Amount
Fund 10000	e Budget to Actu Budget Amount 54,214,393.11	ials Transferred Amount 15,664.00 .00	Encumbered Amount 8,745,233.66	Expended Amount 34,530,482.57 .00	Variance Amount 10,954,340.88
Fund 10000 10600 11920	e Budget to Actu Budget Amount 54,214,393.11 .00	ials Transferred Amount 15,664.00 .00	Encumbered Amount 8,745,233.66 .00 1,326,861.00	Expended Amount 34,530,482.57 .00	Variance Amount 10,954,340.88 .00 13,005,888.62
Fund 10000 10600 11920 11921	e Budget to Actu Budget Amount 54,214,393.11 .00 60,171,307.00	als Transferred Amount 15,664.00 .00	Encumbered Amount 8,745,233.66 .00 1,326,861.00	Expended Amount 34,530,482.57 .00 45,838,557.38	Variance Amount 10,954,340.88 .00 13,005,888.62 456,153,875.89

BOR Available Balance by Fu

ailable Balance by Fund

10000

11920

11921 11922

11930 III 940

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         11922         2,114,109,782.89         .00         .00         1,557,955,907.00         456,153,875.88           98000         11922         318,288,000.00         .00         00         220,407,764.89         97,880,255.19           98000         11930         2,749,026.76         .00         583,025.91         1,916,363.60         249,637,22           98000         11940         35,769,016.24         .00         476,091.68         26,738,799.11         8,554,125.43           98000         14000         32,216,573.18         .00         4,893,601.64         20,004,290.88         7,318,680.66           98000         1500         967,310.07         .00         .00         102,772.33         884,537.74           98000         21920         .00         .00         .00         153,891.33         153,891.33           98000         21930         .00         .00         .00         .4,278,064.33         -4,278,064.33           980000         1930         .00	Unit	Fund	Budget Amount	Amount	Amount		Amount
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         456,153,875.88           98000         11922         318,288,000.00         .00         0.00         220,407,764.89         97,880,235.17           98000         11902         2,749,026,76         .00         583,025.91         1,916,363.60         249,637.25           98000         11904         35,769,016.24         .00         476,091.68         26,738,799.11         8,554.125.45           98000         11400         32,216,573.18         .00         4,893,601.64         20,004,290.88         7,318,680.60           98000         196,010.07         .00         .00         102,772.33         864,537.74           98000         1920         .00         .00         .00         153,891.33         -153,891.33           98000         21920         .00         .00         .00         .4278,064.33         -4,278,064.33           98000         21930         .00         .00         .00         .00         .00         .00           98000         50000         .00	98000	10000	54,214,393.11	15,664.00	8,745,233.66	34,530,482.57	10,954,340.88
98000         11921         2.014,109,782.89         .00         .00         1.557,955,907.00         456,153,875.86           98000         11922         318,288,000.00         .00         00         220,407,764.89         97,880,235.1           98000         11930         2,749,026.76         .00         583,025.91         1.916,363.60         249,637.25           98000         11900         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         1920         .00         .00         .00         153,891.33         -153,891.33           98000         21920         .00         .00         .00         153,891.33         -4,278,064.33           98000         21930         .00         .00         .00         .00         .750,000.00           98000         50000         .00         .00         .00         .00         .00	98000	10600	.00	.00	.00	.00	.00
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         1920         .00         .00         .00         102,772.33         864,537.74           98000         1920         .00         .00         .00         153,891.33         -153,891.33         -153,891.33           98000         21920         .00         .00         .00         4,278,064.33         -4,278,064.33           98000         21930         .00         .00         .00         .00         .00         .00         .00           98000         50000         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00         .00 </td <td>98000</td> <td>11920</td> <td>60,171,307.00</td> <td>.00</td> <td>1,326,861.00</td> <td>45,838,557.38</td> <td>13,005,888.62</td>	98000	11920	60,171,307.00	.00	1,326,861.00	45,838,557.38	13,005,888.62
98000         11930         2,749,026,76         .00         583,025,91         1,916,363,60         249,637,22           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         123,781,33         -153,891,33         -153,891,33         -153,891,33         -94,780,64,33         -4,278,064,33         -4,278,064,33         -4,278,064,33         -4,278,064,33         -4,278,064,33         -4,278,064,33         -4,278,064,33         -4,278,064,33         -95,000,00         -00         .00	98000	11921	2,014,109,782.89	.00	.00	1,557,955,907.00	456,153,875.89
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         884,537.7           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         2000         .00         .00         .00         .00         -750,000.00           98000         50000         .00         .00         .00         .00         .00	98000	11922	318,288,000.00	.00	.00	220,407,764.89	97,880,235.11
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 50000         .00         .00         .00         .00         .750,000.00         -750,000.00           98000 50000         .00         .00         .00         .00         .00         .00         .00	98000	11930	2,749,026.76	.00	583,025.91	1,916,363.60	249,637.25
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	98000	11940	35,769,016.24	.00	476,091.68	26,738,799.11	8,554,125.45
98000 21920         .00         .00         .00         153,891.33         -153,891.33	98000	14000	32,216,573.18	.00	4,893,601.64	20,004,290.88	7,318,680.66
98000 21930         .00         .00         .00         4,278,064.33         -4,278,064.33         94,278,064.33         -4,278,064	98000	15000	967,310.07	.00	.00	102,772.33	864,537.74
98000 40000         .00         .00         .00         750,000.00         -750,000.00           98000 50000         .00 <td< td=""><td>98000</td><td>21920</td><td>.00</td><td>.00</td><td>.00</td><td>153,891.33</td><td>-153,891.33</td></td<>	98000	21920	.00	.00	.00	153,891.33	-153,891.33
98000 50000 .00 .00 .00 .00 .00	98000	21930	.00	.00	.00	4,278,064.33	-4,278,064.33
	98000	40000	.00	.00	.00	750,000.00	-750,000.00
Full Query Results	98000	50000	.00	.00	.00	.00	.00
				Full Query	Results		

o In this pagelet, there is a link to the Full Query Results, which can be downloaded to Excel

BOR E

- 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

BOR Re	evenue Buc		🔁 🗹 🗖 🗙	
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 Resi	ults	

- Formula: REVEST\_BD ACTUALS = Variance (revenue available)
  - Budget = REVEST\_BD (4X Account)
  - Revenues = 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: 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

BOR E	Budget to Ac	tuals Proje:	cts					🛛 🗹 🖃 🗙
Unit	Project	Descr	Status	Budget Amount	Transferred Amount	Encumbered 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		5,188,053.00	.00	.00	15,793,148.00	-10,605,095.00
98000	<u>100</u>	Lottery Funds - Other Entities	Active	.00	.00	.00	101,145,514.00	101,145,514.00
98000	<u>105</u>	DOE - Catalyst Fund - P-16	Active	603,420.25	.00	.00	603,417.15	3.10
98000	<u>106</u>	DOE - Catalyst Fund - P- 16, Ex	Active	122,388.73	.00	.00	122,388.73	.00
98000	<u>107</u>	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.

ORAC	ILE.				Home Worklist	Add to Favorites Sign ou
Personalia	ze Content					
Choose Pagelets	s: Simply check		at you want to appear on your home	page.		
Arrange Pagelet	s: Go to Pers	onalize Layo	<u></u>			
Welcome Messa	ige:					
People Soft App	lications	Cros	s-Financials	Cross	-Supply Chain	
XML Pu	blisher		Media Sources		Activity Monitor	
Menu			Operational Threshold Chart			
My Rep	orts		Operational Threshold Alert	Projec	ct Costing	
Main Me	enu		Manage Proposals		Unpriced In Progress	
			Manage Contracts		Payables In Progress	
Customer Cont	racts		Manage Departments		Expenses in Progress	
Most Re	ecent Contracts		Manage Practice		Inventory In Progress	
	t Milestone Metric		Manage Project Accounting		Purchasing In Progress	1
-	1 Decident Occurs	_	Manage Programs &	_		

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

	GAFirst Announcements	
	BOR Available Balance by Fund	
	BOR Expense Budget to Actuals	
	BOR Budg to Actual w/ Acct	
	BOR Project Budg to Act wBref	
	BOR Budget to Actuals Projects	
	RSA Revenue to Expense	
<b>~</b>	BOR Revenue Budget to Actuals	
	BOR Terminated Empl w/ Secrty	
	Expense Variance	
🚽 Sav	Return to Home	

- 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.





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

Personalize BOR F	-	
Business Unit:	98000	Q
Budget Reference:	2010	Q
Reset to Defaults		
Save Return to Hon	<u>1e</u>	

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

<ul> <li>BOR Reporting Instance</li> <li>Schedule Query</li> </ul>									
		assword							
		izations							
	<u>stem P</u> ctionar								
	cuonan	L							
BOR R	levenu	e Budget to Act	uals	2 Z = X					
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						



#### **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."

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Personaliza Content Lavout
Personalize <u>Content</u>
Menu 😂 🗖
Search:
D My Favorites
Supplier Contracts
D Customers
D Products
D Items
D Vendors
<ul> <li>Purchasing</li> <li>Procurement</li> </ul>
D Sourcing
D Grants
Program Management
D Project Costing
D Proposal Management
Maintenance Management
Travel and Expenses
D Billing
Accounts Receivable
Accounts Payable
D BOR Menus
Asset Management
▷ IT Asset Management
▷ Banking
▷ Cash Management
D Financial Gateway
D Commitment Control

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

Personalize Layout	
Basic Layout:	
Click arrows to move pagelets up and down or into neighboring columns. Click to remove the selected pagelet from your portal home page. Remember to clic	
Add Pagelets: Go to <u>Personalize Content</u> # = Required - fixed position pagelet * = Required - moveable pagelet	
Left Column:       Right Column:         Menu       BOR Revenue Budget to Actuals      No Pagelets Selected	( ) Telete Pagelet
Return to Home	



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.

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: Right Column:
Menu BOR Revenue Budget to Actuals
Esave Return to Home

- 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.

ORACLE'				Home Worklist A	Id to Favorites Sign out
Personalize Content   Layout					Help
	BOR Re	Nonuo Pu	dget to Actuals		
			-		
Search:	Unit	Fund	Budgeted Revenue	Actuals	Variance
	98000	10000	54,979,520.11	52,634,203.26	2,345,316.85
D My Favorites	98000	10600	.00	2,769.87	-2,769.87
D Supplier Contracts	98000	11920	60,171,307.00	60,171,357.94	-50.94
D Customers	98000	11921	2,014,109,782.89	1,556,882,366.00	457,227,416.89
▷ Products ▷ Items	98000	11922	318.288.000.00	216.572.446.49	101.715.553.51
D Vendors	98000	11930	2.807.000.00	2.947.000.00	-140.000.00
D Purchasing	98000	11940	35,711,043.00	35,571,043.00	140,000.00
D eProcurement					
D Sourcing	98000	14000	31,564,145.14	26,481,626.56	5,082,518.58
D Grants	98000	15000	.00	138,250.31	-138,250.31
D Program Management	98000	20000	1,952,253.00	3,646,219.00	-1,693,966.00
<ul> <li>Project Costing</li> <li>Proposal Management</li> </ul>	98000	21920	78,891.33	141,667.70	-62,776.37
<ul> <li>Proposal Management</li> <li>Maintenance Management</li> </ul>	98000	21930	1,556,227.00	4,173,864.18	-2,617,637.18
Travel and Expenses	98000	40000	.00	.00	.00
D Billing	98000	50000	.00	.00	.00
D Accounts Receivable	1 20000	30000			.00
D Accounts Payable			Full Query Re	sults	
D BOR Menus					
Asset Management					
▷ IT Asset Management ▷ Banking					
D Cash Management					
D Financial Gateway					
Commitment Control					
D General Ledger					
D Allocations					
Set Up Financials/Supply Chain					
D Background Processes					
D Worklist					
II) anniestion Lisonnetice					

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# 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)
- E Minimize: Use this icon to minimize the pagelet so that all you see is the title bar
- **X Remove:** Use this icon to remove the pagelet from your homepage (you can add it again by going through the "Content" link)