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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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	Available = Budget	- Encumbrance:	s - Expenditures	- Transfers	
xpens	e Budget to Actu	Jals			2 Z = X
xpens Fund	e Budget to Actu Budget Amount	uals Transferred Amount	Encumbered Amount	Expended Amount	Variance Amount
xpens Fund 10000	e Budget to Actu Budget Amount 54,214,393.11	als Transferred Amount 15,664.00	Encumbered Amount 8,745,233.66	Expended Amount 34,530,482.57	 ☑ ☑ ☑ ☑ X Variance Amount 10,954,340.88
xpens Fund 10000 10600	e Budget to Actu Budget Amount 54,214,393.11 .00	Jals Transferred Amount 15,664.00 .00	Encumbered Amount 8,745,233.66 .00	Expended Amount 34,530,482.57 .00	 ☑ ■ X Variance Amount 10,954,340.88 .00
xpens Fund 10000 10600 11920	e Budget to Actu Budget Amount 54,214,393.11 .00 60,171,307.00	uals Transferred Amount 15,664.00 .00 .00	Encumbered Amount 8,745,233.66 .00 1,326,861.00	Expended Amount 34,530,482.57 .00 45,838,557.38	 ✓ ✓
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xpens Fund 10000 10600 11920 11921 11922	e Budget to Actu Budget Amount 54,214,393.11 .00 60,171,307.00 2,014,109,782.89 318,288,000.00	Jals Transferred Amount 15,664.00 .00 .00 .00 .00	Encumbered Amount 8,745,233.66 .00 1,326,861.00 .00	Expended Amount 34,530,482.57 .00 45,838,557.38 1,557,955,907.00 220,407,764.89	☑ ☑ ■ ☑ Variance Amount 10,954,340.88 .00 13,005,888.62 456,153,875.89 97,880,235.11

BOR Available Balance by Fu

ailable Balance by Fund

10000

11920

11921 11922

11930 III 940

Unit	Fund	Budget Amount	Amount	Amount	Amount	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		

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

BOK K	evenue Bu	aget to 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 Resi	ilte	

- 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

DOK D	budget to Ac	tuais Proje	CIS					
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	<u>020</u>	State Appr Research Consortium	Active	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.

ORA	CLE.				Home Worklist	Add to Favorites Sign o
Personal	ize Content					
Choose Pagele	ets: Simply check	k the items the	at you want to appear on your home	page.		
Arrange Pagel	ets: Go to Pers	onalize Layor	<u></u>			
Welcome Mes	sage:					
People Soft A	oplications	Cross	s-Financials	Cross	-Supply Chain	
XML F	Publisher		Media Sources		Activity Monitor	
Menu			Operational Threshold Chart			
My Re	ports		Operational Threshold Alert	Projec	et Costing	
Main Main	Menu		Manage Proposals		Unpriced In Progress	
			Manage Contracts		Payables In Progress	
Customer Co	ntracts		Manage Departments		Expenses in Progress	
Most	Recent Contracts		Manage Practice		Inventory In Progress	
Contr	act Milestone Metric		Manage Project Accounting		Purchasing In Progress	1
-		_	Manage Programs &	_		-

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

Gono	sral Lodnor	
	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/ Secrty	
	Expense Variance	
📳 Sav	Ne Return to Home	
"=" Noti	tify	

- 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).

elect from the available option	(s) to personalize the displa	to Actuals ay of this pagelet.
Business Unit:	þ 8000	Q
Budget Reference:	2010	Q
Reset to Defaults		
Save Return to Hom	<u>ie</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.

- <u>My Sy</u> - <u>My Di</u>	abolial	- <u>Change My Password</u> - My Personalizations									
- My Di	- My System Profile										
my Di	ctionary	(
BOR R	levenu	e Budget to Act	uals	🗟 🛛 🗆 🗙							
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							
	50000	00	00	00							



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."

ORACLE
Personaliza Content Lavout
ersonalize <u>Content</u>
Menu 😂 🗖
Search:
D My Favorites
Supplier Contracts
D Customers
> Products
D Items
D Vendors
Purchasing
D Sourcing
D Sourcing
D Granis
D Project Centing
Proper Costing
Naintenance Management
D Travel and Expenses
b Billing
D Accounts Receivable
Accounts Pavable
D BOR Menus
Asset Management
▷ IT Asset Management
D Banking
▷ Cash Management
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	< "Delete Pagelet" k "Save" when done.
Add Pagelets: Go to <u>Personalize Content</u> # = Required - fixed position pagelet * = Required - moveable pagelet	
Left Column: Menu BOR Revenue Budget to Actuals	() Delete 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:
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					
				<u>Home</u> <u>Worklist</u> <u>Ac</u>	Id to Favorites Sign out
Personalize <u>Content</u> <u>Layout</u>					<u>Help</u>
Menu 🖾 🗖 🔀	BOR Re	venue Bi	udget to Actuals		8 Z = X
Search:	Unit	Fund	Budgeted Revenue	Actuals	Variance
\otimes	98000	10000	54,979,520.11	52,634,203.26	2,345,316.85
▷ 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
Customers	98000	11921	2.014.109.782.89	1,556,882,366.00	457,227,416.89
D Items	98000	11922	318,288,000.00	216,572,446.49	101,715,553.51
▷ Vendors	98000	11930	2.807.000.00	2,947,000,00	-140,000,00
▷ Purchasing	98000	11940	35,711,043,00	35.571.043.00	140.000.00
▷ eProcurement	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
Program Management	98000	20000	1 952 253 00	3 646 219 00	-1 693 966 00
▷ Project Costing	98000	21920	78 891 33	141 667 70	-62 776 37
Proposal Management	98000	21930	1 556 227 00	4 173 864 18	-2 617 637 18
Maintenance Management Travel and Expenses	98000	40000	1,000,221.00	4,110,004.10	2,011,001.10
D Billing	08000	50000	00	00	00
Accounts Receivable	30000	50000	.00	.00	.00
D Accounts Payable			Full Query Re	esults	
D BOR Menus					
D IT Asset Management					
▷ Banking					
D Cash Management					
Financial Gateway					
D Commitment Control					
▷ Allocations					
D Set Up Financials/Supply Chain					
D Background Processes					
WORKIIST Application Disgnostics					

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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)