

# Helpful Hint #4: Customization and Setting a Default Customization (display)

Saved customizations allow users to save and view later dashboard pages in their current state with their most frequently used items such as filters and column sorts. By saving customizations, users need not make these choices manually each time that they access the dashboard page. To use the Customization Feature, first set up the dashboard page the way you want to view it. Put in your selections, click apply, edit display (include/exclude columns, move columns, add subtotals, etc.). Next save the customization and apply the customization at any time. You can also set the customization to be your default display each time you go into that dashboard page.

## How to use the customization feature:

1. First choose the dashboard, we will use Account Summary>Account Summary for this example. Below is the default display when the dashboard page is opened.

The screenshot shows the 'Account Summary' dashboard with the following filters: Account begins with 000000, Fiscal Year 16-17, Campus (dropdown), Cost Center Month Desc (dropdown), Sub Fund Group (dropdown), and Reporting Levels 1-5 (dropdowns). Below the filters, there are two 'No Results' messages. The first message states: 'No Results. The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.' It lists the filters: 'Account begins with 000000 and Fiscal Year is equal to 16-17'. The second message states: 'No Results. The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.' It lists the filters: 'Fiscal Year is equal to 16-17 and Account begins with 000000'. Both messages include an 'Analyze - Refresh' button.

2. Input your selections, click apply. For this example we used account 096235, fiscal year 12-13, and campus Alfred State.

The screenshot shows the 'Account Summary' dashboard with the following filters: Account begins with 096235, Fiscal Year 12-13, Campus Alfred State, Cost Center Month Desc (dropdown), Sub Fund Group (dropdown), and Reporting Levels 1-5 (dropdowns). Below the filters, there is a table of accounts:

Account	Account Local Desc	Cost Center	Account Manager
096235-01	D229PE-INSTALL SAT BOILERS-PH II	28-435352-74-12	
096235-02	D229PG-DES-GEN REHAB-SHALTS	28-435352-74-12	
096235-03	D229PH-CRITICAL MAINT-MACKENZIE	28-435352-74-12	
096235-04	D229PI-INFRASTRUCTURE UPGRADES	28-435352-74-12	
096235-05	D229PG-GENERAL REHAB SHALTS	28-435352-74-12	
096235-06	D229FU-R/C DOOR REPLACEMENT	28-435352-74-12	
096235-07	D229GB-MACK-PHASE I-IT EQUIPMENT	28-435352-74-12	
096235-99	REHAB 1213 APPROX	28-435352-74-12	

Below the table, there are buttons for 'Analyze - Refresh - Print - Export' and a 'Select View: Summary by Major Object' dropdown. At the bottom, there is a summary table:

Charge Agency Name (Major Object)	Originating Agency	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
<b>Grand Total</b>		3,250,000.00	2,750,000.00	0.00	64,973.45	0.00	435,026.55	86.6
<b>Alfred State Total</b>		3,250,000.00	2,750,000.00	0.00	64,973.45	0.00	435,026.55	86.6
Alfred State	OTPS Alfred State	3,250,000.00	2,750,000.00	0.00	64,973.45	0.00	435,026.55	86.6

At the bottom, there is a message: 'Charge Agency Name is equal to Alfred State and Fiscal Year is equal to 12-13 and Account begins with 096235'.

- Edit the display (include/exclude columns, move columns, add subtotals, etc.). For this example we included the account number and account description and excluded the originating agency.

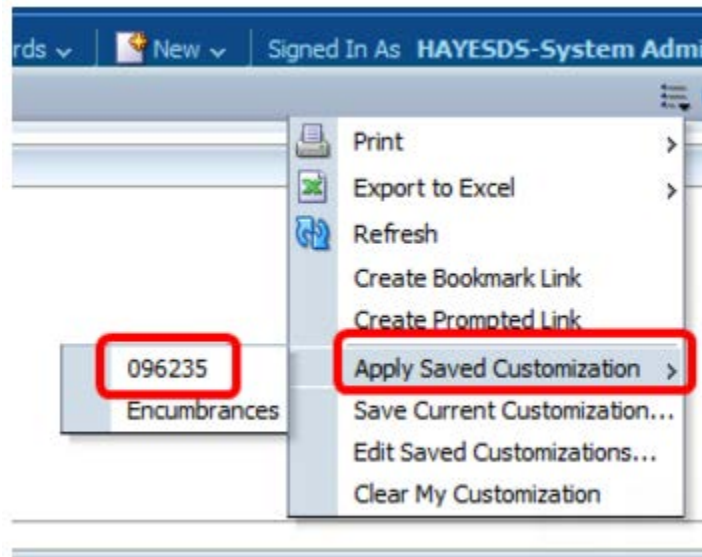
Charge Agency Name	Account	Account Local Desc	Major Object	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
<b>Grand Total</b>				<b>3,250,000.00</b>	<b>2,750,000.00</b>	<b>0.00</b>	<b>64,973.45</b>	<b>0.00</b>	<b>435,026.55</b>	<b>86.6</b>
<b>Alfred State Total</b>				<b>3,250,000.00</b>	<b>2,750,000.00</b>	<b>0.00</b>	<b>64,973.45</b>	<b>0.00</b>	<b>435,026.55</b>	<b>86.6</b>
Alfred State	096235-01	D229FE-INSTALL SAT BOILERS-PH II	OTPS	1,786,788.00	1,786,788.00	0.00	0.00	0.00	0.00	100.0
	096235-02	D229FG-DES-GEN REHAB-SHULTS	OTPS	91,187.00	91,187.00	0.00	0.00	0.00	0.00	100.0
	096235-03	D229FH-CRITICAL MAINT-MACKENZIE	OTPS	31,078.00	31,078.00	0.00	0.00	0.00	0.00	100.0
	096235-04	D229FI-INFRASTRUCTURE UPGRADES	OTPS	50,000.00	50,000.00	0.00	0.00	0.00	0.00	100.0
	096235-05	D229FG-GENERAL REHAB SHULTS	OTPS	767,801.00	767,801.00	0.00	0.00	0.00	0.00	100.0
	096235-06	D229FU-R/C DOOR REPLACEMENT	OTPS	23,146.00	23,146.00	0.00	0.00	0.00	0.00	100.0
	096235-07	D229GB-MACK-PHASE I-IT EQUIPMENT	OTPS	325,000.00	0.00	0.00	64,973.45	0.00	260,026.55	20.0
	096235-99	REHAB 1213 APPROP	OTPS	175,000.00	0.00	0.00	0.00	0.00	175,000.00	0.0

Charge Agency Name is equal to **Alfred State**  
 and Fiscal Year is equal to **12-13**  
 and Account begins with **096235**

- To save the current display, click on the three lines in the upper right hand corner of your screen under your user id. A menu appears, click on Save Current Customization. A pop up box appears, type in a name for your customization. For this example I will use the account number as the name of my customization.

The screenshot shows a web application interface. At the top, there is a search bar with 'All' selected, and navigation links for 'Advanced', 'Help', and 'Sign Out'. Below this is a breadcrumb trail: 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', and 'Signed In As HAYESDS-System Admin'. A red box highlights a menu icon in the top right corner. A context menu is open, listing options like 'Print', 'Export to Excel', 'Refresh', 'Create Bookmark Link', 'Create Prompted Link', 'Apply Saved Customization', 'Save Current Customization...', 'Edit Saved Customizations...', and 'Clear My Customization'. The 'Save Current Customization...' option is highlighted with a red box. A dialog box titled 'Save Current Customization' is open, with the 'Name' field containing '096235'. The 'Save for' section has 'Me' selected with a radio button, and 'Others' is unselected. There is a 'Set Permissions' button next to 'Others'. The 'Make this my default for this page' checkbox is unchecked. At the bottom of the dialog are 'Help', 'OK', and 'Cancel' buttons.

- Next time you are on this dashboard page and you want to do the same query, in the upper right hand corner of your screen, click on the three lines below your user id. Hover over Apply Saved Customization, a menu of your customizations will appear, click on the one you want the dashboard to display.



- The preset display you customized will display.

Account Summary

Introduction Account Summary Multiple Accounts Summary Payroll Search Open PO's Actual Alloc/Exp/Enc Pending Alloc/Exp/Enc All Alloc/Exp/Enc

Selections

Account begins with: 096235 Fiscal Year: 12-13

Campus: Alfred State Cost Center Month Desc: --Select Value-- Sub Fund Group: --Select Value--

Reporting Level 1: --Select Value-- Reporting Level 2: --Select Value-- Reporting Level 3: --Select Value-- Reporting Level 4: --Select Value-- Reporting Level 5: --Select Value--

Apply Reset

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Account Summary

Account	Account Local Desc	Cost Center	Account Manager
096235-01	D229FE-INSTALL SAT BOILERS-PH II	28-435352-74-12	
096235-02	D229FG-OES-GEN REHAB-SHLT5	28-435352-74-12	
096235-03	D229FH-CRITICAL MAINT-MACKENZIE	28-435352-74-12	
096235-04	D229FI-INFRASTRUCTURE UPGRADES	28-435352-74-12	
096235-05	D229FG-GENERAL REHAB-SHLT5	28-435352-74-12	
096235-06	D229FU-R/C DOOR REPLACEMENT	28-435352-74-12	
096235-07	D229GB-MACK-PHASE I-IT EQUIPMENT	28-435352-74-12	
096235-99	REHAB 1213 APPROP	28-435352-74-12	

Analyze Refresh Print Export

Select View: Summary by Major Object

Charge Agency Name	Account	Account Local Desc	Major Object	Allocation Total	Expenditure Total	Pending Expenditure	Encumbrance Total	Pending Encumbrance	Available Balance	% Used
<b>Grand Total</b>				<b>3,250,000.00</b>	<b>2,750,000.00</b>	<b>0.00</b>	<b>64,973.45</b>	<b>0.00</b>	<b>435,026.55</b>	<b>86.6</b>
<b>Alfred State Total</b>				<b>3,250,000.00</b>	<b>2,750,000.00</b>	<b>0.00</b>	<b>64,973.45</b>	<b>0.00</b>	<b>435,026.55</b>	<b>86.6</b>
Alfred State	096235-01	D229FE-INSTALL SAT BOILERS-PH II	OTPS	1,786,788.00	1,786,788.00	0.00	0.00	0.00	0.00	100.0
	096235-02	D229FG-OES-GEN REHAB-SHLT5	OTPS	91,187.00	91,187.00	0.00	0.00	0.00	0.00	100.0
	096235-03	D229FH-CRITICAL MAINT-MACKENZIE	OTPS	31,078.00	31,078.00	0.00	0.00	0.00	0.00	100.0
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	096235-05	D229FG-GENERAL REHAB-SHLT5	OTPS	767,801.00	767,801.00	0.00	0.00	0.00	0.00	100.0
	096235-06	D229FU-R/C DOOR REPLACEMENT	OTPS	23,146.00	23,146.00	0.00	0.00	0.00	0.00	100.0
	096235-07	D229GB-MACK-PHASE I-IT EQUIPMENT	OTPS	325,000.00	0.00	0.00	64,973.45	0.00	260,026.55	20.0
	096235-99	REHAB 1213 APPROP	OTPS	175,000.00	0.00	0.00	0.00	0.00	175,000.00	0.0

Charge Agency Name is equal to Alfred State  
and Fiscal Year is equal to 12-13  
and Account begins with 096235

