

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 (<https://frweb.usg.edu>) and Select the **My Views** button.

The screenshot shows the ProClarity web application interface. The browser window title is "ProClarity - Windows Internet Explorer". The address bar shows the URL: <https://frweb.usg.edu/pas/en/src/proclarity.asp?uiConfig=&book=Favorites&page={C2F5BCC8-EE3D-4BDF-9ECF-B...}>. The page title is "ProClarity analytics server".

The main navigation menu includes: Contents, Navigation, Data Layout, View, Sort, Filter. The current view is "My Views > Budget to Actuals - Expenditures By Acct - New name set".

The "My Views" section is circled in red. It contains a list of views with the following columns: Name and Modified.

Name	Modified
<input type="checkbox"/> Budget to Actuals - Revenues Jason test	4/15/2010 1:58:17 PM
<input type="checkbox"/> Budget to Actuals - Revenues by Department	6/10/2010 3:18:52 PM
<input type="checkbox"/> not in heirarchy accounts	6/14/2010 10:20:05 AM
<input type="checkbox"/> Budget to Actuals - Expenditures By Fund - jb hotfix testing	7/27/2010 5:01:55 PM
<input type="checkbox"/> Budget to Actuals - Expenditures By Dept - ITS	8/11/2010 2:21:11 PM
<input type="checkbox"/> Actuals - 98000 Agency fund for all departments	8/12/2010 2:53:09 PM
<input type="checkbox"/> Budget to Actuals - Original Budget minus Amended Budget	9/2/2010 8:57:48 AM
<input type="checkbox"/> payroll - need to add dept, fiscal year, business unit	9/18/2010 9:37:12 PM
<input type="checkbox"/> Budget to Actuals - Expenditures By Dept - my view test	9/18/2010 9:53:12 PM
<input type="checkbox"/> position TEST	9/20/2010 2:16:07 PM
<input type="checkbox"/> position TEST 2	9/20/2010 2:23:12 PM
<input type="checkbox"/> ABAC Top 100 Vendors - 2010 and 2011	9/20/2010 3:29:48 PM
<input type="checkbox"/> Macon Position Budgets by Department	9/20/2010 3:33:28 PM
<input type="checkbox"/> not in heirarchy - all institutions	9/24/2010 1:20:17 PM
<input type="checkbox"/> Not in heirarchy departments	9/24/2010 1:41:31 PM
<input type="checkbox"/> not in heirarchy	1/27/2011 2:01:35 PM
<input type="checkbox"/> Budget to Actuals - Expenditures By Fund - grid and chart	3/22/2011 1:16:32 PM
<input type="checkbox"/> Expenditures across budget years - Debbie March 22 2011	3/22/2011 2:20:56 PM
<input type="checkbox"/> Budget to Actuals - Expenditures By Fund - E & G only	3/24/2011 1:03:57 PM
<input type="checkbox"/> Jason test	3/24/2011 1:10:19 PM
<input type="checkbox"/> Payroll draft report	4/4/2011 2:26:51 PM

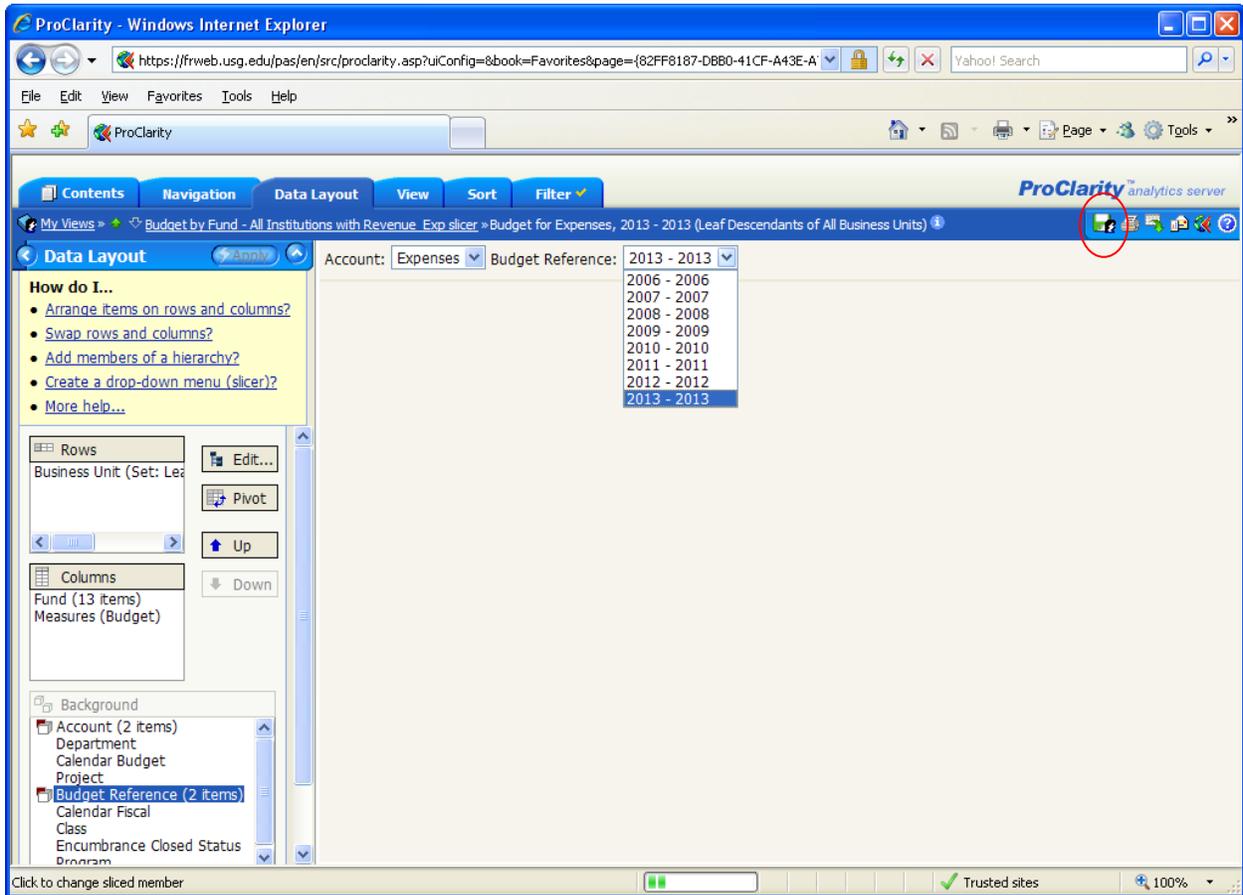
The sidebar on the left includes "How do I..." with links like "Open a library?", "Open a Briefing Book page?", "Sort libraries and books?", "Download Web Professional?", and "More help...". It also shows "User: Support", "ProClarity: Standard", and "Check for Downloads". The "Organize My Views" section has buttons for "Rename", "Delete", "Create Folder", and "Move to Folder...".

At the bottom left, it says "ProClarity Version 6.3.2222.144 Copyright Information". At the bottom right, it says "Done", "Trusted sites", and "100%".

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

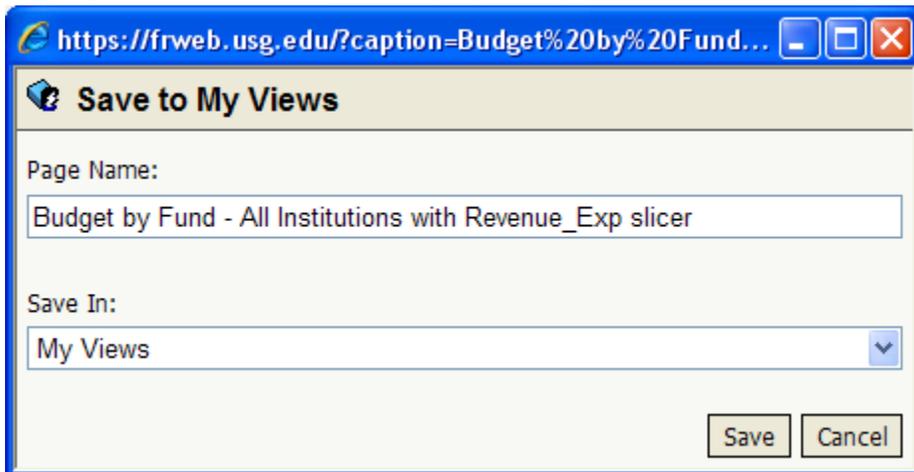
The screenshot shows the ProClarity software interface in a Windows Internet Explorer browser window. The browser address bar shows the URL: <https://frweb.usg.edu/pas/en/src/proclarity.asp?uiConfig=&book=Favorites&page={82FF8187-DBB0-41CF-A43E-A>. The browser menu includes File, Edit, View, Favorites, Tools, and Help. The ProClarity interface has a top navigation bar with tabs: Contents, Navigation, Data Layout (highlighted with a red circle), View, Sort, and Filter. Below the navigation bar, the current view is "Budget by Fund - All Institutions with Revenue_Exp slicer". The "Data Layout" section shows "Account: Expenses" and "Budget Reference: 2012 - 2012". A sidebar on the left contains a "How do I..." section with links like "Arrange items on rows and columns?", "Swap rows and columns?", "Add members of a hierarchy?", "Create a drop-down menu (slicer)?", and "More help...". Below this is a "Business Unit (Set: Leaf Descendants of All Buses)" section with an "Edit..." button (circled in red), "Pivot", "Up", and "Down" buttons. The "Columns" section lists "Fund (13 items)" and "Measures (Budget)". The "Background" section lists "Account (2 items)", "Department", "Calendar Budget", "Project", "Budget Reference (Set: Last 7 Budget Reference Years)", "Calendar Fiscal", "Class", "Encumbrance Closed Status", and "Program". At the bottom, there are "Slice" and "Combine" buttons. The main data area shows a table with two rows: "72000 - East Georgia College" and "73000 - Georgia Highlands College", with columns for values. The browser status bar at the bottom shows "Trusted sites" and "100%".

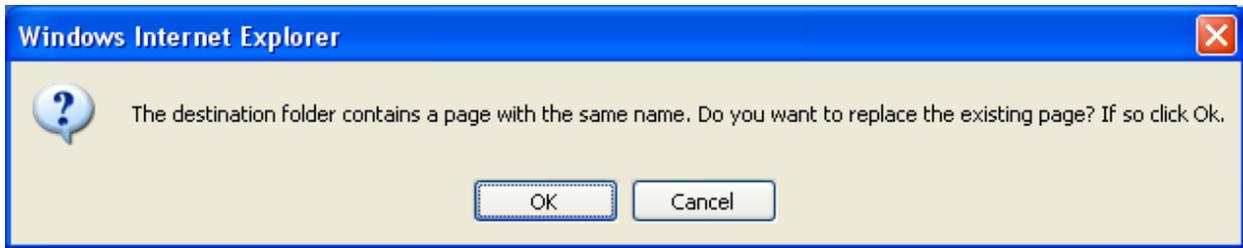
Step 4: When the report displays, select the **budget reference slicer** and select **2013**.



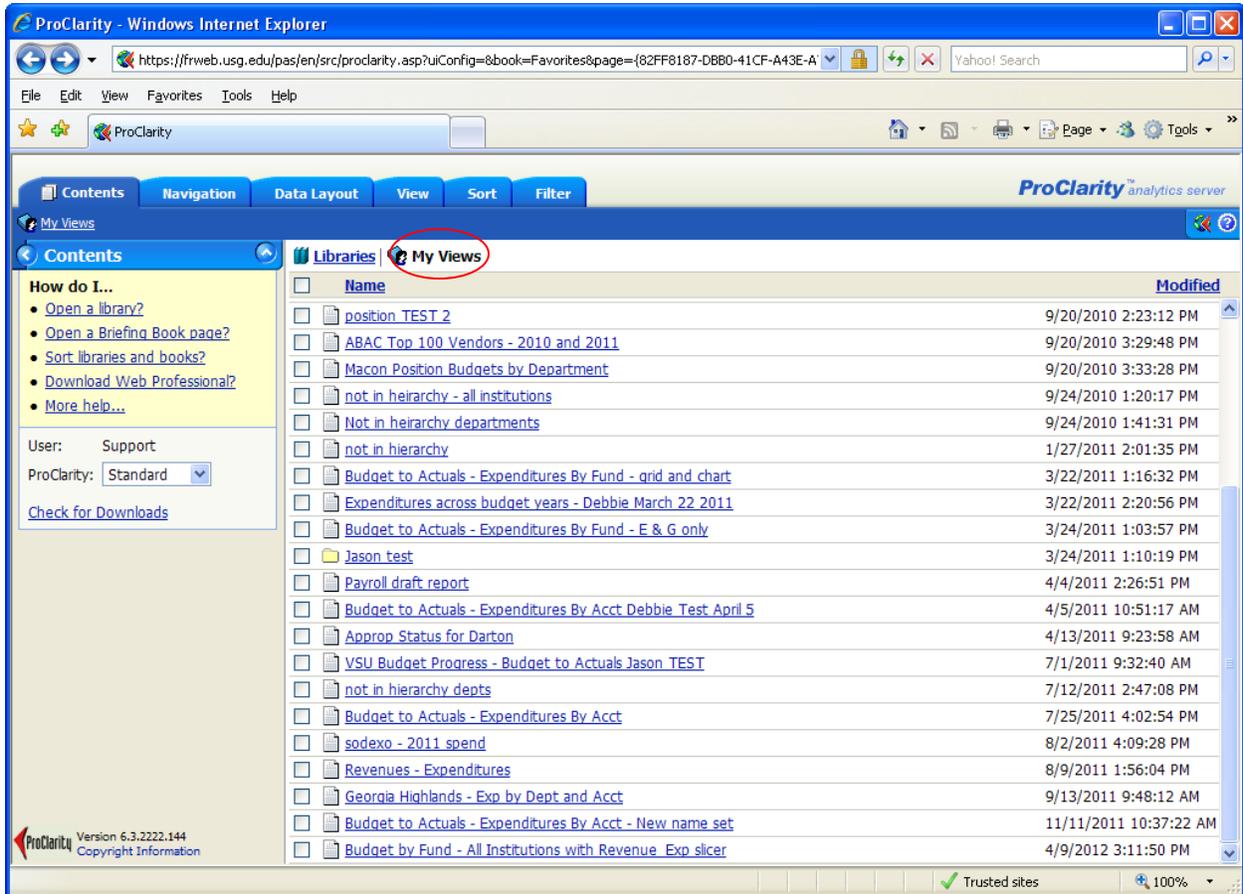
Step 5: Save the report as a new "my view" by selecting the floppy disk icon (circled above).

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





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



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".