Product Enhancements

July 2020

Check out the latest features available.

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DIGITAL BUDGET BOOK SUITE

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DIGITAL BUDGET BOOK

Text Editor Updates
When you click inside the text editor box it will expand the display to show all of the text instead of only a small portion - making it easier to see the content without scrolling. Also, you can now click directly within a text box to edit text quickly.

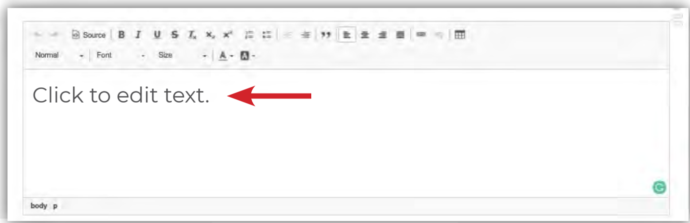
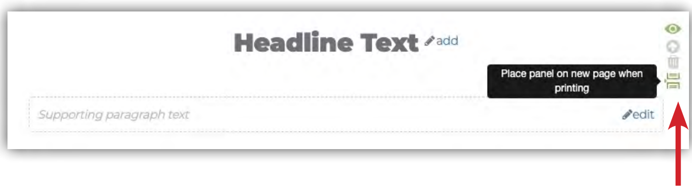
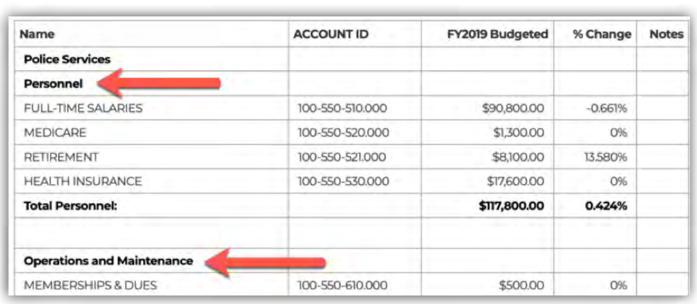


Table Figure Alignment
In the Fund Summary, Department and Debt page tables, financial figures are right-aligned to make them easier to view.

Page Break Panel for Print
A Page Break icon now appears on all panel settings (on the right hand side). Clicking this icon will make this section start at the top of a new page when printing.

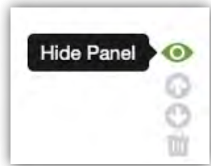


Department Table Grouping
Tables within a Department page will group line items by object. Each object has a header row and a total row. A total row is also displayed for all totals combined at the bottom.



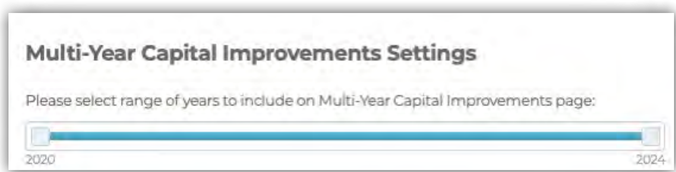
Name	ACCOUNT ID	FY2019 Budgeted	% Change	Notes
Police Services				
Personnel				
FULL-TIME SALARIES	100-550-510.000	$90,800.00	-0.661%	
MEDICARE	100-550-520.000	$1,300.00	0%	
RETIREMENT	100-550-521.000	$8,100.00	13.580%	
HEALTH INSURANCE	100-550-530.000	$17,600.00	0%	
Total Personnel:		**$117,800.00**	**0.424%**	
Operations and Maintenance				
MEMBERSHIPS & DUES	100-550-610.000	$500.00	0%	

Hover Tips for Panel Controls
Users can now hover over the panel control icons to learn their functionality. Panel control icons include: Hide/Show Panel, Move Panel Up or Down, Delete Panel, and Page Break (for print).

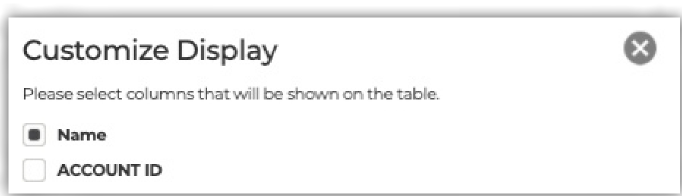


Copy and Paste From Excel
Want to bring figures from an Excel file into your Budget Book? Simply copy and paste content from Excel to your custom panel and it will maintain the original content structure. Note: Formulas and table formatting are not currently supported, but we will be adding support during the next product release.

Multi-Year Capital Improvement Settings
A new feature has been added to the Budget Book settings that allow admins to select which years they would like to show on their Multi-Year Capital Improvements section.



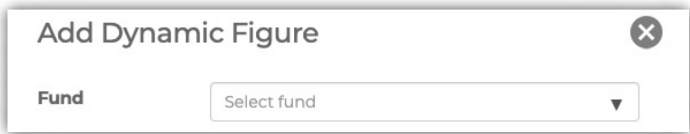
Customize Department Tables
Users can now unselect non-financial columns such as Account Description, Account ID, % Change and Notes in Department tables if they don't want them to display.



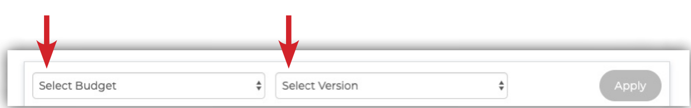
DIGITAL BUDGET BOOK
CONTINUED

Removed Year from Print Cover Page
Previously, when the print version generated the cover page it was inserting the year before the title. Many clients are already putting the year in the budget book title, so we removed it from the cover page so it wouldn't show up twice.

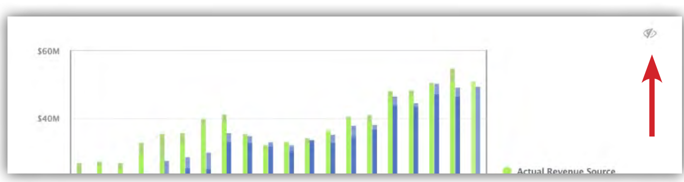
Embed Dynamic Figures into Text
Users may now right click anywhere in the text editor and select 'Dynamic Figures'. The user will then be prompted to select the year, fund and category. This will insert a figure which will be automatically updated anytime the figure is updated in Budget Builder or ClearGov's data onboarding tool. .



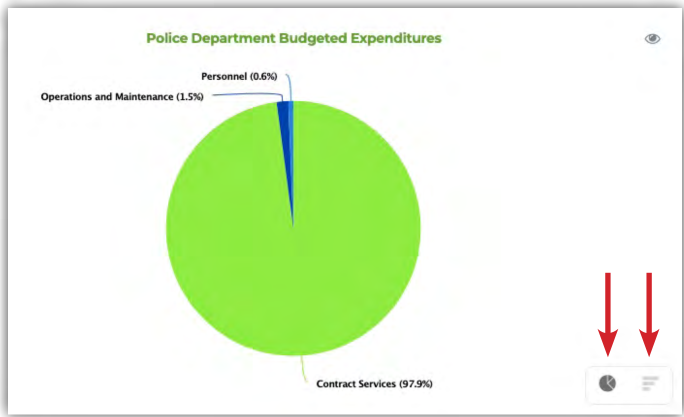
Select Budget and Version
Two new drop-down settings have been added to the Fund Summary page that allows the budget creator to select the budget they want to use and the version that they want to use to power the charts and tables. <u>Note: This feature is currently only available for clients that are using ClearGov Budget Builder to build their budget.</u>



Hide Charts
Editors can now show or hide a chart to control whether or not they want it visible to the public by clicking the eye icon to the right of the chart.



Default Chart View
For charts that have multiple display options, editors can set a view for the chart to display a certain way by default for the public view.

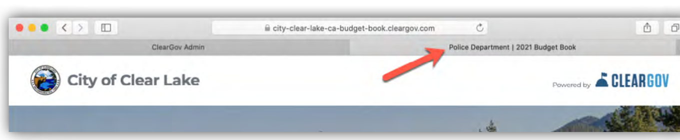


Add Version Columns
Users now have the option to add versions to tables via the 'Customize' feature in Fund Summary and Department page templates. By clicking the 'customize' button they can then select the version columns that they want to be shown on the table.

'Actuals' Toggle Update
Previously, the 'Actuals' toggle in the Transparency > Years app and the Budget Book > Settings tab controlled revenues, expenditures, and debt. This toggle no longer connects to debt, and debt will always appear in the user interface.

Updated Page Titles
Page titles have been update to:
<page name> | <budget book name>

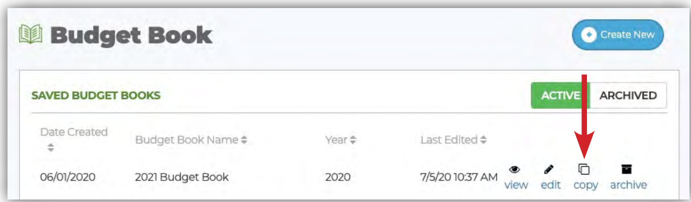
- The budget book name is the first field on the Settings tab



DIGITAL BUDGET BOOK
CONTINUED

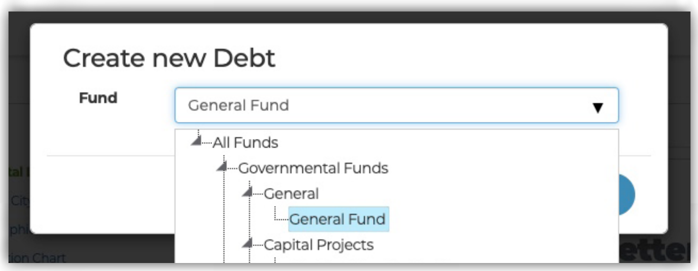
Copy Budget Book

Budget book creators can now copy an existing budget book to make it easier to carry content over from one book to another.



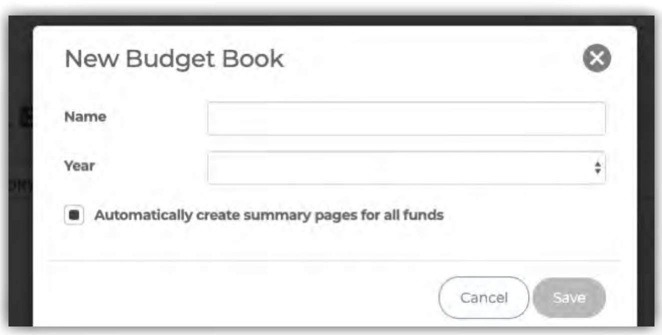
Create a Page in the Debt Section

When a user clicks the 'New page' link in the debt section, the modal will now allow them to select a node level in the fund tree - this then creates a page that uses the same debt by fund template and shows the total debt for that node, the pie chart showing the child categories, and the panels below show the child categories.

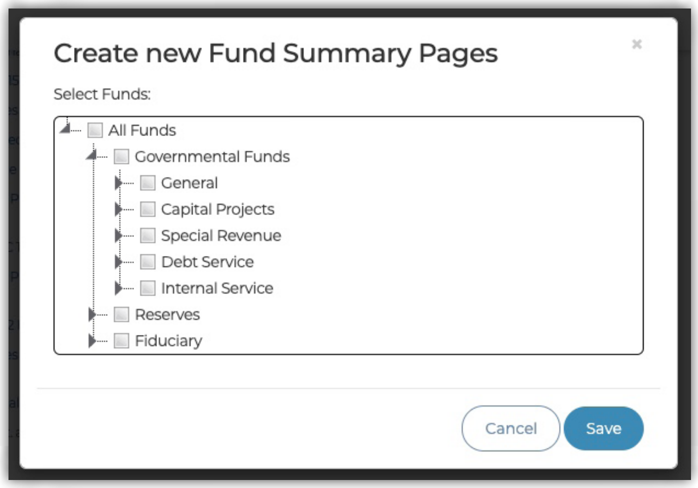


Add Fund Page with Multi-select

We added the ability to add a fund summary page after the budget book is generated. In the 'create new' budget book modal you'll notice a new checkbox option that says 'automatically create summary pages for all funds'.



In the Fund Summaries section, the 'New Page' functionality opens up a modal that shows all the funds in a tree and allows the user to select multiple funds from the tree at once. For example, you can create a view for "Governmental Funds" that shows an aggregated breakdown of all the funds underneath.



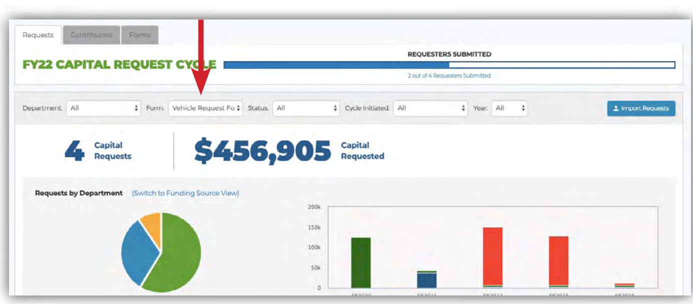
Generate Budget Book Before Onboarding Data

Admins now have the ability to generate a budget book before ClearGov has onboarded their data or finalized their data mapping - helping them get started on their book while we do work in the backend.

CAPITAL REQUESTS

Dashboard Filter Updates

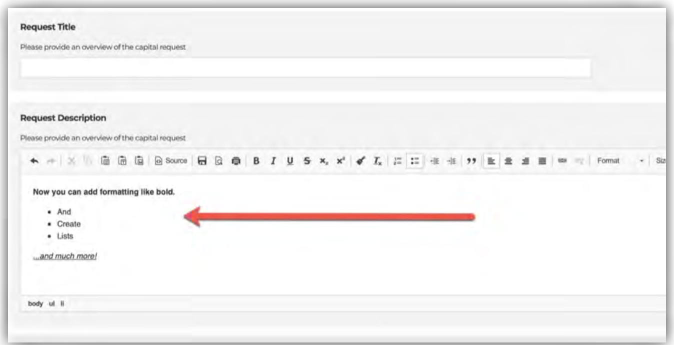
A new 'Form' filter has been added to the Capital Requests Dashboard that allows admins to filter the results based on the form used to submit the request - making it easier to view a list of a certain type of requests at once.



CAPITAL REQUESTS
CONTINUED

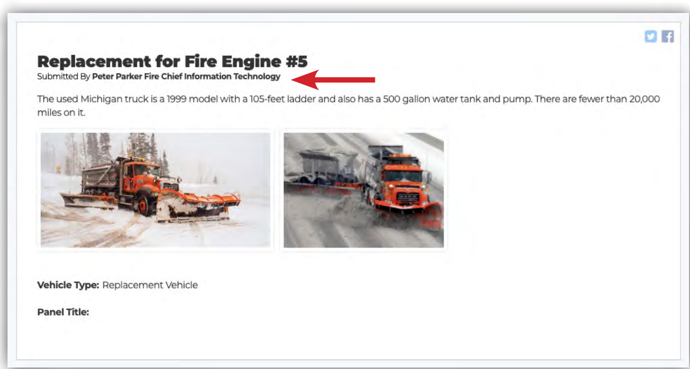
Text Editor Added to Request Description Panel

A text editor has been added to the Capital Requests description panel to enable users to add formatting to fonts, created bulleted lists, and more.



Project Page Improvements

The public page for each capital request will now show the name, title, and department of the person that submitted the capital request. Viewers will also be able to click on an image to enlarge them for a closer look.



Detailed Export

When admins click the 'Export to Excel' button on the Dashboard table, the Excel document generated will now contain all the details of each capital request in separate tabs for each form, in addition to the current Summary tab.

Requester Reminders

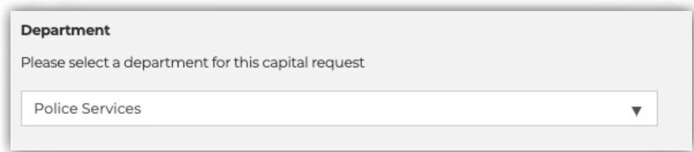
Admins can now enable email reminders for requesters. By clicking the 'Enable Email Reminders' checkbox, requesters would receive an email reminder 14 days, 7 days, 3 days, and 1 day before the due date until they submit their request. Requesters will also receive one reminder 7 days after the deadline if they do not submit a request.

Editors can be Requesters

Capital request editors now have the ability to submit requests.

Reassign Department

Admins can reassign the department that a capital request is assigned to - giving them more flexibility if the department needs to be changed.



Requester with Multiple Departments

If a requester is assigned to multiple departments or a parent category, they will be able to select which department a request belongs to when creating a new request.

Trending Graph Enhancements

We've increased the size of trending graphs on the main dashboard to better display cycles that are longer than 5 years.

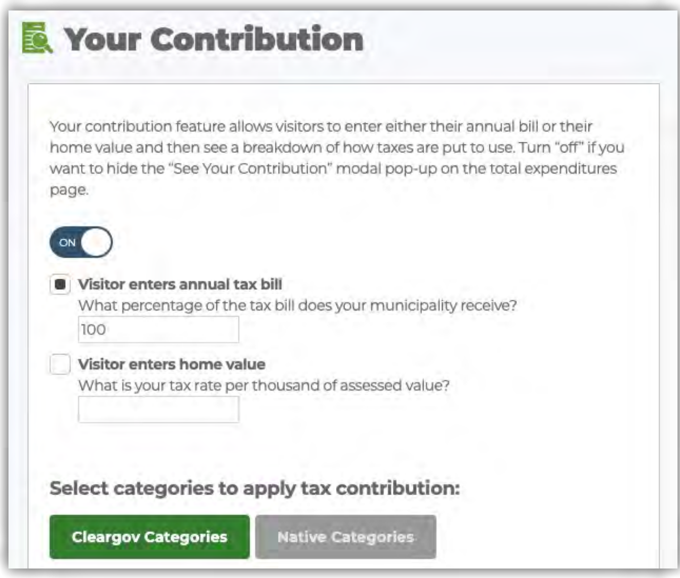
Form Tables Start Year

Previously on the Form template in Capital Requests, the year table for the Project Budget and Funding Sources panel started with the same year as the start of the request cycle. This has been changed to the end year of the request cycle.

TRANSPARENCY

Tax Bill Percentage Contribution

A new feature has been added to the back-office that allows admins to enter the percentage of their tax bill that they receive so when a resident enters their annual tax bill on the Transparency profile the results will be more accurate. For example, if your municipality only receives 30% of tax dollars from residents you can customize this in the back-office. This would simply multiply the tax dollars entered by residents by .3 before dividing amongst the categories in the Transparency profile that residents are viewing.



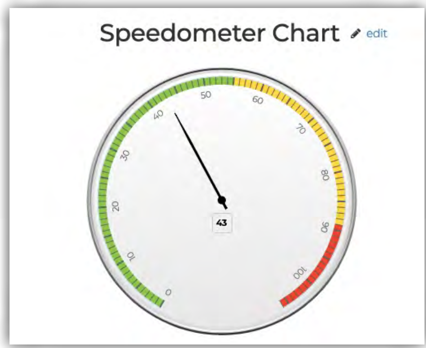
ACROSS APPLICATIONS

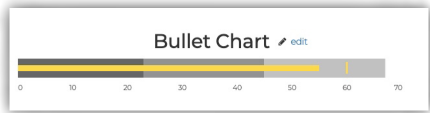
New Custom Panel Options

New custom panel layout options have been added to provide a larger assortment of panels to choose from to customize your page.

New Chart Options

Two new chart options are now available to chart creators to give enjoy more customization options - a Speedometer Chart and a Bullet Chart.





Sort Charts Alphabetically

When a user adds a new chart to a custom panel they will now see the charts listed alphabetically to help them quickly find the chart they're looking for.

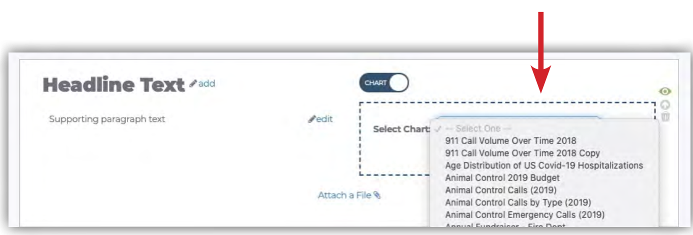
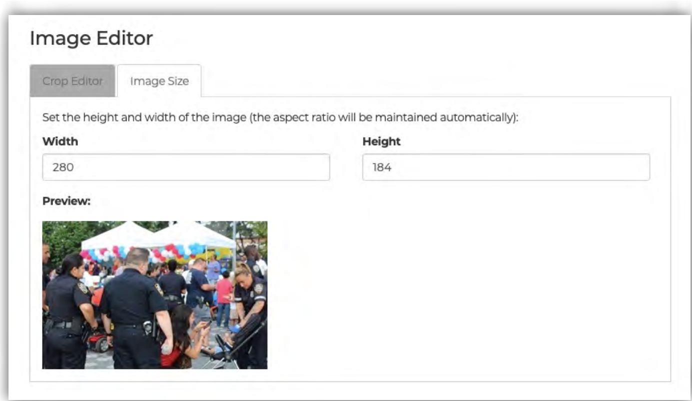


Image Resizing

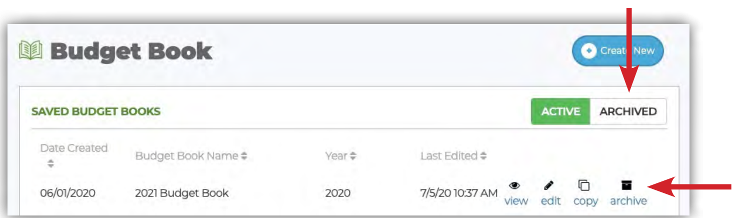
Users can now resize images within a custom panel to ensure it displays in the size of their choice.



ACROSS APPLICATIONS
CONTINUED

Archive Function

An 'Archive' button has replaced the 'Delete' button in the settings of ClearGov Budgets, Forecasts, Digital Budget Book, Projects, Dashboards and Charts. Instead of deleting an item, users will archive it so that it is retrievable and not permanently deleted. A new 'View Archived Items' button will appear on the top of the page where users can access a list of archived items and then choose to permanently delete them if they wish.



Suppress Categories and Line Items Where Value = 0

For Transparency Profile and Digital Budget Book

Categories and line items where the value equals zero will now be suppressed to keep the pages clean with only the information needed being visible.