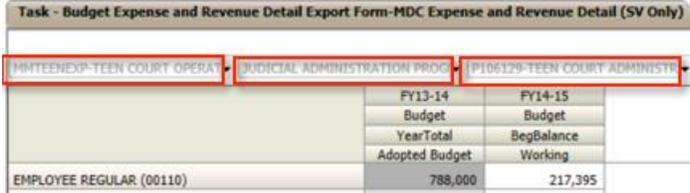


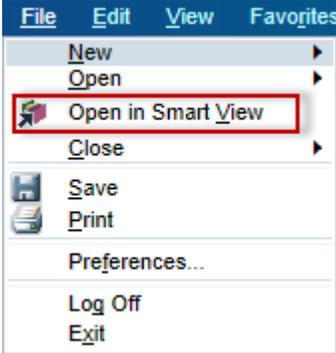
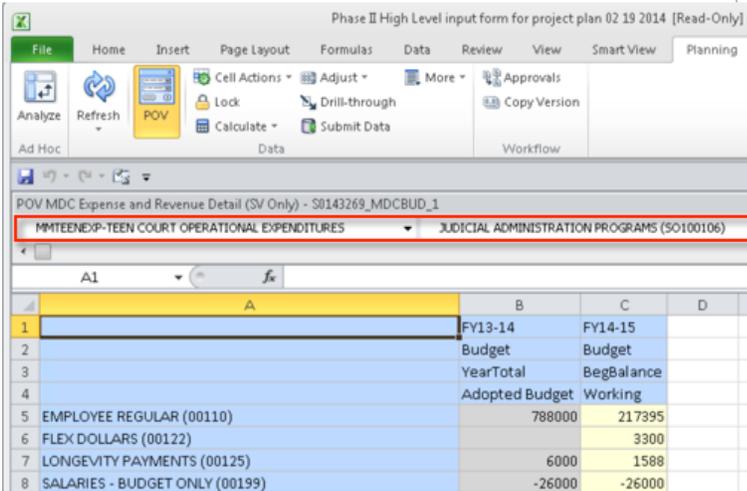
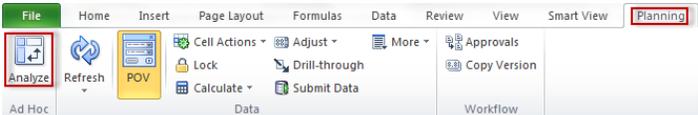
Job Aide: Smart View Analyze Fix

This Job Aide will guide you through the steps to resolve the Point of View display when taking a Form to Analyze View in Smart view. The information in this Job Aide relates to information in training guide - Activity 24.

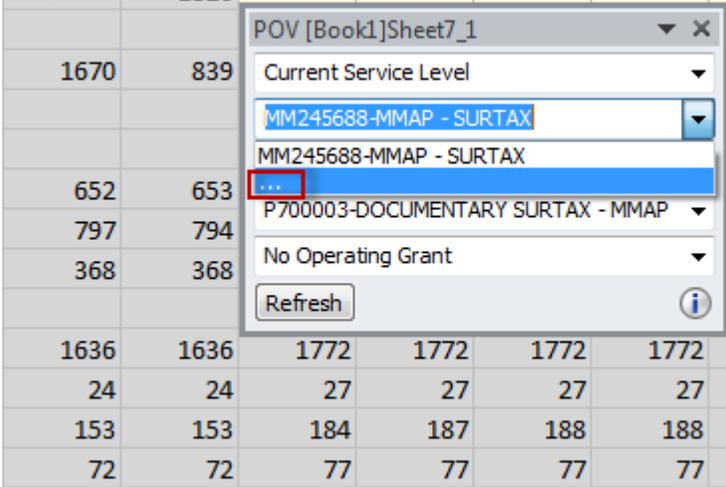
Issue: When opening a BAT Form in Smart View form. You may need to open the Smart View sheet in Analyze mode (in order to perform the Cascade function) When the Analyze sheet displays, the Point of View members (Entity, Fund, Project) may not display correctly.

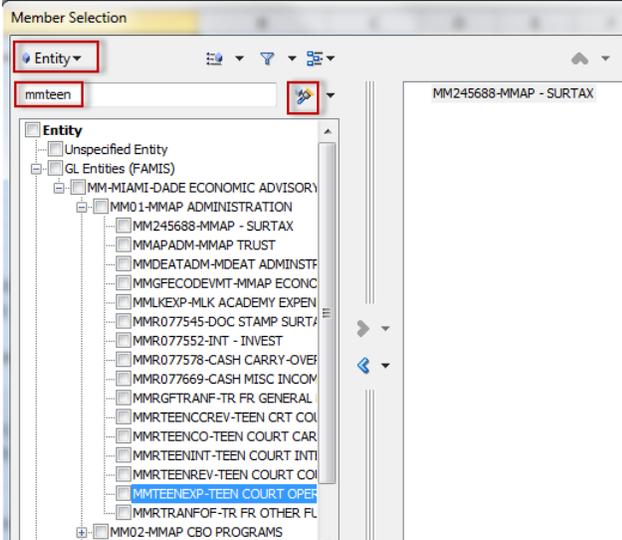
Follow the steps below to make changes to the POV so that the correct members display.

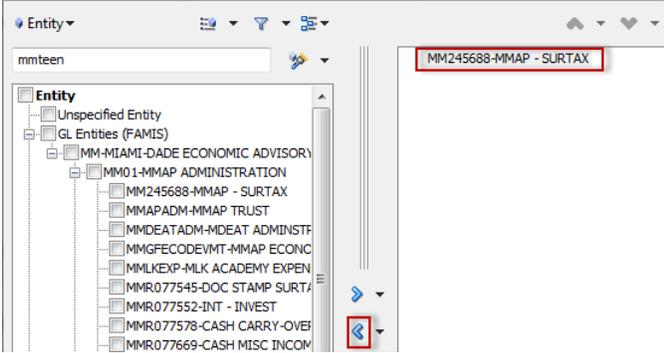
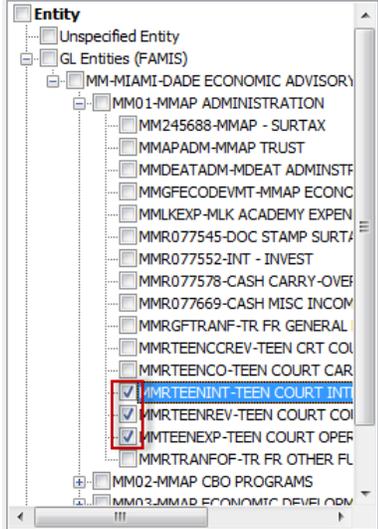
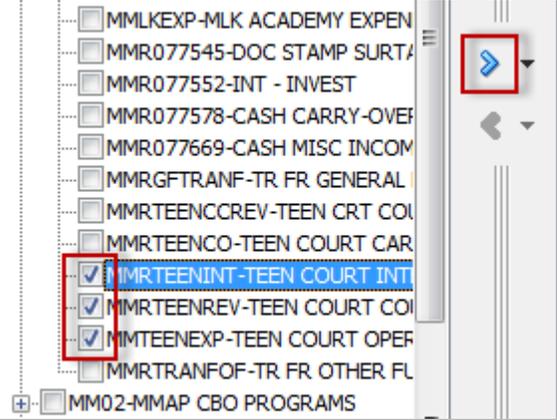
Step	Action	Notes																								
1.	<p>From the Task List, navigate to Operating Smart View Forms > Forecast SmartView Export Form <u>OR</u> Budget Expense and Revenue Detail Export Form.</p>  <p>The screenshot shows a 'My Task List' window with several folders. The folders are: 'Budget - Working - EMM', 'Operating Preparation', 'Human Capital Planning Preparation', 'Human Capital Planning Analysis', 'Operating Smart View Forms', 'Forecast SmartView Export Form', and 'Budget Expense and Revenue Detail Export Form'. The 'Forecast SmartView Export Form' and 'Budget Expense and Revenue Detail Export Form' folders are highlighted with red rectangular boxes.</p>																									
2.	<p>Set the Point of View members at the top of the form.</p>  <p>The screenshot shows a table with the following data:</p> <table border="1"> <thead> <tr> <th colspan="4">Task - Budget Expense and Revenue Detail Export Form-MDC Expense and Revenue Detail (SV Only)</th> </tr> <tr> <th></th> <th>FY13-14</th> <th colspan="2">FY14-15</th> </tr> <tr> <th></th> <th>Budget</th> <th colspan="2">Budget</th> </tr> <tr> <th></th> <th>YearTotal</th> <th colspan="2">BegBalance</th> </tr> <tr> <th></th> <th>Adopted Budget</th> <th colspan="2">Working</th> </tr> </thead> <tbody> <tr> <td>EMPLOYEE REGULAR (00110)</td> <td>788,000</td> <td colspan="2">217,395</td> </tr> </tbody> </table>	Task - Budget Expense and Revenue Detail Export Form-MDC Expense and Revenue Detail (SV Only)					FY13-14	FY14-15			Budget	Budget			YearTotal	BegBalance			Adopted Budget	Working		EMPLOYEE REGULAR (00110)	788,000	217,395		
Task - Budget Expense and Revenue Detail Export Form-MDC Expense and Revenue Detail (SV Only)																										
	FY13-14	FY14-15																								
	Budget	Budget																								
	YearTotal	BegBalance																								
	Adopted Budget	Working																								
EMPLOYEE REGULAR (00110)	788,000	217,395																								

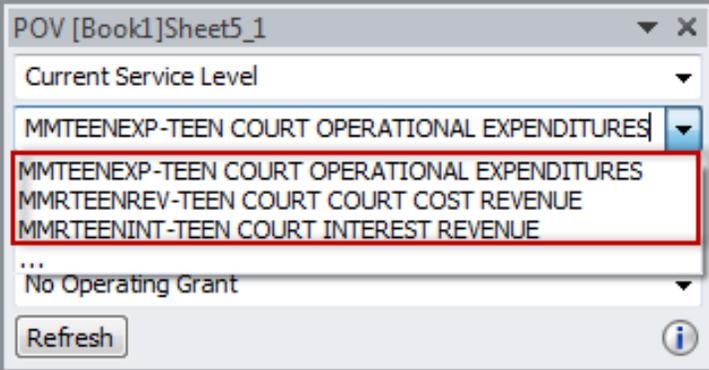
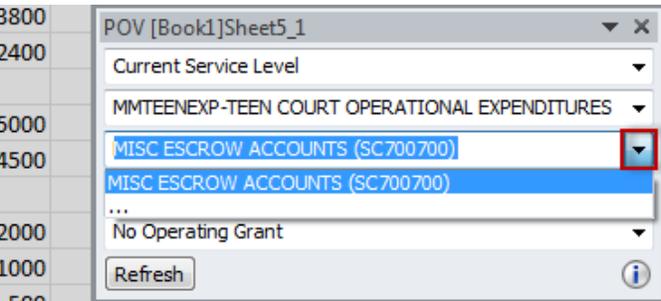
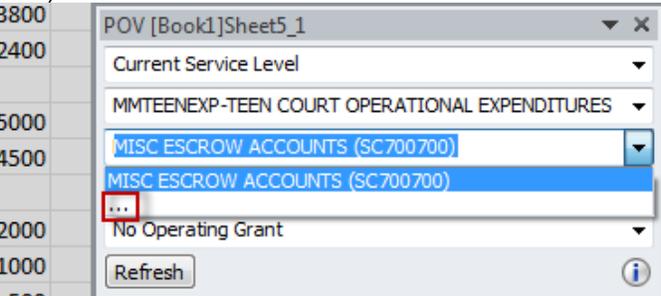
Step	Action	Notes																																													
3.	<p>From the File Menu click on Open in Smart View to display form in Smart View.</p> 																																														
4.	<p>The Web Form displays in Smart View (Excel).</p>  <table border="1" data-bbox="375 1087 1117 1291"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>FY13-14</td> <td>FY14-15</td> <td></td> </tr> <tr> <td>2</td> <td></td> <td>Budget</td> <td>Budget</td> <td></td> </tr> <tr> <td>3</td> <td></td> <td>YearTotal</td> <td>BegBalance</td> <td></td> </tr> <tr> <td>4</td> <td></td> <td>Adopted Budget</td> <td>Working</td> <td></td> </tr> <tr> <td>5</td> <td>EMPLOYEE REGULAR (00110)</td> <td>788000</td> <td>217395</td> <td></td> </tr> <tr> <td>6</td> <td>FLEX DOLLARS (00122)</td> <td></td> <td>3300</td> <td></td> </tr> <tr> <td>7</td> <td>LONGEVITY PAYMENTS (00125)</td> <td>6000</td> <td>1588</td> <td></td> </tr> <tr> <td>8</td> <td>SALARIES - BUDGET ONLY (00199)</td> <td>-26000</td> <td>-26000</td> <td></td> </tr> </tbody> </table>		A	B	C	D	1		FY13-14	FY14-15		2		Budget	Budget		3		YearTotal	BegBalance		4		Adopted Budget	Working		5	EMPLOYEE REGULAR (00110)	788000	217395		6	FLEX DOLLARS (00122)		3300		7	LONGEVITY PAYMENTS (00125)	6000	1588		8	SALARIES - BUDGET ONLY (00199)	-26000	-26000		
	A	B	C	D																																											
1		FY13-14	FY14-15																																												
2		Budget	Budget																																												
3		YearTotal	BegBalance																																												
4		Adopted Budget	Working																																												
5	EMPLOYEE REGULAR (00110)	788000	217395																																												
6	FLEX DOLLARS (00122)		3300																																												
7	LONGEVITY PAYMENTS (00125)	6000	1588																																												
8	SALARIES - BUDGET ONLY (00199)	-26000	-26000																																												
5.	<p>On the Smart View sheet, click the Planning > Analyze.</p> 																																														

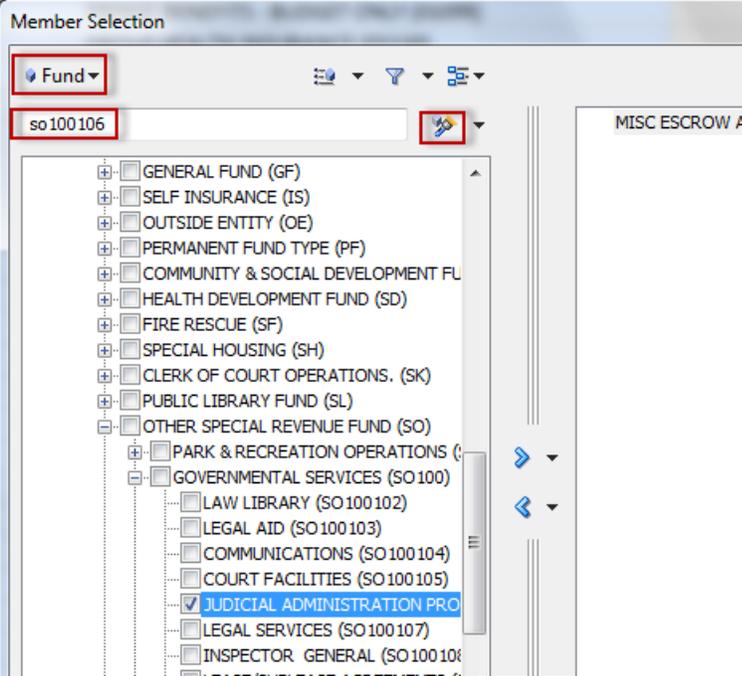
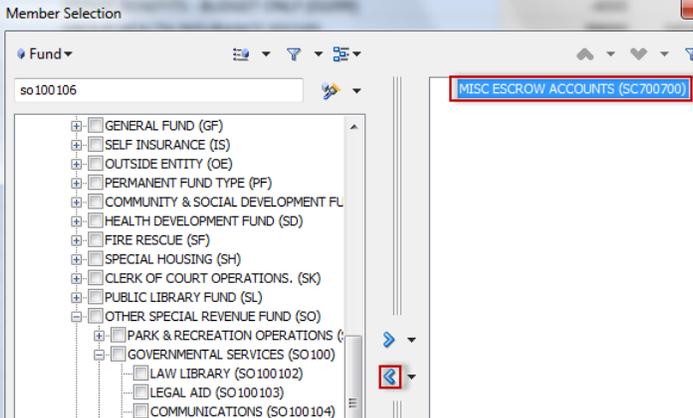
Step	Action	Notes																																																
6.	<p>The form displays in Ad Hoc mode.</p> <p>Here is the potential problem with the Analyze Sheet:</p> <p>The Point of View box may not display the same POV members that you selected when you chose 'Open in Smart View (Step 4 above).</p> <table border="1"> <thead> <tr> <th>FY13-14</th> <th>FY14-15</th> </tr> </thead> <tbody> <tr> <td>Budget</td> <td>Budget</td> </tr> <tr> <td>YearTotal</td> <td>BegBalance</td> </tr> <tr> <td>Adopted Budget</td> <td>Working</td> </tr> <tr> <td>160000</td> <td>166100</td> </tr> <tr> <td></td> <td>3300</td> </tr> <tr> <td>-5000</td> <td></td> </tr> <tr> <td>10000</td> <td>10503</td> </tr> <tr> <td>11000</td> <td>11502</td> </tr> <tr> <td>-1000</td> <td></td> </tr> <tr> <td>21000</td> <td>29580</td> </tr> <tr> <td></td> <td>348</td> </tr> <tr> <td>2000</td> <td>2456</td> </tr> <tr> <td>1000</td> <td>930</td> </tr> </tbody> </table>	FY13-14	FY14-15	Budget	Budget	YearTotal	BegBalance	Adopted Budget	Working	160000	166100		3300	-5000		10000	10503	11000	11502	-1000		21000	29580		348	2000	2456	1000	930																					
FY13-14	FY14-15																																																	
Budget	Budget																																																	
YearTotal	BegBalance																																																	
Adopted Budget	Working																																																	
160000	166100																																																	
	3300																																																	
-5000																																																		
10000	10503																																																	
11000	11502																																																	
-1000																																																		
21000	29580																																																	
	348																																																	
2000	2456																																																	
1000	930																																																	
7.	You will now manually set the POV members to reflect the correct POV on the Analyze form.																																																	
8.	To select the Entity , click the drop-down arrow next to the Entity dimension.																																																	
	<table border="1"> <tbody> <tr> <td>1670</td> <td>839</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>652</td> <td>653</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>797</td> <td>794</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>368</td> <td>368</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>1636</td> <td>1636</td> <td>1772</td> <td>1772</td> <td>1772</td> <td>1772</td> </tr> <tr> <td>24</td> <td>24</td> <td>27</td> <td>27</td> <td>27</td> <td>27</td> </tr> <tr> <td>153</td> <td>153</td> <td>184</td> <td>187</td> <td>188</td> <td>188</td> </tr> <tr> <td>72</td> <td>72</td> <td>77</td> <td>77</td> <td>77</td> <td>77</td> </tr> </tbody> </table>	1670	839					652	653					797	794					368	368					1636	1636	1772	1772	1772	1772	24	24	27	27	27	27	153	153	184	187	188	188	72	72	77	77	77	77	
1670	839																																																	
652	653																																																	
797	794																																																	
368	368																																																	
1636	1636	1772	1772	1772	1772																																													
24	24	27	27	27	27																																													
153	153	184	187	188	188																																													
72	72	77	77	77	77																																													

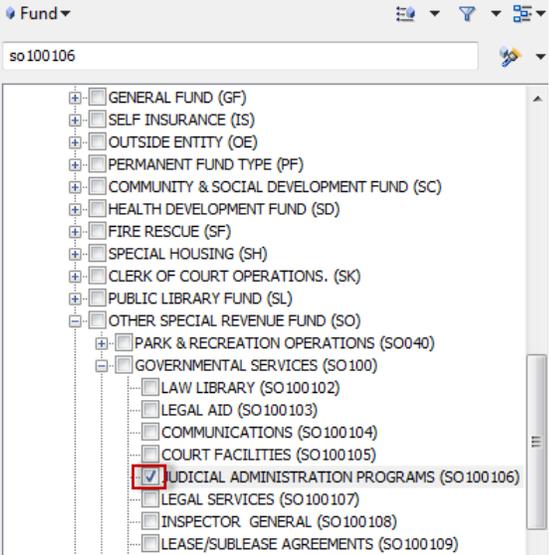
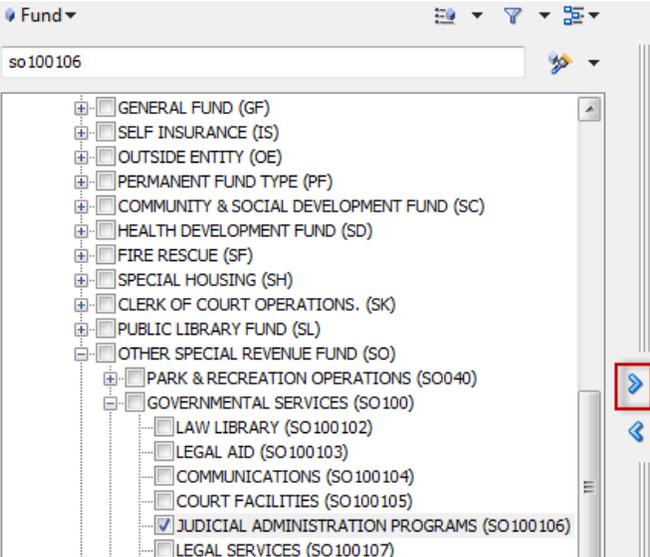
Step	Action	Notes
9.	<p>At the bottom of the selection window, click the ellipsis (3 dots).</p> 	

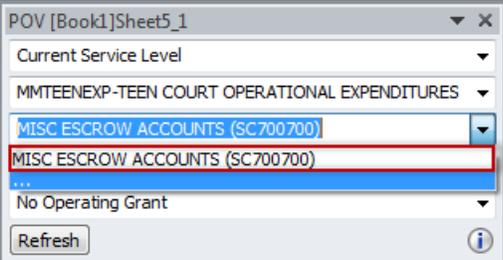
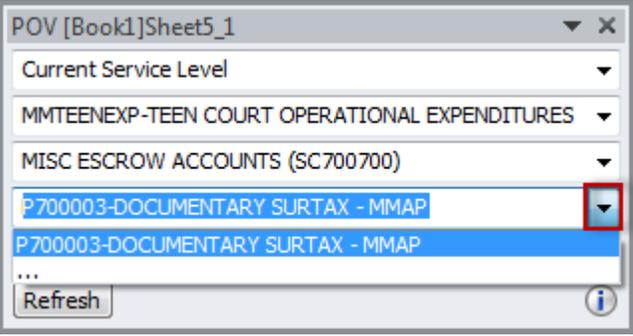
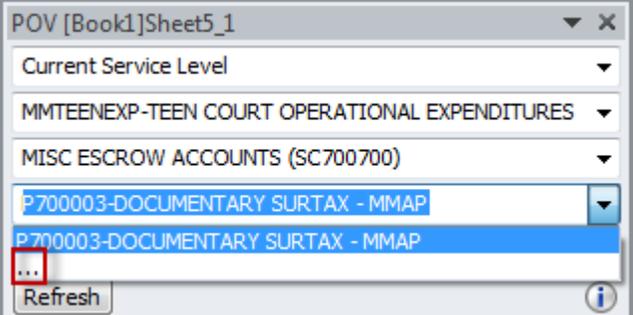
10.	<p>The Member Selection screen appears. Type any part of the Index Code name or number in the search box and click the Search Icon.</p> 	
-----	---	--

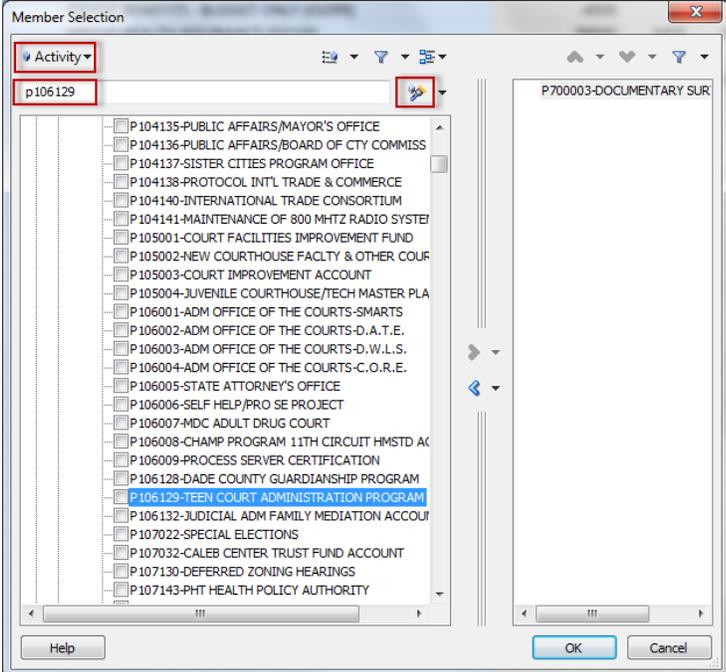
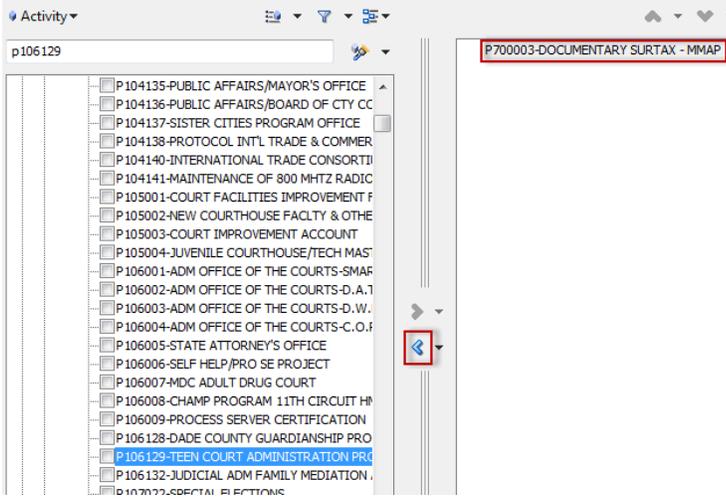
Step	Action	Notes
11.	<p>In the Selection Area, click the Index Code and click the Left - Arrow to remove it from the selection.</p> 	
12.	<p>In the Entity Selection, click the check box next to each Entity (Index Code) that will be included for entry on the Smart View sheet.</p> 	
13.	<p>Click the Right - Arrow to move the members to the Selection area.</p> 	
14.	<p>Click OK.</p> 	

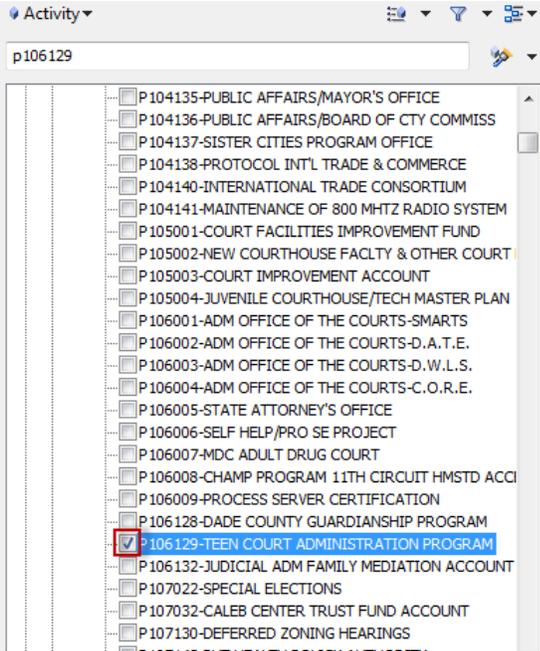
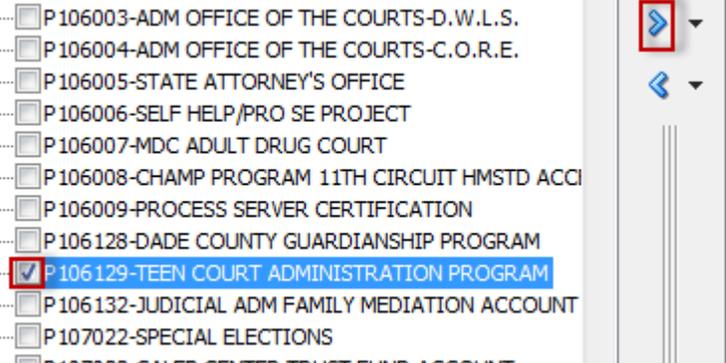
Step	Action	Notes
15.	<p>From the POV box, click the down-arrow next to Entity to view the list of selected members.</p> 	
16.	<p>To select the Fund, click the drop-down arrow next to the Fund dimension.</p> 	
17.	<p>At the bottom of the selection window, click the ellipsis (3 dots).</p> 	

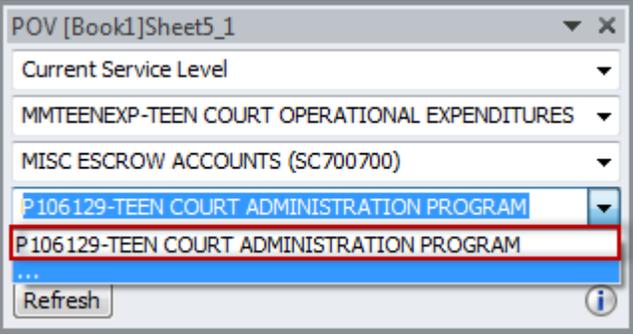
Step	Action	Notes
18.	<p>The Member Selection screen appears. Type any part of the Fund name or number in the Search box and click the Search Icon. (Only one Fund should be selected).</p> 	
19.	<p>In the Selection Area, click the Fund Name/Code and click the Left – Arrow to remove it from the selection.</p> 	

Step	Action	Notes
20.	<p>In the Fund Selection, click the check box next to each Fund that will be included for entry on the Smart View sheet.</p> 	
21.	<p>Click the Right – Arrow to move the members to the Selection area.</p> 	
22.	<p>Click OK.</p> 	

Step	Action	Notes
23.	<p>From the POV box, click the down-arrow next to Fund to view the list of selected member.</p> 	
24.	<p>To select the Activity, click the drop-down arrow next to the Activity dimension.</p> 	
25.	<p>At the bottom of the selection window, click the ellipsis (3 dots).</p> 	

Step	Action	Notes
26.	<p>The Member Selection screen appears. Type any part of the Activity name or number in the search box and click on the Search Icon. (Only one Activity should be selected)</p> 	<p>All Activities/Projects begin with the letter P.</p>
27.	<p>In the Selection Area, click the Activity Name/Code and click the Left – Arrow to remove it from the selection.</p> 	

Step	Action	Notes
28.	<p>In the Activity Selection, click the check box next to each Activity that will be included for entry on the Smart View sheet.</p> 	
29.	<p>Click the Right – Arrow to move the members to the Selection area.</p> 	
30.	<p>Click OK.</p> 	

Step	Action	Notes
31.	<p>From the POV box, click the down-arrow next to Activity to view the list of selected members.</p> 	
32.	<p>You may now proceed with the Cascade functions outlined in the training guide (Activity 24). Once complete you will send the Budget and Forecast sheets to the non-BAT budget users for input.</p>	

--END--