What’s New in Image 39 Update?

Change #1: Expense Reports Approvals
New features and layout changes enhance the Expense Reports Approvals process. See below to view page enhancements and descriptions.

1. **Budget Status and Budget Options link** - Approver can view the Budget Status, manually run Budget Check, or see Budget Exception details. Previously, budget status and options displayed at bottom of page above action buttons.

2. **Created and Last Updated—New!** Displays name of employee who created and last updated the Expense Report, instead of Employee ID.

3. **Totals—New!** Section categorizes the different buckets of expenses. Shows what is due to employee vs. prepaids. The submitter sees this same data at the last step of submitting an Expense Report for review.

4. **Approval History—New!** Section includes both a list view of completed actions and a workflow lifecycle image showing the completed and pending workflow approval steps. Replaces the Pending Actions and Action History sections on the old page.

5. **Actions for Pending Approvals** - Buttons moved from bottom of page.

6. **Expense Details—New!** Link takes the approver to View Expense Report page to see all the expense and budget line details. Previously, Expense Details were only available as an Excel Download in the Grid Action menu of page.

Click here to access the PeopleSoft site for additional resources and training opportunities. Or follow this navigation path:

SDUSD > Staff Portal > Help Desk > Select PeopleSoft from the IT Resources drop down menu.

![Expense Reports Approvals](image-url)
What’s New in Image 39 Update?

Change #2: Budget Overview Run Control
Database enhancements require users to create a new run control for Budget Overview. **Important!** Create a new run control before launching the Budget Overview to avoid performance issues with report results by following the steps below.

1. Navigate to page:
   - Click **NavBar**.
   - Select **Navigator**.
   - Select **Commitment Control**.
   - Select **Review Budget Activities**.
   - Select **Budget Overview**.

On the **Budgets Overview** page:

2. Select **Add a New Value** tab.

3. Enter a name (run control) in **Inquiry Name**. For example - **Bud_Ov_NEW**
   **Note:** Do not use spaces or special characters. If needed, use an underscore ( _ ) to separate words.

4. Click **Add**.

On the **Budget Inquiry Criteria** page:

5. Finish setting up the budget criteria.

For detailed instructions on finishing the set up, please see the **How to Run the Budget Overview Job Aid**, found here.

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What’s New in Image 39 Update?

Change #3: Budget Overview Results
All fields on the Budget Overview Results are visible and in order to view complete row data, users must scroll horizontally. **Important!** Customize grid options to hide description fields by following the steps below.

Sample of the Budgets Overview Results

<table>
<thead>
<tr>
<th>Details</th>
<th>Budget Transaction Types</th>
<th>Ledger Group</th>
<th>Dept</th>
<th>Resource</th>
<th>ChartField Description</th>
<th>Budget Reference Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EXPENSE</td>
<td>0053</td>
<td>Adams Elementary</td>
<td>65000</td>
<td>Special Education NonPersonnel</td>
<td>00 No Budget Reference</td>
</tr>
<tr>
<td>2</td>
<td>EXPENSE</td>
<td>0053</td>
<td>Adams Elementary</td>
<td>65000</td>
<td>Special Education NonPersonnel</td>
<td>00 No Budget Reference</td>
</tr>
</tbody>
</table>

How to Hide Description Fields

On the Budget Overview Results page:

1. Select Personalize from Grid Option Menu.

2. Select each column to be hidden.
   Check Hidden toggle box.

3. Click OK.

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SDUSD > Staff Portal > Help Desk > Select PeopleSoft from the IT Resources drop down menu.