

# MUX Filters and Views

A View is a framework that determines how information displays on a page. Views include Grids, Timelines and Boards, Filters and Widgets. Views are one of the Common Components in Clarity.

## Oakland County Views

Clarity has Common Components – a grouping of attributes, filters and formats that make up the look of modules, i.e., Ideas, Projects, Tasks, Risks, Issues, etc.

### Grid View Options



To make changes using QRG - Common Components

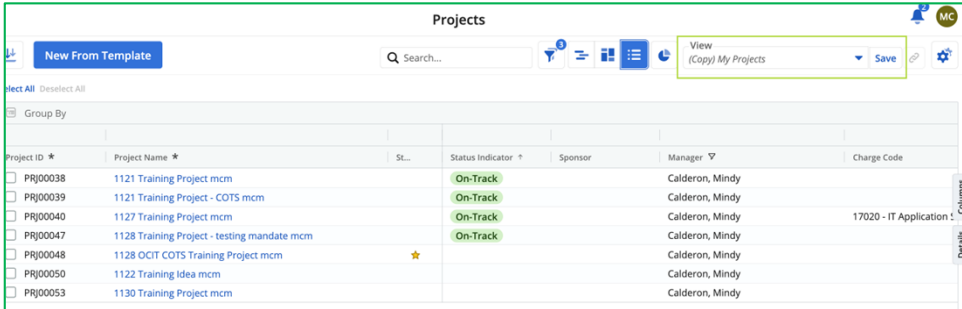
#### 1. To set Grid View Options

- Click **View Options**
- Select the periods that should be displayed (Months, Quarters, and Years). In Clarity, you can view all the periods that have been defined by your administrator in the fiscal calendar. Many administrators do not define fiscal weeks and hence this information is not available in Clarity.
- Select **Start / End Periods**
- Select Totals
  - **Sum of Periods** totals between the Start / End Periods
  - **Grand Totals** totals between the Start / Finish of the project
- Select **Per-Period Metrics** to sum and total
  - The order in which you select will set the order in the grid
- Set **Decimal Display** for numbers and money
- **Wrap Text** wraps the text within the columns
- Once selected, the columns display on the right-hand side of the grid
- Click **Close**

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When a View changes, the View name is Italicized' and Save button to the right of the View is enabled. Any changes to the Grid and Board (including Filters) are saved in a single View.

In the example below, the layout was changed from the Board to the Grid so the view name italicized and the Save button is enabled.



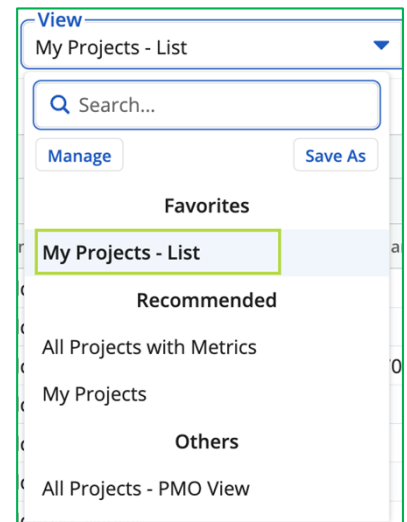
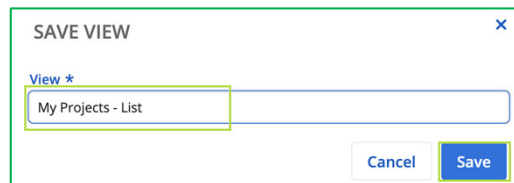
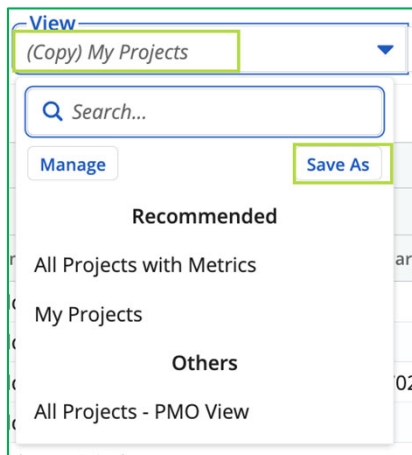
| Project ID * | Project Name *                              | Status Indicator ↑ | Sponsor | Manager ▾       | Charge Code            |
|--------------|---|--------------------|---------|-----------------|------------------------|
| PRJ00038     | 1121 Training Project mcm                   | On-Track           |         | Calderon, Mindy |                        |
| PRJ00039     | 1121 Training Project - COTS mcm            | On-Track           |         | Calderon, Mindy |                        |
| PRJ00040     | 1122 Training Project mcm                   | On-Track           |         | Calderon, Mindy | 17020 - IT Application |
| PRJ00047     | 1128 Training Project - testing mandate mcm | On-Track           |         | Calderon, Mindy |                        |
| PRJ00048     | 1128 OCIT COTS Training Project mcm         |                    |         | Calderon, Mindy |                        |
| PRJ00050     | 1122 Training Idea mcm                      |                    |         | Calderon, Mindy |                        |
| PRJ00053     | 1130 Training Project mcm                   |                    |         | Calderon, Mindy |                        |



If this were a View that you originally created and you wanted to Save it with the same name, use the **Save** button

## Save Views

- To save a View
  - Click the drop-down arrow to the right of the View name
  - Click **Save as**
  - Type the Name
  - Click **Save**
    - The View is Saved and displays in the View as well as in the Favorites section of the Views



# MUX Filters and Views

## Manage Views

There is no limit to the number of Views. Once Views are Saved, you can rename Views you created, view other's views and make them your 'Favorites'.

- To **Switch** to a different View
  - Click the View drop-down arrow to the right of the View name and select another view
- To **Rename** a View
  - Click the **View drop-down arrow** to the right of the View name
  - Click **Manage**
    - Either **Mine** or **Shared** display
  - Hover over the View you wish to rename
    - A pencil displays
  - Click the pencil and update the name
  - Press Enter
  - Close (x)**
    - The View is Saved and displays in the View
- To **Delete** a View
  - Hover over the View you wish to delete
  - Click the 'trash can' to the right of the View name
- To **Make/Remove** a View as a 'Favorite'
  - Click the **Favorite 'Star'** to the left of the view name to toggle on or off as a Favorite.
  - Click (x) **Close**
    - If there is no 'star', the View displays under Others section of the View)
- To **Share** Views
  - Click **Share**
    - The Share** - displays
  - Select Private (not shared), Everyone (all who have access) or Specific Groups (predefined by Administrators)
  - Click Copy Link which copies the link to the View to the clipboard for you to 'paste' and socialize to any user(s)
  - Click **Done**
    - The View will be in the "Shared Section the Manage Views window and in the Others' section of a user's View List

