

Known Issue: KI9.2-96_GL – Grid Customizations for Budget Overview Results not Retained

UPDATED: February 11, 2019


STATUS: RESOLVED

IMPACT: Due to the PeopleTools Upgrade included with Release 5.40 in December 2018, users must re-establish their Grid Customizations for the Budget Overview. The functional workaround options provided serve as the resolution for this issue.

ORIGINALLY POSTED: December 1, 2018

After the application of Release 5.40, a user’s grid customizations for the Budget Overview Results section are no longer retained. All fields are visible and the user must use the horizontal scroll bar to view all of a row’s data (Navigation: **Commitment Control > Review Budget Activities > Budgets Overview**).

Current Production:

Budget Overview Results															Personalize Find View All  First 1-5 of 5 Last	
Ledger Group	Account	Fund	Dept	Department Description	Program	Class	Bud Yr	Project	Fiscal Year	Period	Budget	Expense	Encumbrance	Pre-Encumbrance Available Budget*	Percent Available	
1	APPROP	700000	10600	Visual Arts Fee Tier I	11100	11000	2019		2019	1	20,000.00	312.78	0.00	0.00	19,687.22	98.44
2	APPROP	700000	10600	Visual Arts Fee Tier I	11100	11000	2019		2019	2	0.00	36.43	-200.00	0.00	-236.43	0.00
3	APPROP	700000	10600	Visual Arts Fee Tier I	11100	11000	2019		2019	3	-1,447.00	636.93	-200.00	0.00	-1,883.93	130.20
4	APPROP	700000	10600	Visual Arts Fee Tier I	11100	11000	2019		2019	4	0.00	12.86	0.00	4,800.00	-4,812.86	0.00
5	APPROP	700000	10600	Visual Arts Fee Tier I	11100	11000	2019		2019	5	0.00	0.00	4,800.00	-4,800.00	0.00	0.00

Return to Criteria *Notes

After Release:

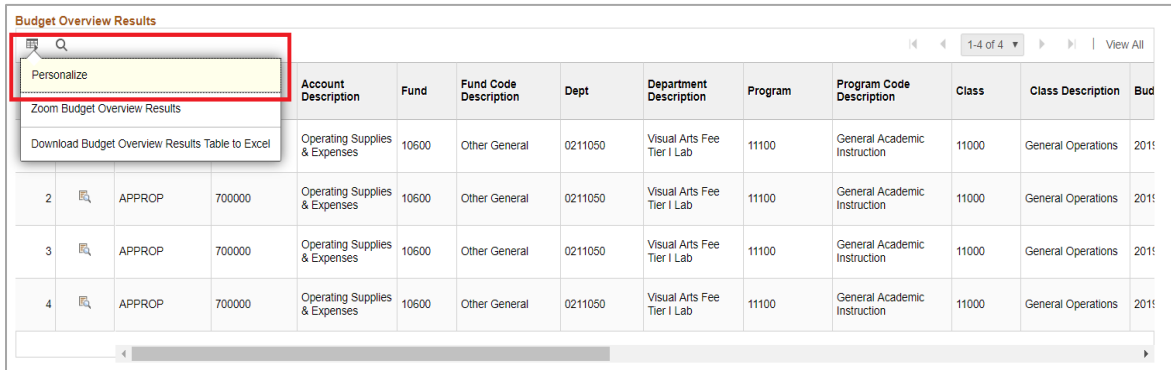
Budget Overview Results															1-4 of 4 View All	
	Ledger Group	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Program	Program Code Description	Class	Class Description	Bud				
1	APPROP	700000	Operating Supplies & Expenses	10600	Other General	0211050	Visual Arts Fee Tier I Lab	11100	General Academic Instruction	11000	General Operations	2011				
2	APPROP	700000	Operating Supplies & Expenses	10600	Other General	0211050	Visual Arts Fee Tier I Lab	11100	General Academic Instruction	11000	General Operations	2011				
3	APPROP	700000	Operating Supplies & Expenses	10600	Other General	0211050	Visual Arts Fee Tier I Lab	11100	General Academic Instruction	11000	General Operations	2011				
4	APPROP	700000	Operating Supplies & Expenses	10600	Other General	0211050	Visual Arts Fee Tier I Lab	11100	General Academic Instruction	11000	General Operations	2011				

Return to Criteria *Notes

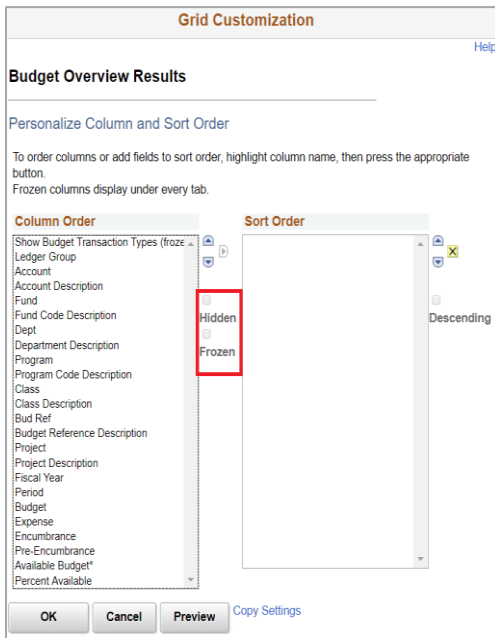
Functional Workaround:

Until this issue is resolved, there are two functional workarounds for this issue:

1. Users can customize grid options by selecting the Personalize button from the Grid Action Menu.



Then select which columns to hide or freeze when displaying the search results.



Click Preview to view how the results will appear or click OK to save grid customization selections.

2. Users can utilize the customized setting that ITS has made available.

Select the Personalize button from the Grid Action Menu.

Budget Overview Results

1-4 of 4 | View All

Personalize

Zoom Budget Overview Results

Download Budget Overview Results Table to Excel

	Account Description	Fund	Fund Code Description	Dept	Department Description	Program	Program Code Description	Class	Class Description	Bud
	Operating Supplies & Expenses	10600	Other General	0211050	Visual Arts Fee Tier I Lab	11100	General Academic Instruction	11000	General Operations	2015
2	Operating Supplies & Expenses	10600	Other General	0211050	Visual Arts Fee Tier I Lab	11100	General Academic Instruction	11000	General Operations	2015
3	Operating Supplies & Expenses	10600	Other General	0211050	Visual Arts Fee Tier I Lab	11100	General Academic Instruction	11000	General Operations	2015
4	Operating Supplies & Expenses	10600	Other General	0211050	Visual Arts Fee Tier I Lab	11100	General Academic Instruction	11000	General Operations	2015

Click Copy Settings to choose which shared customization setting you would like to copy.

Grid Customization

Budget Overview Results

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

- Show Budget Transaction Types (froz...
- Ledger Group
- Account
- Account Description
- Fund
- Fund Code Description
- Dept
- Department Description
- Program
- Program Code Description
- Class
- Class Description
- Bud Ref
- Budget Reference Description
- Project
- Project Description
- Fiscal Year
- Period
- Budget
- Expense
- Encumbrance
- Pre-Encumbrance
- Available Budget*
- Percent Available

Sort Order

Descending

OK Cancel Preview **Copy Settings** Share Settings Delete Settings

Click the magnifying glass to view the shared options.

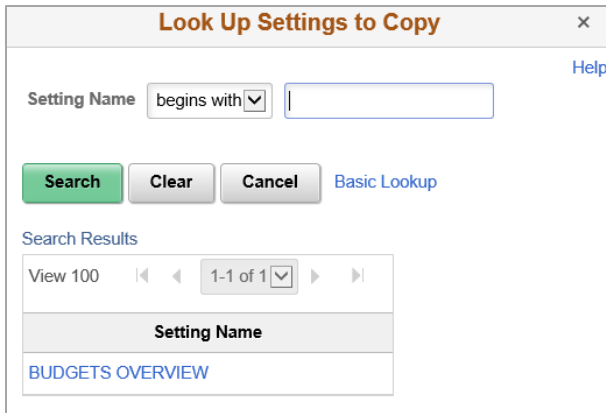
Copy Settings

Copy Your Customization Settings

Settings to Copy:

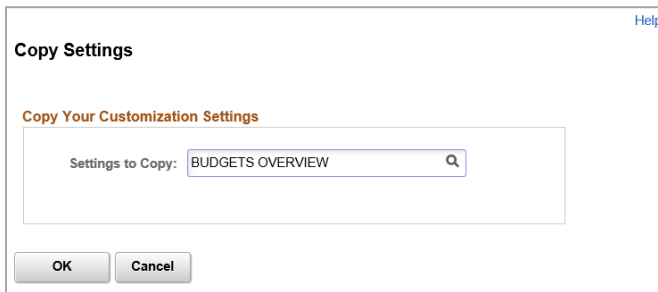
OK Cancel

Select the Budgets Overview setting name.



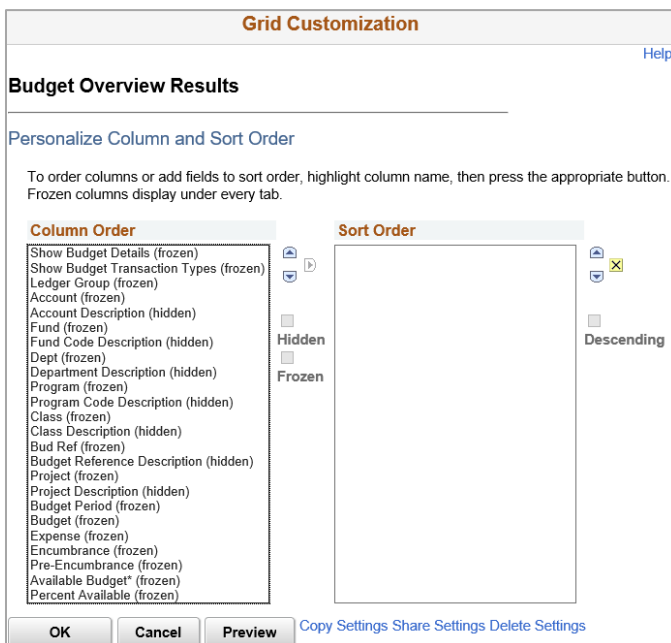
The dialog box is titled "Look Up Settings to Copy" and has a close button (X) in the top right corner. It contains a "Setting Name" field with a dropdown menu set to "begins with" and an empty text input field. Below the field are three buttons: "Search" (green), "Clear", and "Cancel". To the right of these buttons is a link for "Basic Lookup". Underneath is a "Search Results" section with a "View 100" label and a pagination control showing "1-1 of 1". A table below shows one result with the heading "Setting Name" and the value "BUDGETS OVERVIEW".

Click OK.



The dialog box is titled "Copy Settings" and has a "Help" link in the top right. It features a section titled "Copy Your Customization Settings" with a text input field labeled "Settings to Copy:" containing the text "BUDGETS OVERVIEW" and a search icon. At the bottom are "OK" and "Cancel" buttons.

The Budgets Overview customized setting will display and the user can change as needed.



The dialog box is titled "Grid Customization" and has a "Help" link in the top right. It is titled "Budget Overview Results" and has a "Personalize Column and Sort Order" section. Below this is a paragraph of instructions: "To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab." There are two main panels: "Column Order" on the left and "Sort Order" on the right. The "Column Order" panel has a list of fields with checkboxes for "Hidden" and "Frozen". The "Sort Order" panel has a "Descending" checkbox. At the bottom are "OK", "Cancel", and "Preview" buttons, along with links for "Copy Settings", "Share Settings", and "Delete Settings".

Estimated Resolution:

The cause of this issue is being investigated. We will update this Known Issue when a resolution has been determined.

MORE INFORMATION AND SUPPORT: For business impact emergency issues, contact the ITS Helpdesk immediately at 706-583-2001 or 1-888-875-3697 (toll free within Georgia). For non-urgent issues, contact the ITS Helpdesk via the self-service support website at http://www.usg.edu/customer_services. (This service requires a user ID and password. E-mail helpdesk@usg.edu to obtain self-service login credentials.)

ADDITIONAL RESOURCES: For information about ITS maintenance schedules or Service Level Guidelines, please visit http://www.usg.edu/customer_services/service_level_guidelines. For USG services status, please visit <http://status.usg.edu>.