

GLEZ Newsletter - May 2020

As a member of the GLEZ user community, you are receiving this newsletter to keep you up-to-date with the progress of the redesigned GLEZ tool coming this summer.

What is in this edition?

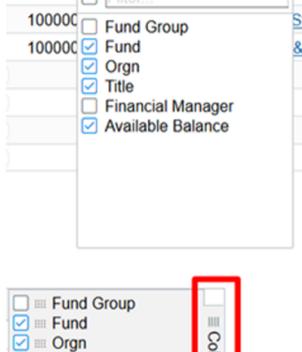
- Personalizing Reports
- My Favorite Funds
- My Views
- Customizing Table Layout

Personalize Reports

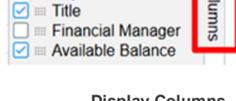
Multiple options to configure data within a report

Display Columns - There are two options to display columns.

- Click on the three horizontal lines next to the *Column* Heading. Then click on the three vertical lines to select additional columns you want to display in the grid.



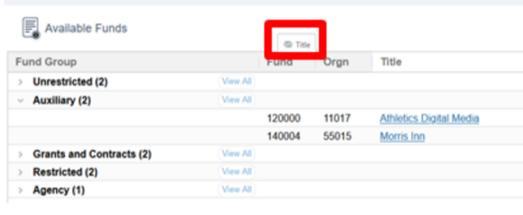
- Click on *Columns* to the right of the grid to display a list of available columns you want to display in the grid.



Display Columns

Move Columns

Click and hold the column header and drag in order to move the column to a new position.



Move Columns

Sort Columns

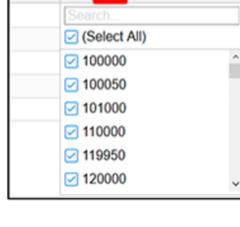
Click the column header to sort the grid ascending or descending. An *arrow icon* will indicate which column the grid is sorted by. You can sort multiple columns by clicking each in your preferred order.



Sort Columns

Column Filter

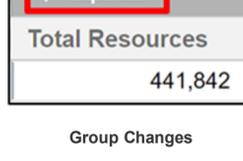
Next to the Column heading, click on the three vertical lines and select the *filter* button. Check/uncheck which data to display.



Column Filter

Group Changes

Similar to adding/removing columns, you can show/hide column groups by clicking *Expand/Collapse*.



Group Changes

My Favorite Funds

Tag your favorite fund/orgs to quickly view a list on your account summary page

How do I create a Favorite?

- On the *Account Balance* page for the specific fund/org, click ♥ to *Add to Favorites*.

Where do I access My Favorites? (Two ways)

- Click *My Favorite Funds* tab on the Home page
- Click the ♥ icon to review your list



My Views

Customize your view with elements like fund totals, account budget to actuals or a list of transactions for a specific fund, group of funds or any other FOAPAL element.

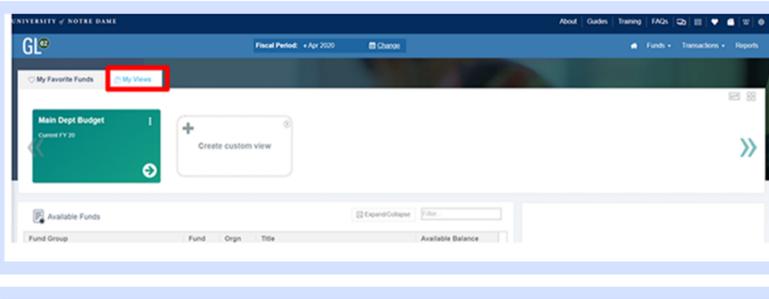
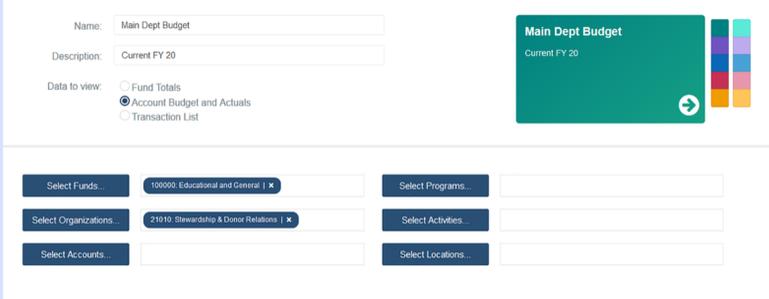
How do I create a custom view?

Click *My Views* and then click + to create your custom view.

- *Name* the view
- Provide a *Description*
- Select *data to view*: Fund Totals, Account Budget and Actuals or Transaction List
- Select a *color scheme* for the custom view card
- Select *FOAPAL elements*: Funds, Organizations, Accounts, Programs, Activities or Locations
- Click *Save*

How do I access My Views?

- On the Home Page click *My Views* then click → to open the report.



Group	Title	FY Budget	Current Month	Year to Date	Encumbrances	Budget Remaining
- Resources		1,651,062.71	0.00	1,651,062.71	0.00	0.00
-> Unrestricted Alloc.		1,651,062.71	0.00	1,651,062.71	0.00	0.00
-> Expenses		1,651,062.71	71,616.36	1,269,567.10	303,345.65	58,118.95
-> Labor		1,416,838.11	70,445.50	1,122,108.84	299,022.95	-1,922.79
-> Non-Labor		231,224.60	1,170.86	167,458.26	3,724.60	60,011.74

How do I edit my views?

Click on the *three dots* in the upper right corner to remove, edit, or view details on the saved view.

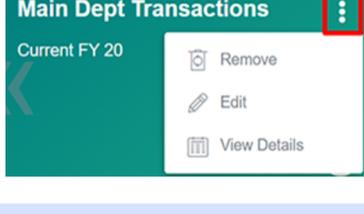
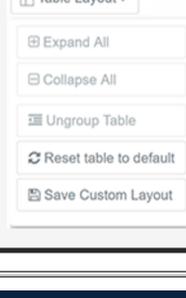


Table Layout

Customize Table Views to display the data you want to see

- **Expand All** - Displays all rows in a table
- **Collapse All** - Condense rows into a summary
- **Ungroup Table** - Remove all row groups (Acct Group, Acct Class)
- **Reset Table Layout** - Return the table to its original default layout
- **Save Custom Layout** - Save your layout for future viewing



For more information email control@nd.edu or phone GLEZ Help 631-8000
[Glez Project Website](http://GlezProject.com)

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