Updating "MY VIEWS" with new Budget Year

For this example, we would like to add budget year 2013 to an existing "My View".

Step 1 – Login to iStrategy (<u>https://frweb.usg.edu</u>) and Select the **My Views** button.

C ProClarity - Windows Internet Ex	plorer	
💽 🗸 🕷 https://frweb.usg.edu/p	as/en/src/proclarity.asp?uiConfig=&book=Favorites&page={C2F5BCC8-EE3D-4BDF-9ECF-B 💙 🔒	Yahoo! Search
File Edit View Favorites Tools He	elo	
👷 🕸 🚳 ProClarity	·	🟠 🔹 🔝 🔹 🖶 👻 📴 Page 🖬 🖏 🍈 Tools 🗸 🎽
Contents Navigation D	ata Layout View Sort Filter 🛩	ProClarity [™] analytics server
My Views » 🔶 🐣 Budget to Actuals - Exp	enditures By Acct - New name set (1)	3 3
Contents	Ibraries Ry Views	
How do I		Modified
Open a library?	Budget to Actuals - Revenues Jason test	4/15/2010 1:58:17 PM
Open a Briefing Book page?	Budget to Actuals - Revenues by Department	6/10/2010 3:18:52 PM
Sort libraries and books?	not in heirarchy accounts	6/14/2010 10:20:05 AM
Download Web Professional?	Budget to Actuals - Expenditures By Fund - jb hotfix testing	7/27/2010 5:01:55 PM
More help	Budget to Actuals - Expenditures By Dept - ITS	8/11/2010 2:21:11 PM
User: Support	Actuals - 98000 Agency fund for all departments	8/12/2010 2:53:09 PM
ProClarity: Standard 🗸	Budget to Actuals - Original Budget minus Amended Budget	9/2/2010 8:57:48 AM
Charle for Downloads	payroll - need to add dept, fiscal year, business unit	9/18/2010 9:37:12 PM 🗉
	Budget to Actuals - Expenditures By Dept - my view test	9/18/2010 9:53:12 PM
Overanize Multimus	position TEST	9/20/2010 2:16:07 PM
Organize my views	position TEST 2	9/20/2010 2:23:12 PM
🖆 Rename 🗡 Delete	ABAC Top 100 Vendors - 2010 and 2011	9/20/2010 3:29:48 PM
1 Create Folder	Macon Position Budgets by Department	9/20/2010 3:33:28 PM
Move to Folder	not in heirarchy - all institutions	9/24/2010 1:20:17 PM
	Not in heirarchy departments	9/24/2010 1:41:31 PM
	not in hierarchy	1/27/2011 2:01:35 PM
	Budget to Actuals - Expenditures By Fund - grid and chart	3/22/2011 1:16:32 PM
	Expenditures across budget years - Debbie March 22 2011	3/22/2011 2:20:56 PM
	Budget to Actuals - Expenditures By Fund - E & G only	3/24/2011 1:03:57 PM
	🔲 ៉ Jason test	3/24/2011 1:10:19 PM
ProClarity Version 6.3.2222.144 Copyright Information	Payroll draft report	4/4/2011 2:26:51 PM 🗸
Done		V Trusted sites

Step 2: Select the **Data Layout** tab. In the **background**, select **budget reference** and click the **edit** button.

C ProClarity - Windows Internet Explorer		
COO - 🔇 https://frweb.usg.edu/pas/en/src/proclarity.asp?uiConfig	ig=&book=Favorites&page={82FF8187-DBB0-41CF-A43E-A 🗹 🔒 🛃 🔀 🗙 Vahoo! Sear	rch 🖉 🔻
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp		
👷 🎄 🍕 ProClarity	🚹 • 🗟 • 🖶 •	• 🔂 <u>P</u> age • 🚳 🍈 T <u>o</u> ols • 🏾 »
Contents Navigation Data Layout View	Sort Filter 🖌	ProClarity analytics server
My Views » 🔶 🕆 Budget by Fund - All Institutions with Revenue_Exp slice	er 🌒	🕞 🎉 🖴 🏹 🙆
C Data Layout CApply	🙆 Account: Expenses 💌 Budget Reference: 2012 - 2012 💌	
How do I Arrange items on rows and columns? Swap rows and columns? Add members of a hierarchy? Create a drop-down menu (slicer)? More help Business Unit (Set: Leaf Descendants of All Bushes During Columns Fund (13 items) Measures (Budget)		
Background Account (2 items) Department Calendar Budget Project Budget Reference (Set: Last 7 Budget Reference Years) Calendar Fiscal Class Encumbrance Closed Status Program V	72000 - East Georgia College 14,624,612 73000 - Georgia Highlands College 26,190,534	1,659,033 1,113,600
Slice Combine		
	Trusted sit	es 🔍 100% 🔻 🛒

Step 3: **Expand** (+) **all budget refs** and select **2013** and then click the **add** button. Your screen should look like the screen below. Click **ok** to continue

🖉 https://frweb.usg.edu/?minWidth=660	&minHeight=400&cube=%2E%2E%2F%2E%2E%2Fcach 🔳 🗖 🔀
📮 Edit Hierarchy	۷
 Edit Hierarchy Hierarchy: Budget Reference Browse Search Shared Items Available items: Default (All Budget Refs (Share)) All Budget Refs (Share) 2000 - 2000 2001 - 2001 2002 - 2002 2003 - 2003 2004 - 2004 2005 - 2005 2006 - 2006 2007 - 2007 2008 - 2008 2009 - 2009 2010 - 2010 2011 - 2011 2012 - 2012 2013 - 2013 2014 - 2014 2015 - 2015 Unspecified Id Invalid Id Inactive Set: Current Budget Reference Version 	Show in view: Add Set: Last 7 Budget Reference Years 2013 - 2013 *4 Remove Add the selected item to 'Show in view:' *4 Remove All
Add Descendants	
	OK Cancel

C ProClarity - Windows Internet Explorer C The Edit Use Adupation Data Layout View Sort Filter* Pro Clarity Contents Itavigation Data Layout View Sort Filter* Pro Clarity Contents Itavigation Data Layout View Sort Filter* Pro Clarity Contents of All Business Units) Account: Expenses W Budget Reference: 2013 - 2013 (Contents of All Business Units) Account: Expenses W Budget Reference: 2013 - 2013 (Contents of All Business Units) Account: Expenses W Budget Reference: 2013 - 2013 (Contents of All Business Units) Account: Expenses W Budget Reference: 2013 - 2013 (Contents of All Business Units) Account: Expenses W Budget Reference: 2013 - 2013 (Contents of All Business Units) Account: Expenses W Budget Reference: 2013 - 2013 (Contents of All Business Units) Account: Expenses W Budget Reference: 2013 - 2013 (Contents of All Business Units) Business Unit (Set: Let Bedt) Business Unit (Set: Let Privit Courting Down menu (Sker)? More heb Business Unit (Set: Let Privit Courting Down menu (Sker)? More heb Business Unit (Set: Let Privit Courting Down menu (Sker)? More heb Business Unit (Set: Let Privit Courting Down menu (Sker)? More heb Business Unit (Set: Let Privit Courting Down menu (Sker)? More heb Business Unit (Set: Let Privit Courting Down menu (Sker)? More heb Business Unit (Set: Let Privit Courting Down menu (Sker)? Business Unit (Set: Let Privit Courting Down menu (Sker)? Business Unit (Set: Let Privit Courting Down menu (Sker)? Business Unit (Set: Let Privit) Business Uni	· · ·				
	🖉 ProClarity - Windows Internet Explor	er			
Ede Edit Yew Favorites Tools Help Image: Contents Ravigation Data Layout View Sort Filter - Pro Clarity Pro Clarity Image: Contents Ravigation Data Layout View Sort Filter - Pro Clarity Pro Clarity Image: Contents Ravigation Data Layout View Sort Filter - Pro Clarity Pro Clarity Image: Contents Ravigation Data Layout View Sort Filter - Pro Clarity Pro Clarity Image: Contents Ravigation: Ravigation: Account: Expenses Budget Reference: 2013 - 2013 2006 - 2006 2007 - 2007 2006 - 2006 2007 - 2007 2006 - 2006 2007 - 2007 2008 - 2008 2009 - 2009 2009 - 2009 2009 - 2009 2009 - 2009 2009 - 2008 2009 - 2008 2009 - 2008 2009 - 2008 2009 - 2008 2009 - 2008 2009 - 2008 2009 - 2008 2009 - 2010 2011 - 2011 2011 - 2011 2013 - 2013 Edit: Image: Contents	🕥 🗸 🍕 https://frweb.usg.edu/pas/er	n/src/proclarity.asp?uiConfig=&book=Favorites&pag	e={82FF8187-DBB0-41CF-A43E-A 💙 🔒	Yahoo! Search	P -
Proclarity Contents Havigation Data Layout View Sort Filter * ProClarity indeplies sort ProClarity indeplies sor	<u>Fi</u> le <u>E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp				
Contents Navigation Data Layout View Sort Filter ProClarity Print Print Proclarity Proclarity <td>🔶 🏟 餐 ProClarity</td> <td></td> <td></td> <td>🟠 🔹 🔝 🔹 🍓 🔹 🔂 <u>P</u>age 🔹 .</td> <td>🚳 🌍 T<u>o</u>ols 🔹 🎽</td>	🔶 🏟 餐 ProClarity			🟠 🔹 🔝 🔹 🍓 🔹 🔂 <u>P</u> age 🔹 .	🚳 🌍 T <u>o</u> ols 🔹 🎽
Contents Havigation Data Layout View Sort Filter ProClarty analytics sort My Views C Budgetby Fund - Al Institutions with Revenue Exp skorg = Budget for Expenses, 2013 - 2013 (Leaf Descendants of Al Business Units) Account: Expenses Data Layout Account: Expenses Data Layout Account: Expenses Budget Reference: 2013 - 2013 (Mathematications units Revenue Exp skorg = Budget Reference: 2007 - 2006 2007 - 2007 2000 - 2008 2009 - 2008 2009 - 2008 2009 - 2009 2011 - 2011 2012 - 2012 2013 - 2013 2013 - 2013 2013 - 2013 2013 - 2013 2013 - 2013 2009 - 2008 2009 - 2008 2009 - 2008 2009 - 2008 2010 - 2010 2012 - 2012 2013 - 2013 2014 - 2016 201					
My Verses * * @ Budget by Fund - Al Institutions with Revenue Exp slicer #Budget for Expenses, 2013 - 2013 (eaf Descendants of All Business Units) * * Data Layout @ Common * • Arrande items on rows and columns? • Arrande items on rows and columns? • Add members of a hierarchy? Create a droc-down menu (slicer)? • More help * ************************************	Contents Navigation Data	Layout View Sort Filter 🖌		ProClarit	analytics server
Count: Expenses Budget Reference: 2006 - 2006 2006 - 2007 2008 - 2007 2008 - 2007 2008 - 2007 2008 - 2007 2008 - 2008 2009 - 2009 2010 - 2010 2010 - 2010 2010 - 2010 2010 - 2010 2010 - 2010 2011 - 2011 2012 - 2012 2013 - 2013	Wy Views » ↔ ↔ Budget by Fund - All Instituti	ions with Revenue Exp slicer »Budget for Expenses,	2013 - 2013 (Leaf Descendants of All Busine	ess Units) 🛈	₽ ₽ % @
Background Account (2 items) Department Calendar Budget Project	Data Layout Arance items on rows and columns? Swap rows and columns? Add members of a hierarchy? Create a drop-down menu (slicer)? More help More help Columns Fund (13 tems) Measures (Budget) More help.	Account: Expenses V Budget Reference:	2013 - 2013 ♥ 2006 - 2006 2007 - 2007 2008 - 2009 2010 - 2010 2011 - 2011 2012 - 2012 2013 - 2013		
Calendar Fiscal Class Encumbrance Closed Status	Background Account (2 items) Department Calendar Budget Project Budget Reference (2 items) Calendar Fiscal Class Encumbrance Closed Status v				Ð

Step 4: When the report displays, select the **budget reference slicer** and select **2013**.

Step 5: Save the report as a new "my view" by selecting the floppy disk icon (circled above).

Note – you can overwrite the existing report if you would like.

🖉 https://frweb.usg.edu/?caption=Budget%20by%20Fund 🔳 🗖	×
🐨 Save to My Views	
Page Name:	
Budget by Fund - All Institutions with Revenue_Exp slicer	
Save In:	_
My Views	*
Save Cancel	I



The updated report will be saved in your "my views".

C ProClarity - Windows Internet Ex	plorer	
😋 🕤 👻 🔇 https://frweb.usg.edu/p	as/en/src/proclarity.asp?uiConfig=8book=Favorites8page={82FF8187-DBB0-41CF-A43E-A 🔽 🧯	Yahoo! Search
File Edit View Favorites Tools H	elp	
🚖 🏟 🚳 ProClarity		🖄 🔹 🗟 🔹 🖶 🔹 🕞 Page 🔹 🖄 🎯 Tools 🗸 🎽
Contents Navigation D	ata Layout View Sort Filter	ProClarity analytics server
My Views		3
Contents	III Libraries R My Views	
How do I	Name	Modified
Open a library?		
Open a Briefing Book page?	ARAC Tep 100 Venders 2010 and 2011	9/20/2010 2:23:12 PM
Sort libraries and books?	Macon Position Rudgets by Denartment	9/20/2010 3.29.46 PM
Download Web Professional?	not in heirarchy - all institutions	9/20/2010 3.33.20 PM
<u>More help</u>		9/24/2010 1:41:31 PM
User: Support		1/27/2011 2:01:35 PM
ProClarity: Standard 🗸	Budget to Actuals - Expenditures By Fund - grid and chart	3/22/2011 1:16:32 PM
Charle for Developed	Expenditures across budget years - Debbie March 22 2011	3/22/2011 2:20:56 PM
	Budget to Actuals - Expenditures By Fund - E & G only	3/24/2011 1:03:57 PM
	Diason test	3/24/2011 1:10:19 PM
	Payroll draft report	4/4/2011 2:26:51 PM
	Budget to Actuals - Expenditures By Acct Debbie Test April 5	4/5/2011 10:51:17 AM
	Approp Status for Darton	4/13/2011 9:23:58 AM
	VSU Budget Progress - Budget to Actuals Jason TEST	7/1/2011 9:32:40 AM
	not in hierarchy depts	7/12/2011 2:47:08 PM
	Budget to Actuals - Expenditures By Acct	7/25/2011 4:02:54 PM
	sodexo - 2011 spend	8/2/2011 4:09:28 PM
	Revenues - Expenditures	8/9/2011 1:56:04 PM
	Georgia Highlands - Exp by Dept and Acct	9/13/2011 9:48:12 AM
Conflarity Version 6.3.2222.144	Budget to Actuals - Expenditures By Acct - New name set	11/11/2011 10:37:22 AM
Copyright Information	Budget by Fund - All Institutions with Revenue Exp slicer	4/9/2012 3:11:50 PM
Copyright Internation		

Should you need any additional assistance updating iStrategy "My Views" please put in a ticket to the ITS Helpdesk (helpdesk@usg.edu, 706-583-2001). ITS will be happy to assist all users to update their "My Views".