
Smart View End User Training Guide

Course Code: HYP.GEN.SV

Course Title: Smart View Training Guide

Table of Contents

MODULE 1: INTRODUCTION	3
Smart View Learning Objectives	3
MODULE 2: CONNECT TO SMARTVIEW	4
MODULE 3: SETTING UP A DATA QUERY	10
Topic 1: Default Grid	10
Topic 2: Updating the Point of View	11
Member Selection.....	12
Topic 3: Ad Hoc Template	14
MODULE 4: USING AD HOC FUNCTIONS TO ANALYZE DATA	15
Topic 1: Drill down on Dimensions (Zoom)	15
Topic 2: Pivoting Dimensions	16
Topic 3: Alias Tables.....	17
MODULE 5: SMARTVIEW OPTIONS	18
Topic 1: Hierarchy Options	18
Topic 2: Suppress Row Options.....	19
Topic 3: Formatting and Navigating Options	19
Topic 4: Display Options	20
MODULE 6: FINSTMT SMARTVIEW EXERCISES	22
Topic 1: Hyperion-Specific FINSTMT Dimensions	22
Topic 2: Exercise 1 – Set Up a Data Query	23
Part 1: Set Up Options.....	23
Part 2: Adding Dimensions to the Rows and Columns.....	24
Part 3: Select Dimension Members.....	26
Part 4: Final Query Set Up.....	29
Topic 3: Exercise 2 – Ad Hoc Functions.....	31
Part 1: Pivot, Zoom, and Keep Only Functions.....	31
MODULE 7: PSTN_RPT SMARTVIEW EXERCISES.....	38
Topic 1: Hyperion-Specific PSTN_RPT Dimensions	38
Topic 2: Exercise 1 – Set Up a Data Query	39
Part 1: Set Up Options.....	39
Part 2: Adding Dimensions to the Rows and Columns.....	41

Part 3: Select Dimension Members.....	43
Part 4: Final Query Set Up.....	46
Topic 3: Exercise 2 – Ad Hoc Functions.....	48
Part 1: Pivot, Zoom, and Keep Only Functions.....	48
MODULE 8: COURSE SUMMARY	52
Course Content Summary.....	52

MODULE 1: INTRODUCTION

Smart View is an add-in that is installed in Microsoft Excel which allows users to interact with the Hyperion System and view data. Smart View Ad Hoc reporting functionality gives users the ability to pull data from Hyperion in an Excel format. To retrieve data, a combination of all dimensions is required. Users must establish a connection to the data source in order to access Smart View. The data in Smart View reflects data inputs in forms for the same intersection of dimensions.

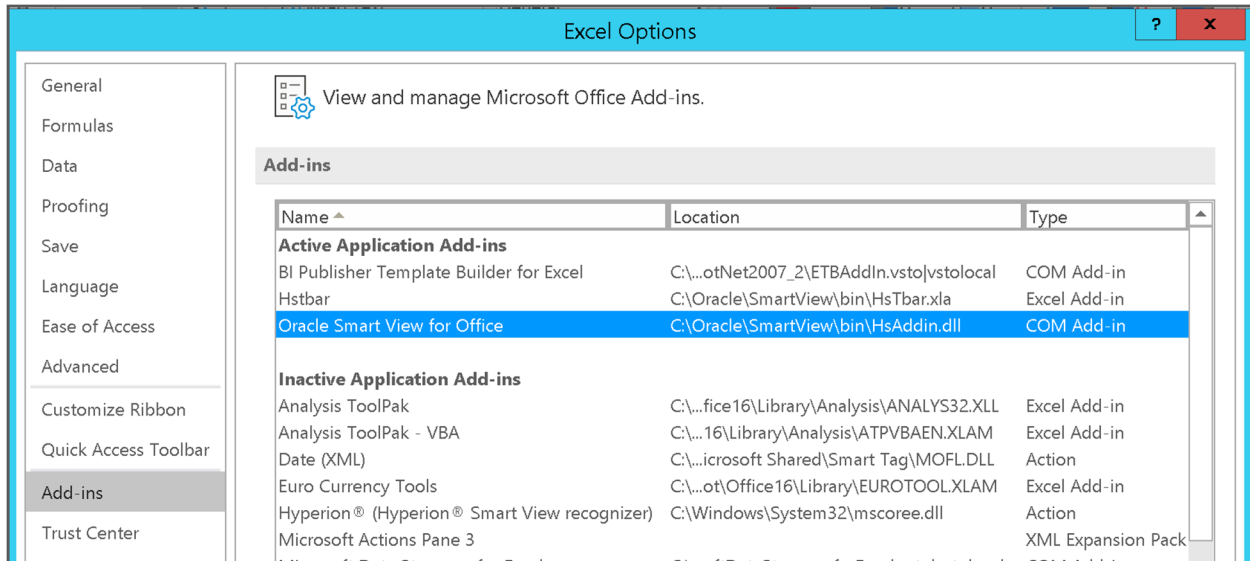
SMART VIEW LEARNING OBJECTIVES

Upon completion of this Smart View training, you should be able to:

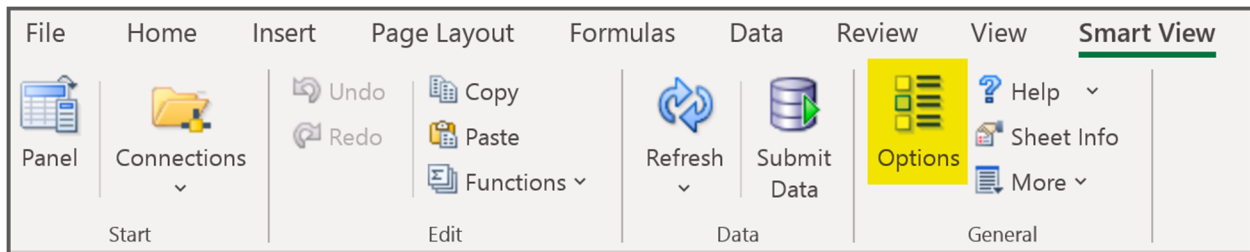
- Connect to Smart View
- Set Up a Data Query
- Use Smart View Ad Hoc Functions to Analyze Data

MODULE 2: CONNECT TO SMARTVIEW

Open Microsoft Excel. Navigate to **File** → **Options** → **Add Ins**. Ensure that the Oracle Smart View for Office extension has been enabled.

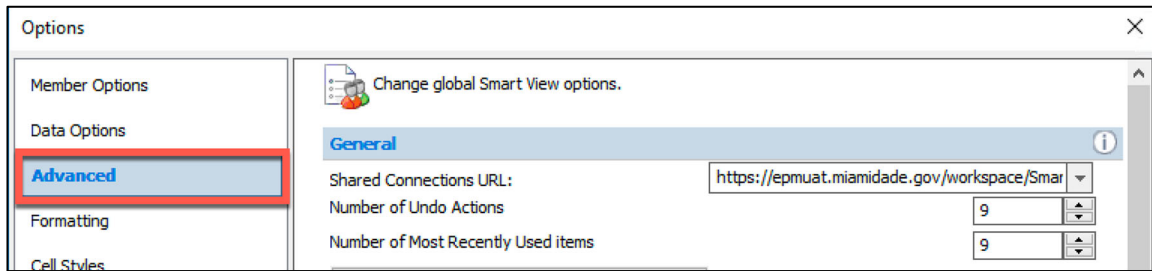


Select the **Smart View** Ribbon, then click **Options**.

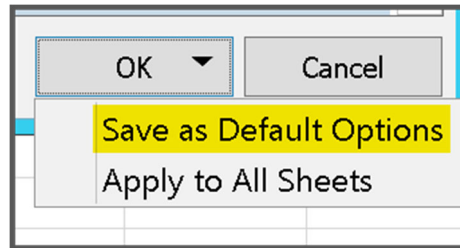


Select **Advanced** in the left-hand panel. In the General section, enter the following URL for Shared Connections URL:

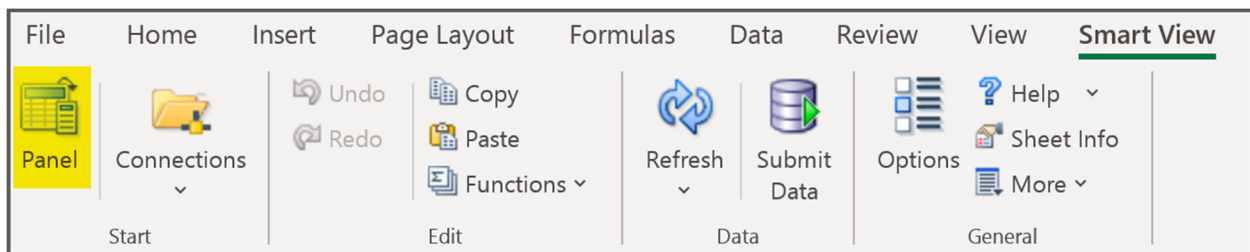
UAT: <https://epmuat.miamidade.gov/workspace/SmartViewProviders>



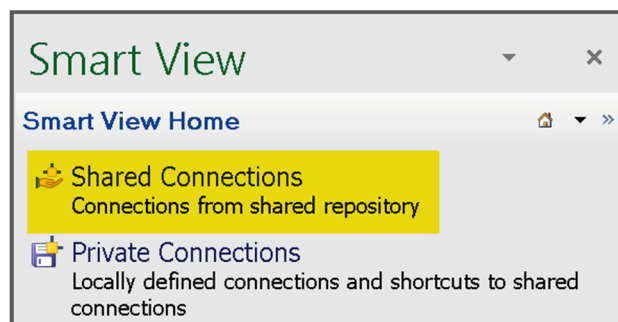
Save As Default Options.



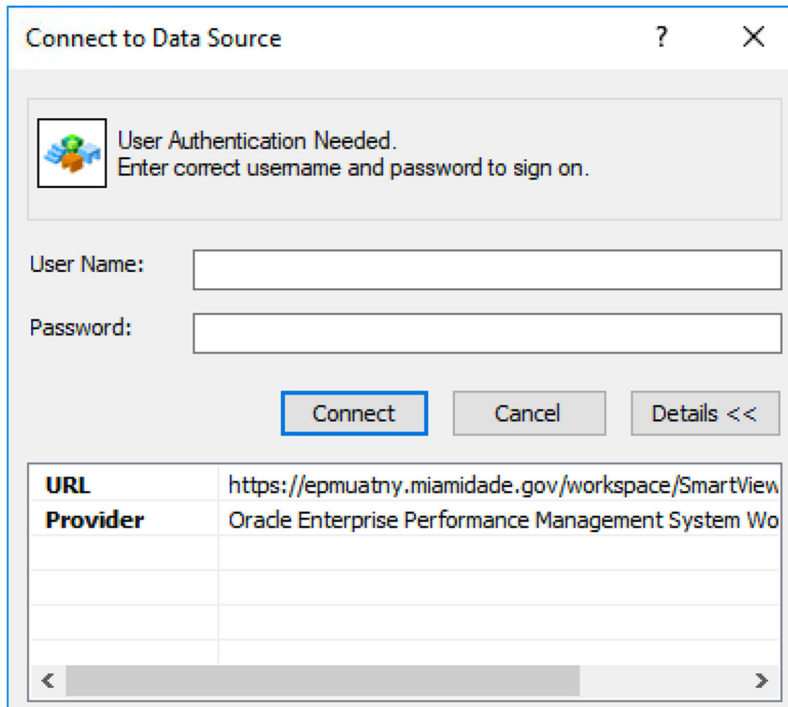
Select the **Smart View** Ribbon, then click **Panel**.



Click **Shared Connections** from the panel on the right.



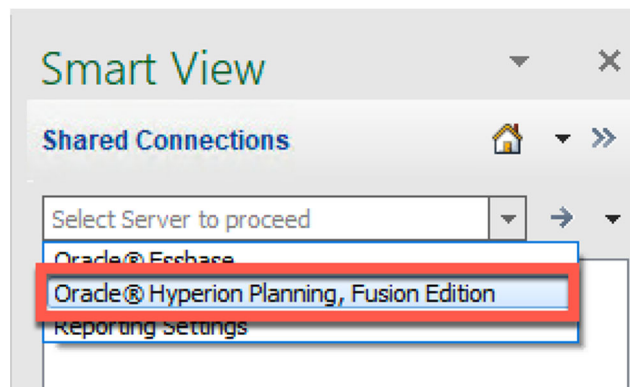
Enter Username and Password. Click **Connect**.



The "Connect to Data Source" dialog box displays a "User Authentication Needed" message. It includes input fields for "User Name" and "Password", and buttons for "Connect", "Cancel", and "Details <<". Below the input fields is a table with two columns: "URL" and "Provider".

URL	Provider
https://epmuatny.miamidade.gov/workspace/SmartView	Oracle Enterprise Performance Management System Wo

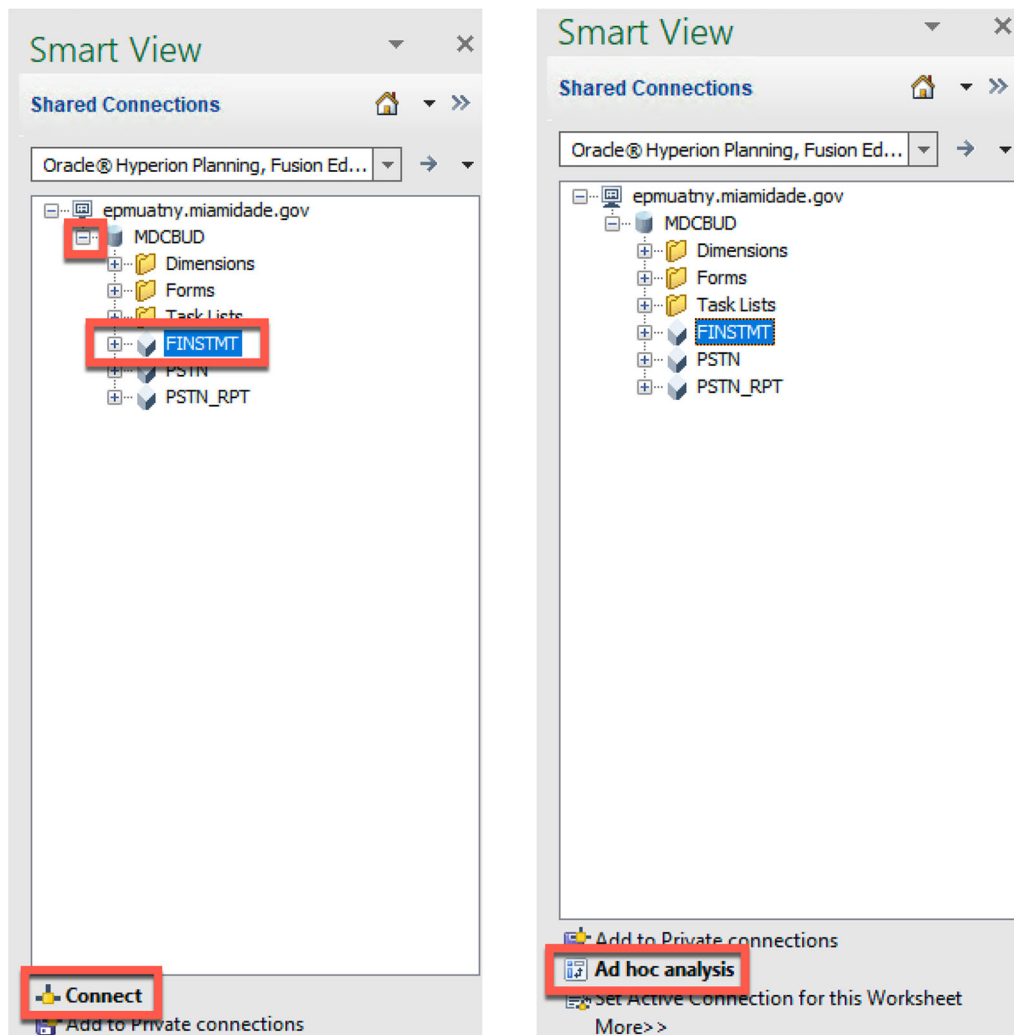
On the right-side panel, click the drop down for Select Server to Proceed and select **Oracle Hyperion Planning, Fusion Edition**.



The "Smart View" window shows the "Shared Connections" section. A dropdown menu is open, displaying a list of connections. The connection "Oracle® Hyperion Planning, Fusion Edition" is highlighted with a red box.

Select Server to proceed
Oracle® Essbase
Oracle® Hyperion Planning, Fusion Edition
Reporting Settings

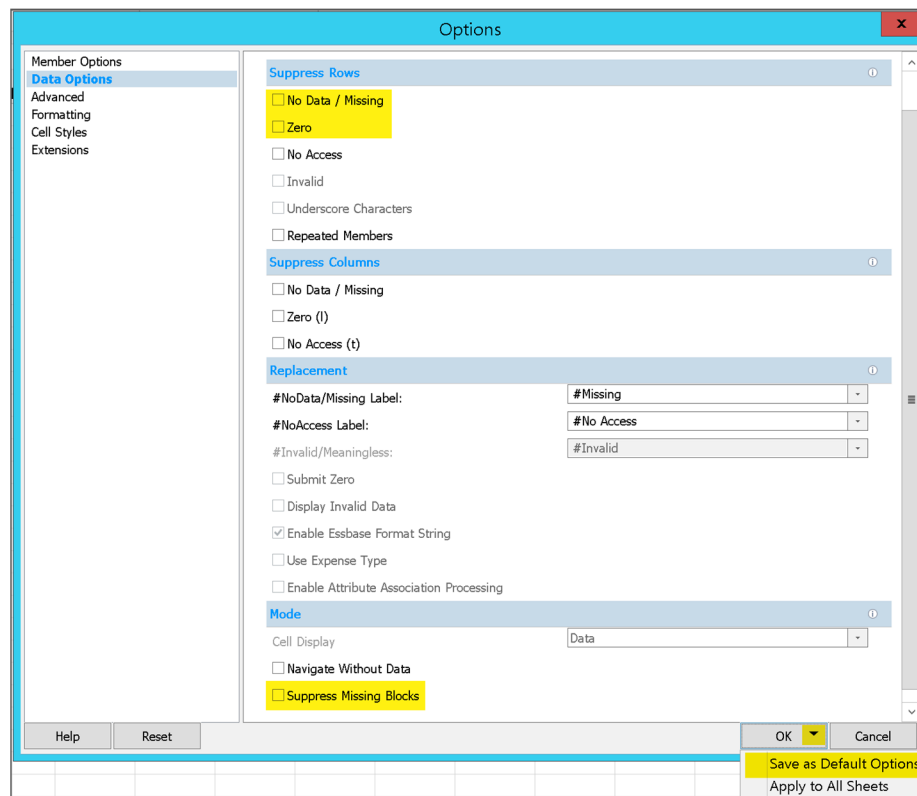
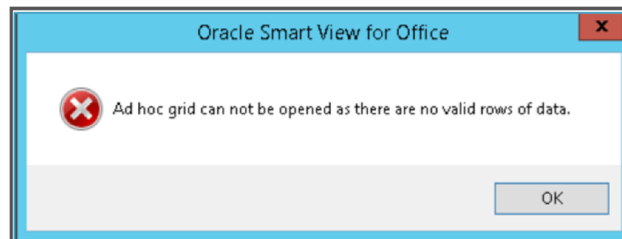
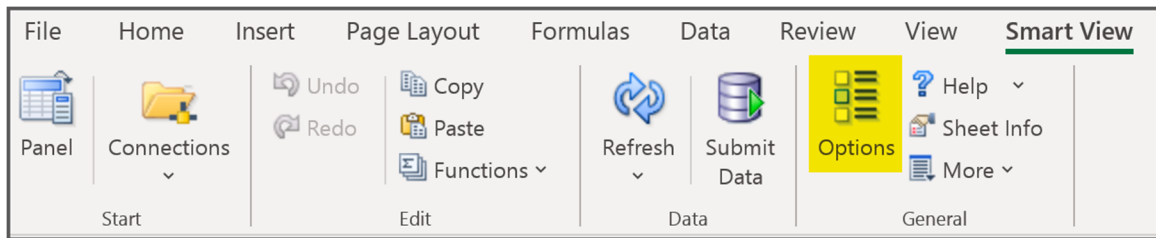
Click the **Plus Icon** next to **empuatny.miamidade.gov**. Click the **Plus Icon** next to **MDCBUD**. Select **FINSTMT**, then **Connect**, then **Ad Hoc Analysis**.



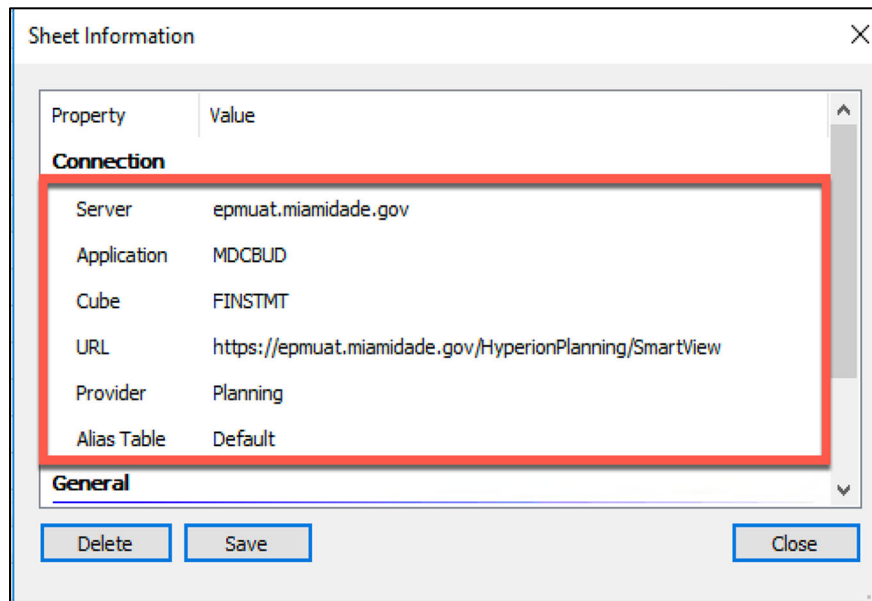
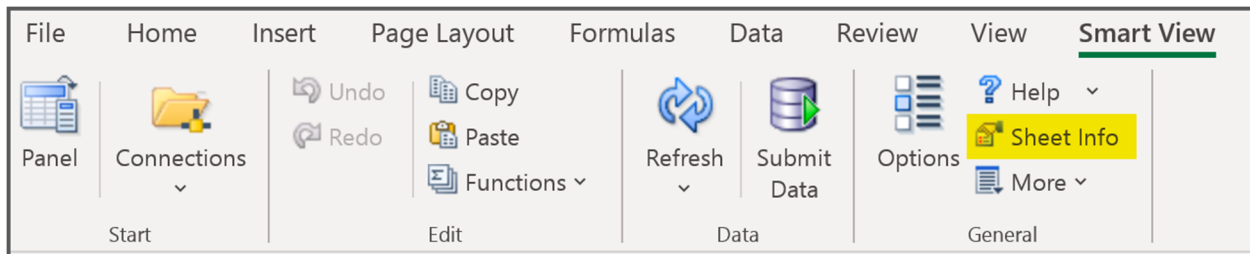
If you receive an Error Message:

- Open the Options Menu
- Click on Data Options: ensure that none of the suppression settings are checked
- Uncheck the Suppression Options
- Click the drop down next to OK and select **Save as Default Options**

Return to the right-side panel and select **Ad Hoc Analysis** again.



Confirm your connection by going to **Smart View** → **Sheet Info**. Make sure you are connected to **UAT**! You will need to change your URL to “**Production**” after Go-Live.

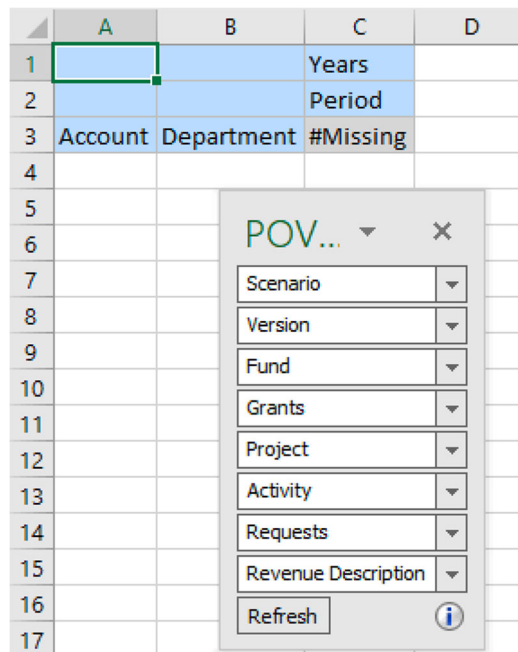


MODULE 3: SETTING UP A DATA QUERY

After setting up a data query you will use frequently, save the excel workbook and reuse.

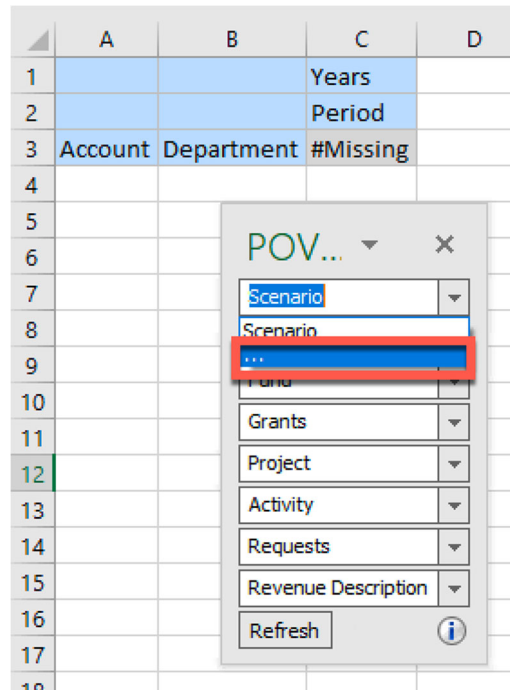
TOPIC 1: DEFAULT GRID

To build reports, you must first modify the default layout to match your requirements. The default grid layout is specific to the Hyperion Planning data source (in this case, FINSTMT). The default ad hoc grid displays Account and Department on the rows and Years and Periods in the columns. All remaining dimensions default to the first member of the dimension and display in the POV window (first member of the dimension is the name of the dimension). You can begin working with the data using the default grid layout, or you can update the columns and rows with additional or different dimension members. We will be modifying the default grid today. To customize a grid, you can change the members in the Point of View. You can also move the members from the point of view into the grid columns and rows.

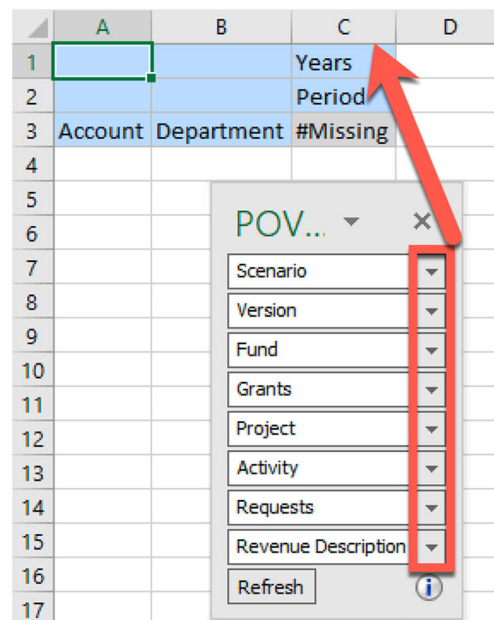


TOPIC 2: UPDATING THE POINT OF VIEW

Update using the POV toolbar change the dimension or member by clicking on the down arrow and click on the "...". The member selection window will pop up and allow you to add new selection options in the POV.



Move POV members to the row or column. Click and drag the down arrow next to the dimension name to the cell you wish to add it to.

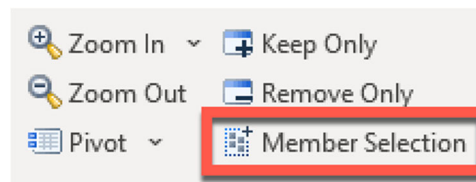


MEMBER SELECTION

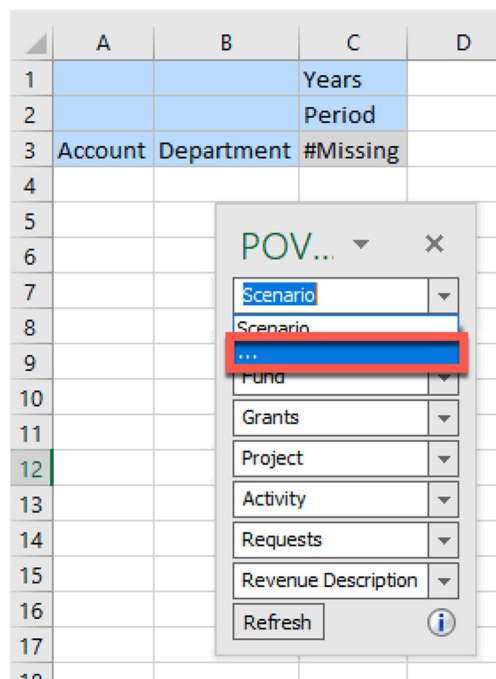
There are two ways to select members: Using the Member Selector and typing member names directly onto the grid.

Option 1 (Using the Member selection Window)

Open the Member Selection Window by selecting the dimension cell and then **Member Selection** button on the Planning Ad Hoc toolbar.

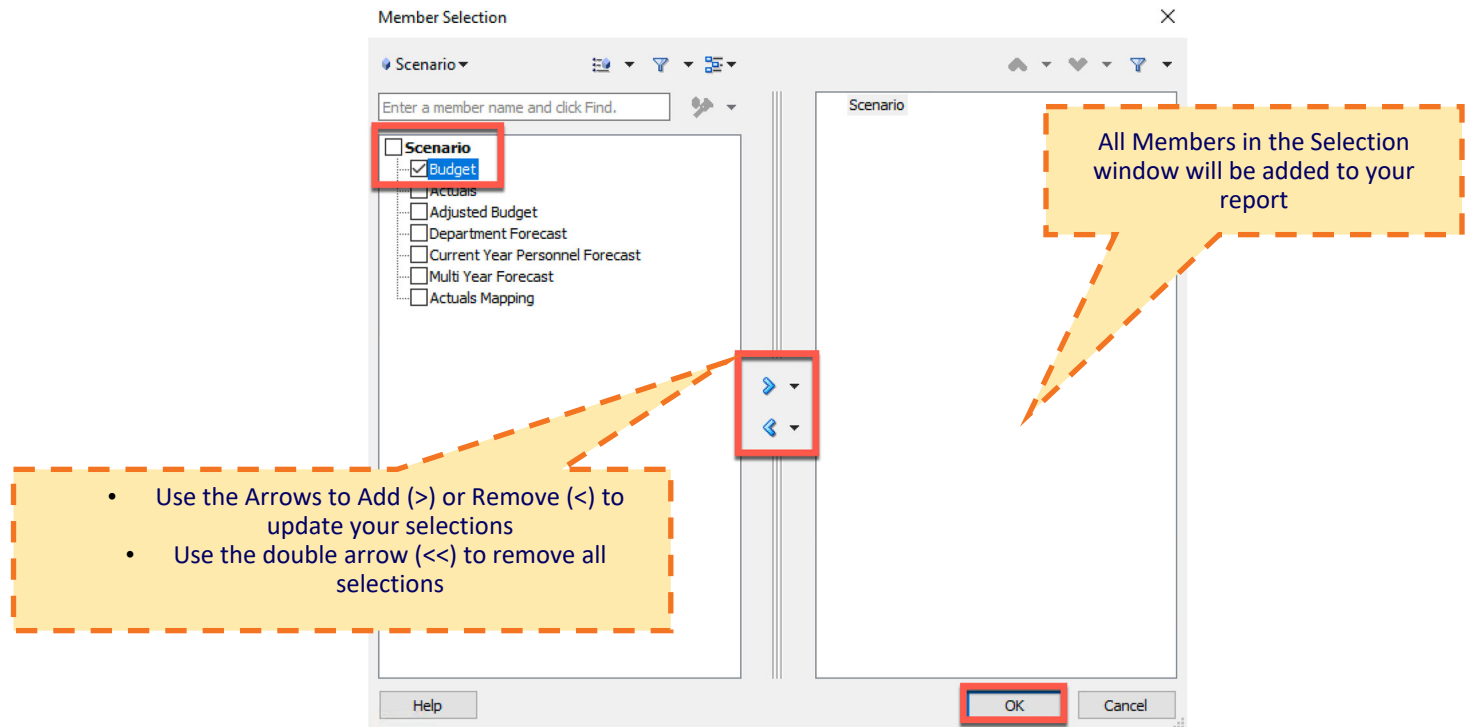


Or open the Member Selection Window by clicking the “...” in the dimension dropdown from a POV dimension.



Member Selection Window

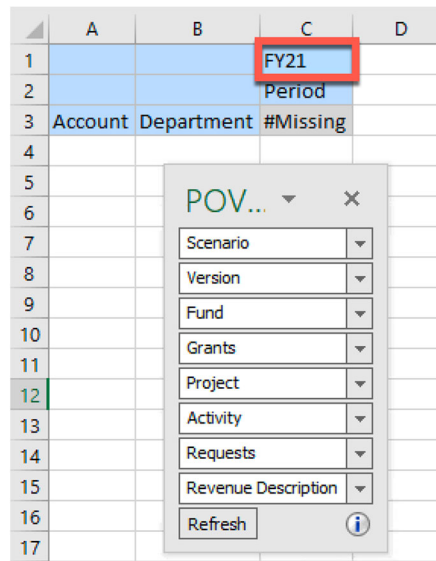
If applicable, expand the dimension hierarchy using the plus icon on the left side. Check the box next to the desired member. Click the right arrow to add the member to the selection window on the right. Click **OK** to return to the grid. (The Left arrow removes members from the selection window back to the left side.)



Option 2 (Manually Update Member Names)

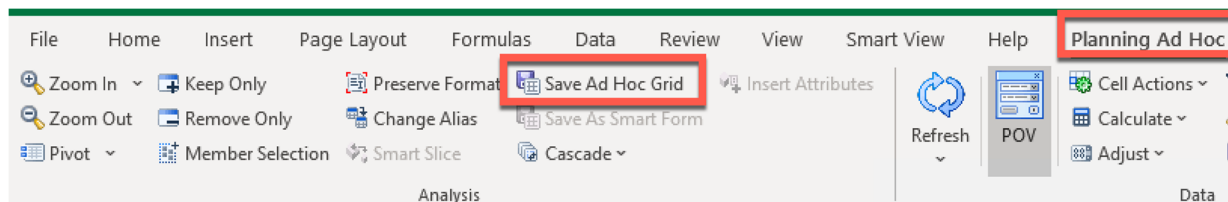
Select the cell you wish to update. Type in the exact name of the desired member.

- For Example: FY21



TOPIC 3: AD HOC TEMPLATE

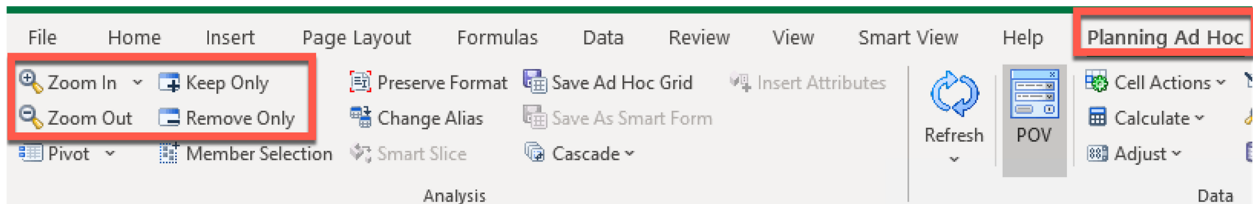
Any Ad Hoc Query can be saved for future use from the Planning Ad Hoc Toolbar. For example, use the template when uploading a large quantity of budget lines that require you to go to several different data forms to load. Templates are used only on Financial Data.



MODULE 4: USING AD HOC FUNCTIONS TO ANALYZE DATA

TOPIC 1: DRILL DOWN ON DIMENSIONS (ZOOM)

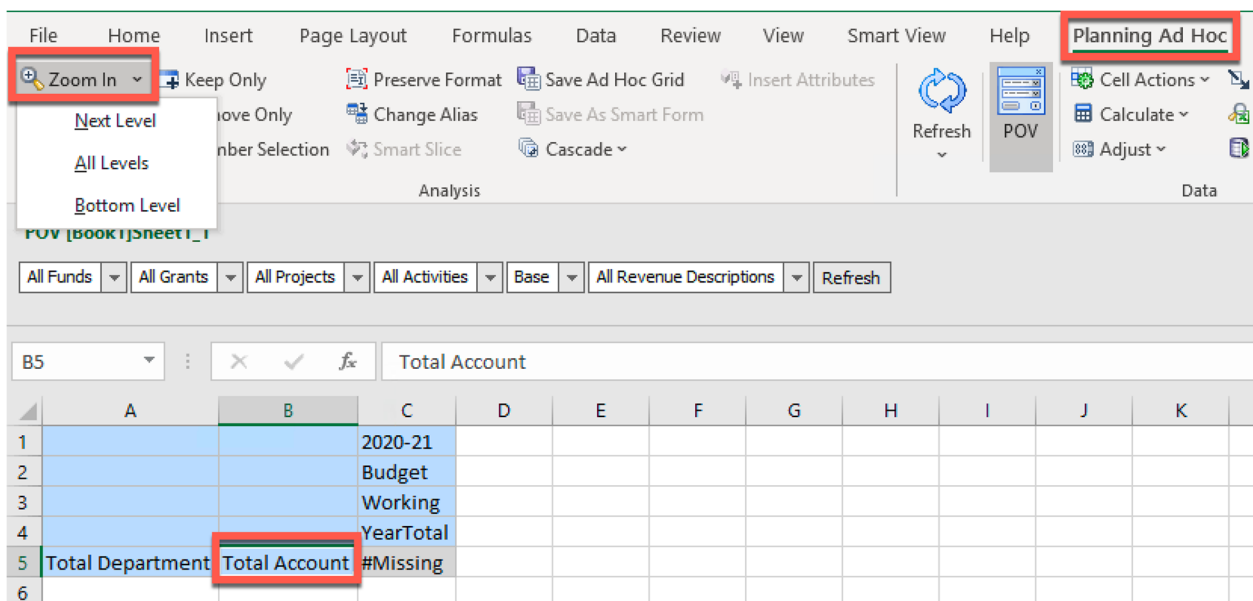
Ad hoc functionality allows you to zoom in or out in the dimension hierarchies. Navigate to Ad Hoc Planning Ribbon.



Zoom In:

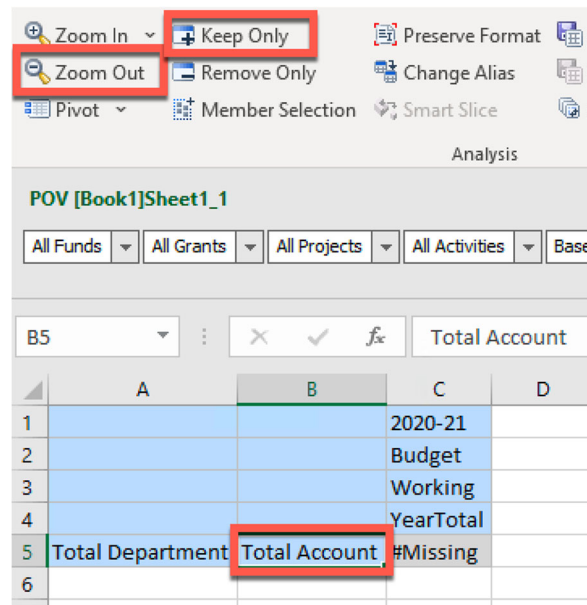
- Option 1:
 - Select Dimension Cell
 - Click **Zoom In**, or Select the drop-down arrow for different levels
- Option 2:
 - Select Dimension Cell
 - Double Click to Drill down a level

*Note: In Options you can enable which level double click drills down to. (Next Level, All Levels, or Bottom Level)



Zoom Out:

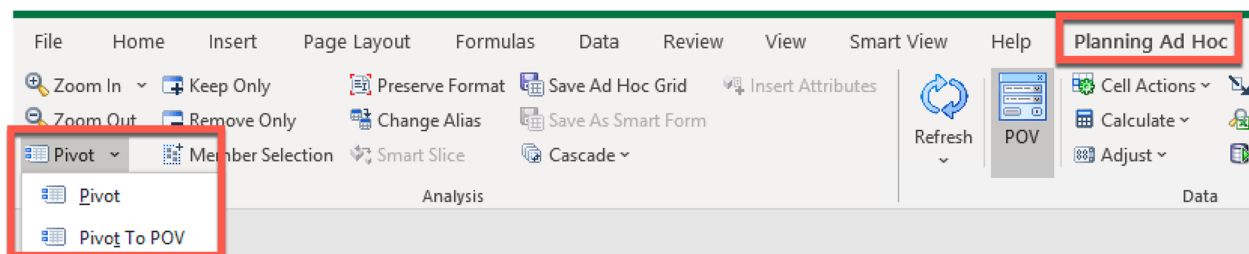
- Option 1:
 - Select Dimension Cell
 - Click **Zoom Out**
- Option 2:
 - Select Dimension Cell
 - Click **Keep Only** to remove all other dimension members



TOPIC 2: PIVOTING DIMENSIONS

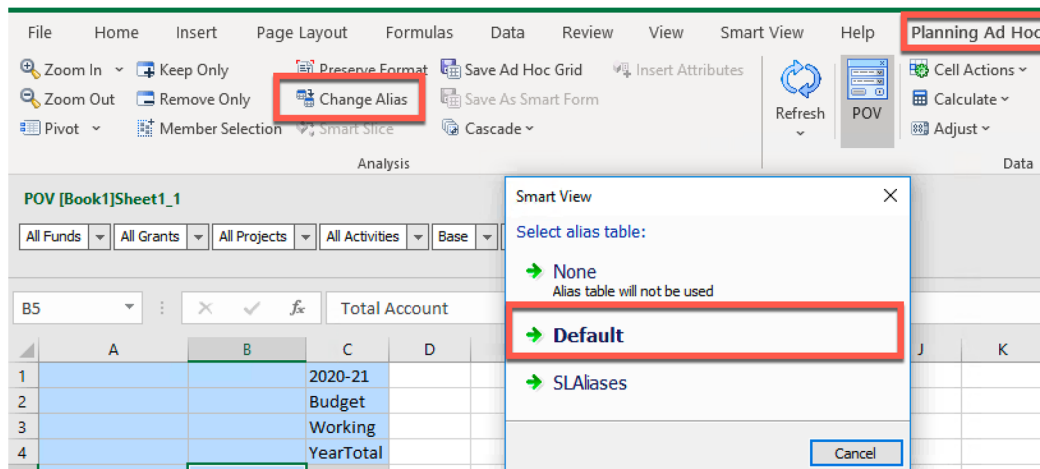
Ad hoc functionality allows you to pivot the dimension hierarchies from columns to rows (and vice versa) and to the POV. Navigate to Ad Hoc Planning Ribbon.

- Pivot in Grid – Select Dimension Cell click **“Pivot”**
- Pivot to POV – Select Dimension Cell click the drop down next to **“Pivot”** and select **“Pivot to POV”**



TOPIC 3: ALIAS TABLES

Alias names have been defined for each member in a dimension. The alias matches the member description. Update Alias Table to Display Alias Names rather than the Member Names by navigating to Planning Ad Hoc Ribbon. Click **Change Alias**. Select **Default**.

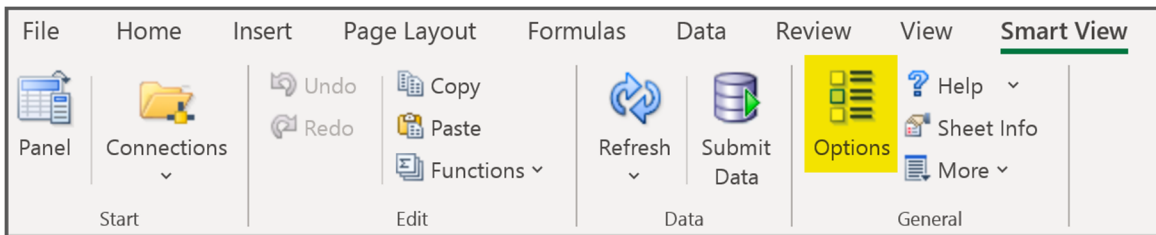


MODULE 5: SMARTVIEW OPTIONS

Most settings only take effect after you refresh or perform all drill operations.

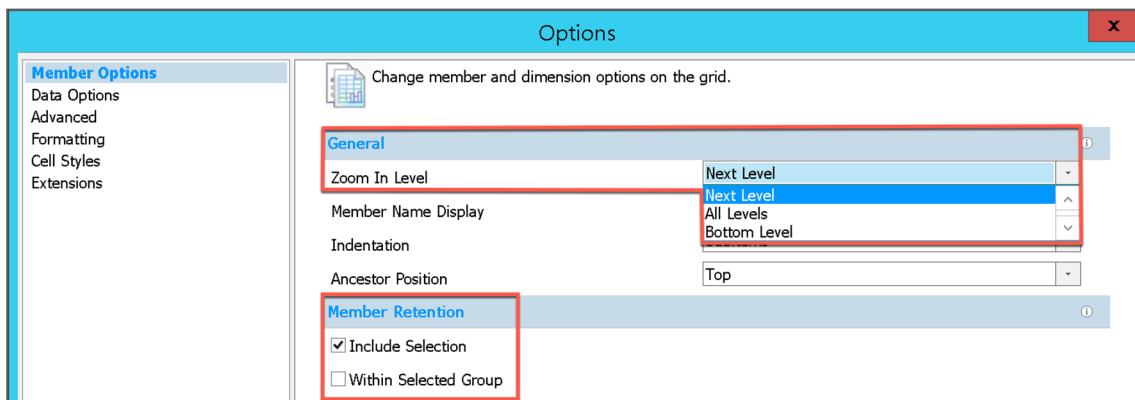
Navigate to **Smart View Ribbon** → **Options** to:

- Refine Zoom and Retentions Options for Drilling into your data
- Suppress data you do not want to view in your grid
- Format your data
- Update the default view



TOPIC 1: HIERARCHY OPTIONS

- **Zoom-In (sets your default zoom type)**
 - **Next Level** to retrieve data for the children of the selected members (default)
 - **All Levels** to retrieve data for all descendants of the selected members
 - **Bottom Level** to retrieve data for the lowest level of members in a dimension
- **Member Retention**
 - **Include Selection** to retain the selected member along with the other members retrieved as a result of the zoom
 - This is enabled by default
 - **Within Selected Group** to apply only to the group of members in which the selection is made
 - This setting is meaningful only when the sheet contains two or more dimensions of data down a sheet as rows or across a sheet as columns



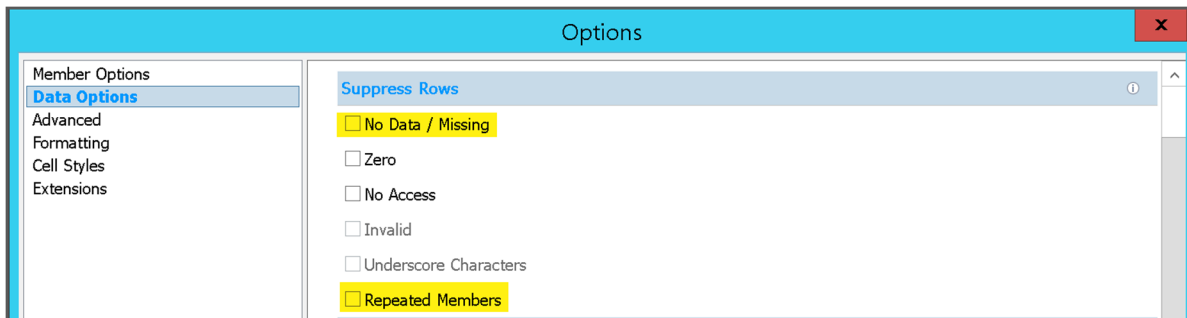
TOPIC 2: SUPPRESS ROW OPTIONS

Suppress Rows

- Check No Data / Missing
- Check Repeated Members

Not Recommended to use theseSuppressions

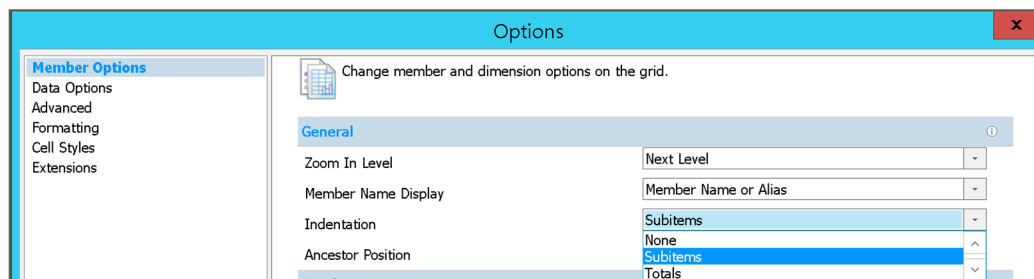
- Zero
- Underscore Characters



TOPIC 3: FORMATTING AND NAVIGATING OPTIONS

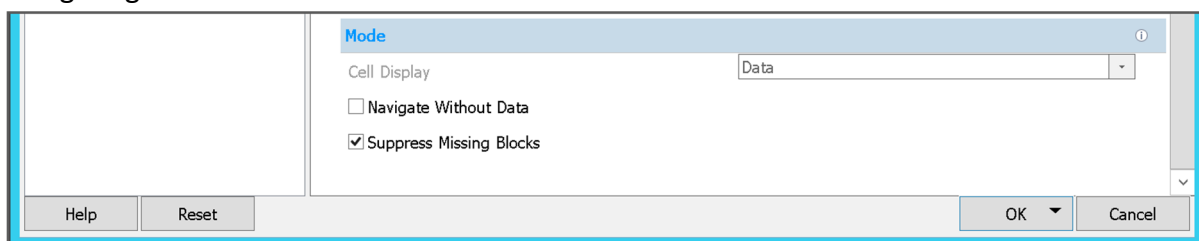
Indentation

- Indenting member names makes it easier to view relationships between members in the spreadsheet



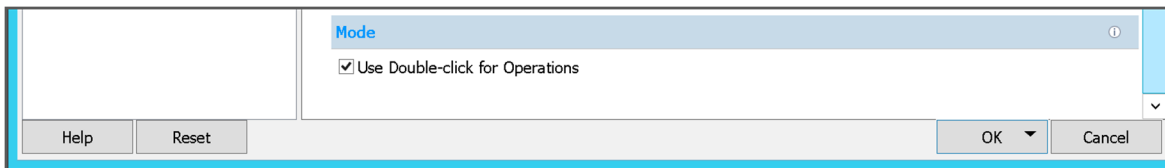
Mode

- Navigating Without Data: **allows you to speed up navigation operations** such as Pivot, Zoom, Keep Only and Remove Only by preventing the calculation of source data while you are navigating



Mode Mouse Options (Advanced tab)

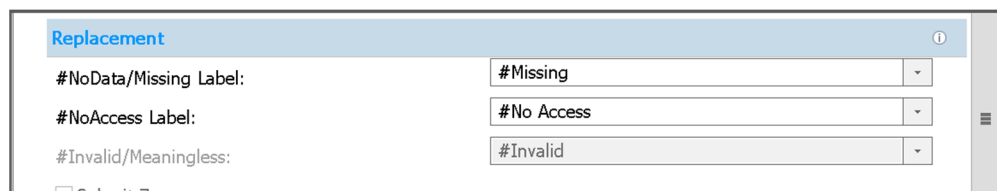
- Use Double Click for Ad Hoc operations
 - Once the grid is refreshed, **double-clicking on members drills down to more detail**



TOPIC 4: DISPLAY OPTIONS

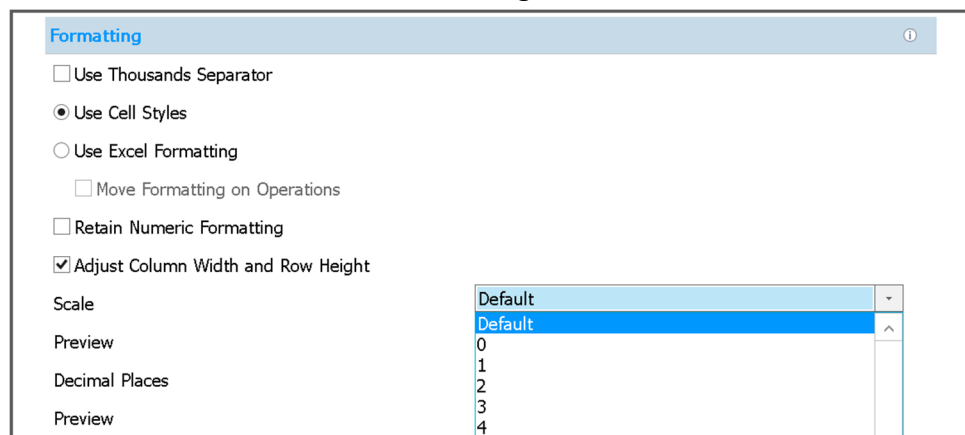
Replacement (Data Options tab)

- By default, Smart View uses text in Excel cells to indicate that the data they contain is missing or invalid, or that you do not have permission to view that data
- Use these boxes to edit this text



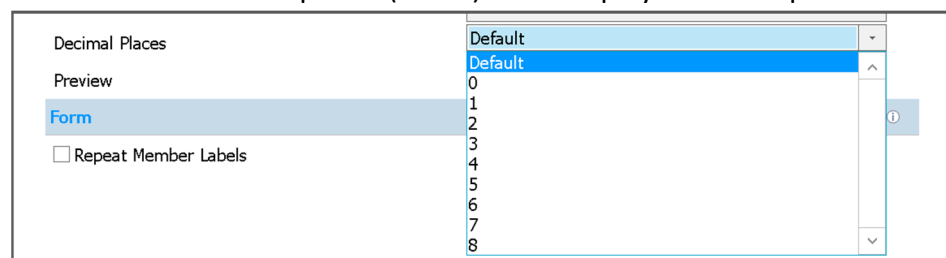
Scale (Formatting tab)

- Select a scale value, or use the default scale assigned



Decimal Places (Formatting tab)

- Select the number of decimal places (0 to 8) to be displayed in the spreadsheet



Excel Formatting can be added to any data cells (Formatting tab)

- If “Use Excel Formatting” is not selected than all custom formatting created by the user will be wiped out or deleted upon refresh
- When you select “Use Excel Formatting” excel formatting will be preserved for data cells only
 - i.e., formatting applied to row and column heading cells is not preserved

A screenshot of a software interface showing a 'Formatting' tab. The tab has a light blue header with the word 'Formatting' in blue text and a small information icon (i) on the right. Below the header, there are three radio button options: 'Use Thousands Separator' (unchecked), 'Use Cell Styles' (checked with a black dot), and 'Use Excel Formatting' (unchecked).

Formatting ⓘ

☐ Use Thousands Separator

☒ Use Cell Styles

☐ Use Excel Formatting

MODULE 6: FINSTMT SMARTVIEW EXERCISES

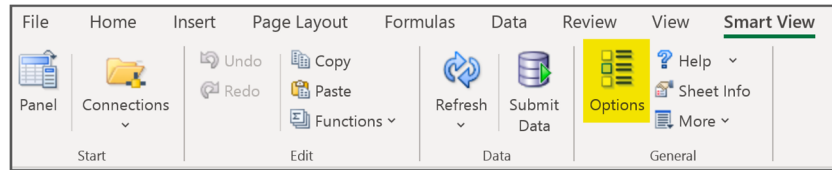
TOPIC 1: HYPERION-SPECIFIC FINSTMT DIMENSIONS

Dimension	Definition
Years	<ul style="list-style-type: none"> The Years dimension represents fiscal years FY20-FY29
Scenario	<ul style="list-style-type: none"> The Scenario dimension corresponds to a class of data, such as: <ul style="list-style-type: none"> Budget: budget data entered in Hyperion is entered in this scenario Actuals: as actuals come in from PeopleSoft, they are stored in this scenario Department Forecast: stores the current year annual forecast entered by department users Multi Year Forecast: the Multi Year forecast scenario will store the five year forecast starting with the budget year Actuals Mapping: supports the new reporting input workflow between RFRO and Hyperion, including the revenue allocation process
Version	<ul style="list-style-type: none"> Working: Budget, Department Forecast, and Actuals Mapping data input from departments and sourced from PSTN Budget Submission: Budget snapshot at the time the department submits its budget Proposed: Snapshot version representing the Proposed version of the budget Adopted: Snapshot version representing the Adopted version of the budget Final: Stores data loaded from PeopleSoft (Actuals, Adjusted Budget) and historical budget and department forecast data
Period	<ul style="list-style-type: none"> YearTotal: Unrounded, sum of the months for all scenarios YearTotal-Working: Unrounded, sum of the months for budget data, plus one-time dollars in approved requests YearTotal-Rounded: YearTotal-Working, rounded for budget data
Request	<ul style="list-style-type: none"> Base: Base budget and where data is loaded for PeopleSoft scenarios (Actuals and Adjusted Budget) Total Request: Base budget plus approved requests. The PeopleSoft version of the budget Total Budget Presentation: Total Request +/- adjustments required for RFRO
Revenue Description	<ul style="list-style-type: none"> A dimension that adds an additional level of detail to the GL revenue accounts. This dimension is specifically used for revenue values only. Expense values are always set to the “No Revenue Description” member in this dimension.
Account	<ul style="list-style-type: none"> Contains the County primary financial account hierarchy (sourced from PeopleSoft) Also contains the County Accountability Ordinance hierarchy Contains FTE stat account members, including Total FTE, Total Full Time and Total Part Time
Department	<ul style="list-style-type: none"> Contains the County primary department hierarchy (sourced from PeopleSoft) Also contains the County Strategic Area rollup If pulling data for the total county, use Total Department, not All Departments

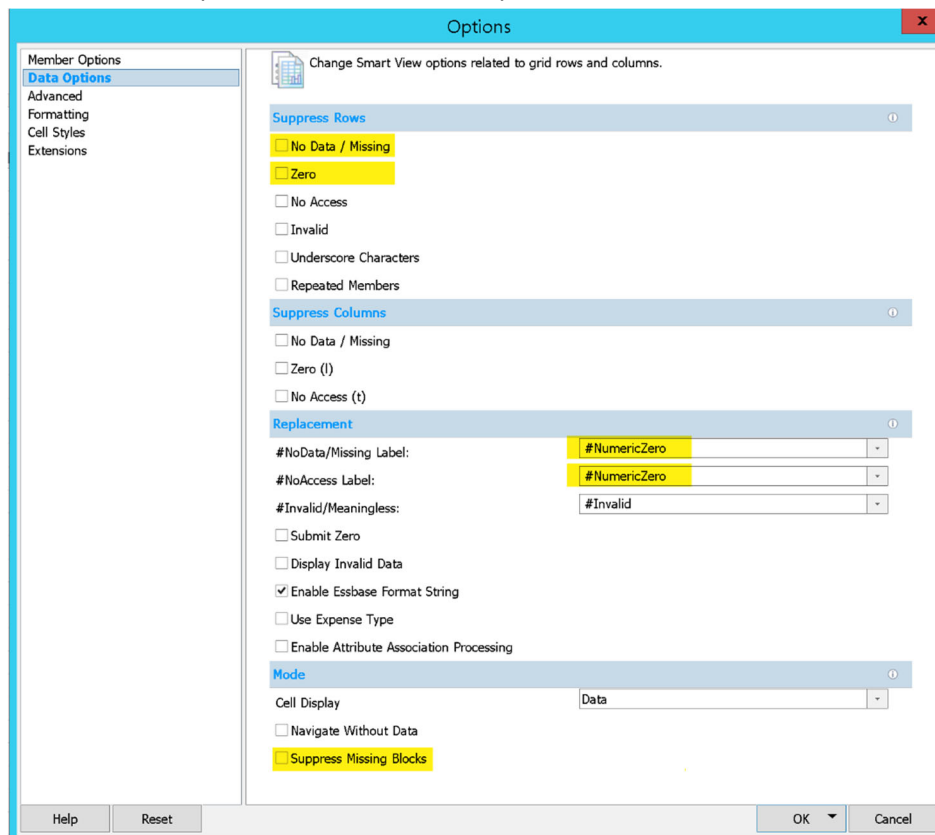
TOPIC 2: EXERCISE 1 – SET UP A DATA QUERY

PART 1: SET UP OPTIONS

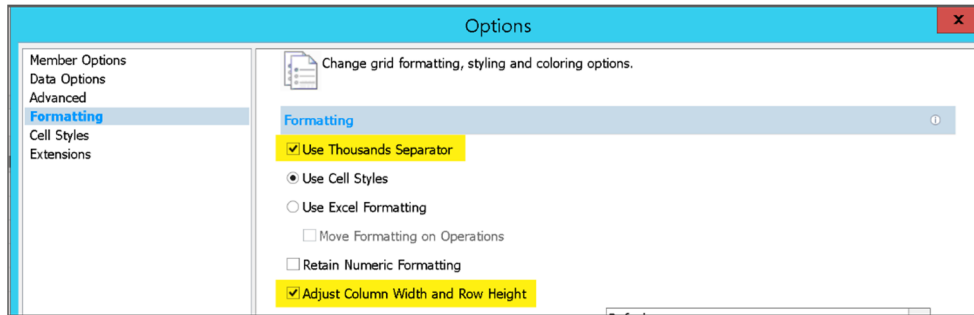
1. Once you have a FINSTMT Ad Hoc Grid opened, click on **Options** in the Smart View Toolbar



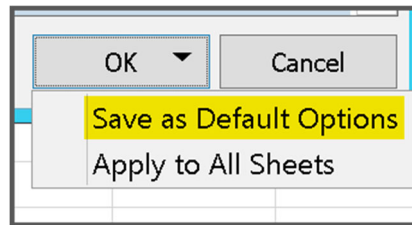
2. Click on **Data Options** on the left-side menu and ensure all Suppress Row options are unchecked and Suppress Missing Blocks is unchecked. Change the No Data and Missing label to numeric zeros (admins do not do this!)



3. Click on the Formatting tab on the left-side menu and check **Use Thousands Separator** and **Adjust Column width and Row Height**



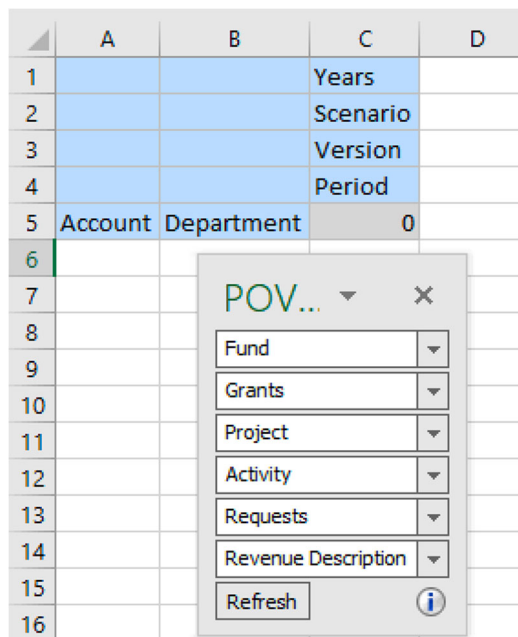
- Click the down arrow next to OK, Select **Save as Default Options**



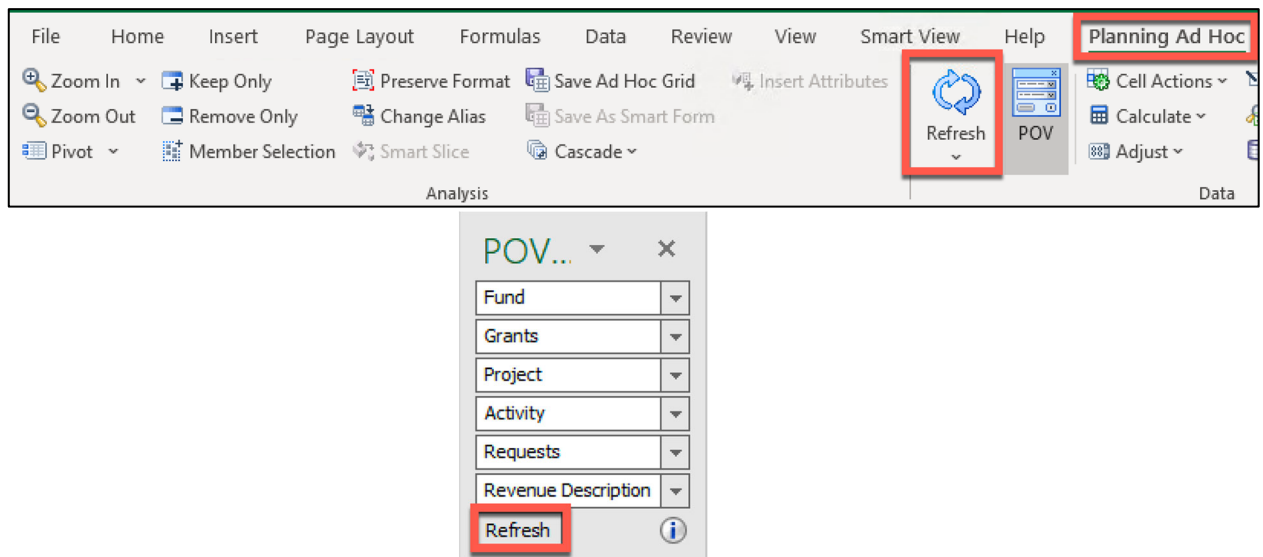
PART 2: ADDING DIMENSIONS TO THE ROWS AND COLUMNS

There are two options for adding Dimension members to columns and rows. Using drag and drop functionality or by inserting a row or column and typing in the Dimension Name.

- Click and drag the down arrow next to the dimension you want to move to the row or column. Drag the **Scenario and Version Dimensions** to the columns and leave the **Account and Department Dimensions** in the rows.

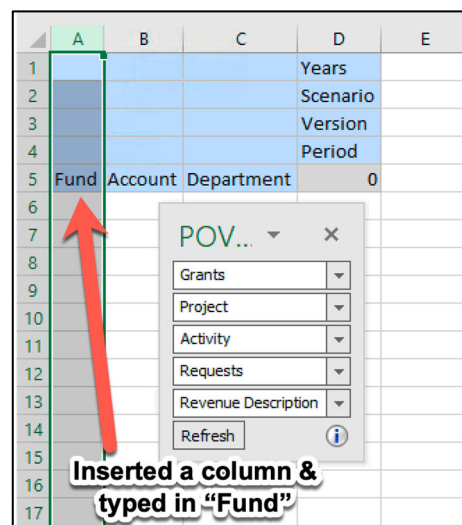


6. Select **Refresh**. (You must refresh after each Ad Hoc Change.)



NOTE: You can also use Excel functionality to insert rows or columns and then type in the dimension name. The dimension name needs to be typed in correctly and each dimension can only be listed once in the rows/columns before you refresh.

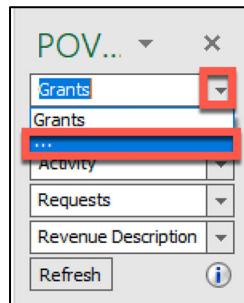
7. Insert a column to the left of Account (Column A). In the blank cell in column A, row 5, type “Fund.” Select **Refresh**.



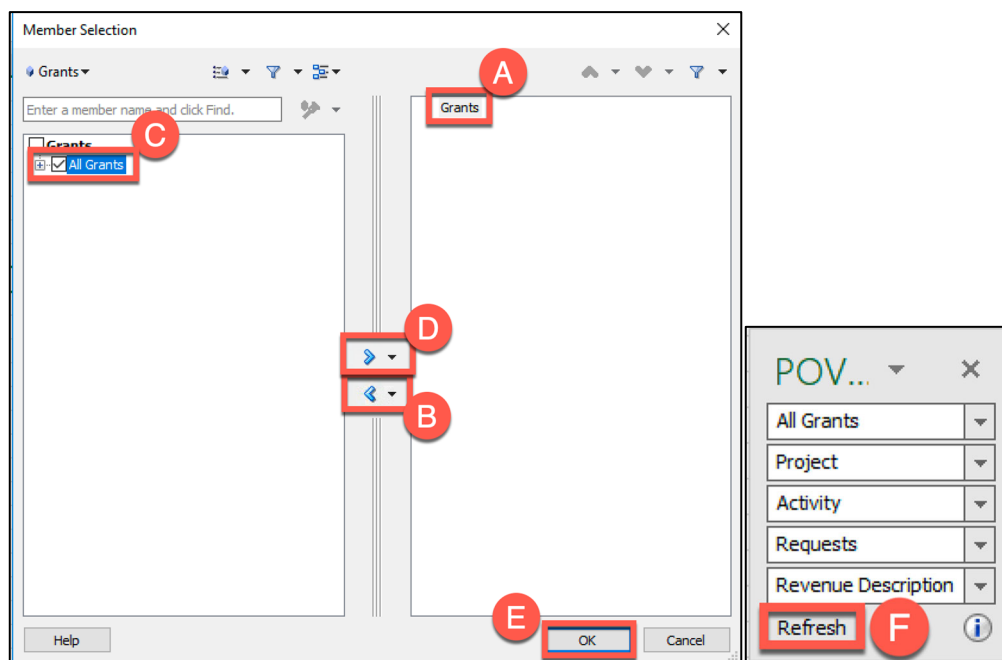
STOP HERE and check expected result!

PART 3: SELECT DIMENSION MEMBERS

8. Select the POV dimension members. Click the drop down next to **Grants** and select “...”



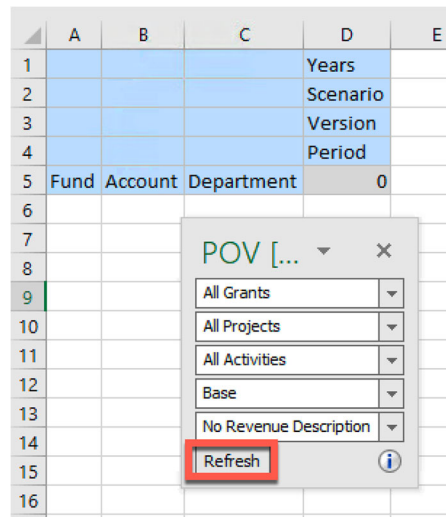
9. The Member Selection Box Appears.
- Select **Grants** in the right side of the member selection box.
 - In the Middle of the member selection box, click the left arrow to remove the top-level dimension member
 - On the left side panel, check the box next to the **All Grants** member.
 - Click the right arrow in the middle of the member selection box.
 - Once the member appears on the right side, click OK in the bottom right corner.
 - Refresh the Ad Hoc Grid.



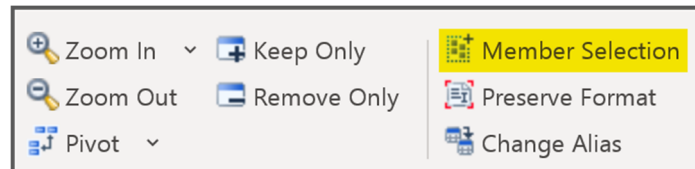
10. Repeat step 9 for each Dimension in the POV until you have all members shown below.
Refresh the Ad Hoc Grid after selecting the members. When completed your Grid and POV toolbar will match the image below.

- Grants: **All Grants**

- Project: **All Projects**
- Activity: **All Activities**
- Requests: **Base**
- Revenue Description: **No Revenue Description**

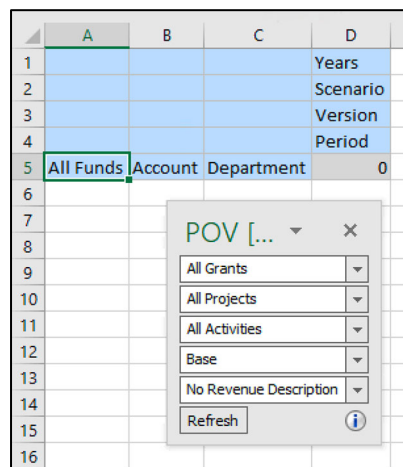


11. Select the row and column dimension members. Click on the **Fund** Dimension cell in the row and then select **Member Selection** from the Planning Ad Hoc Ribbon.



12. Remove Fund from the right side. Click on the check next to the **All Funds** member and add it to the right side of the member selector using the right arrow. Click **OK**.

13. **Refresh** the Ad Hoc Grid.



14. Repeat steps 11 and 12 for all row and column dimensions until your grid looks like the image below.

- A. Year: **FY20**
- B. Scenario: **Actuals Mapping**
- C. Version: **Working**
- D. Period: **YearTotal**
- E. Account: **Total Expenditures** (in the rows)
- F. Department: **Total Department** (in the rows)

15. **Refresh** your grid.

***Note:** you can also type the member name into the cell, but you must type the exact member name or alias. Refresh the Ad Hoc Grid after typing any member names or aliases.

	A	B	C	D
1				2019-20
2				Actuals Mapping
3				Working
4				YearTotal
5	All Funds	Total Expenditures	Total Department	1,350,976,387
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				

POV [...]

All Grants

All Projects

All Activities

Base

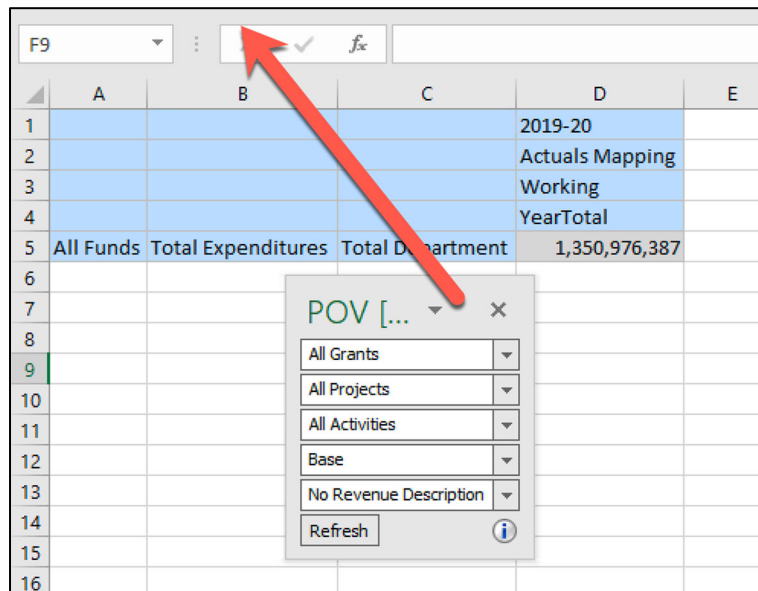
No Revenue Description

Refresh

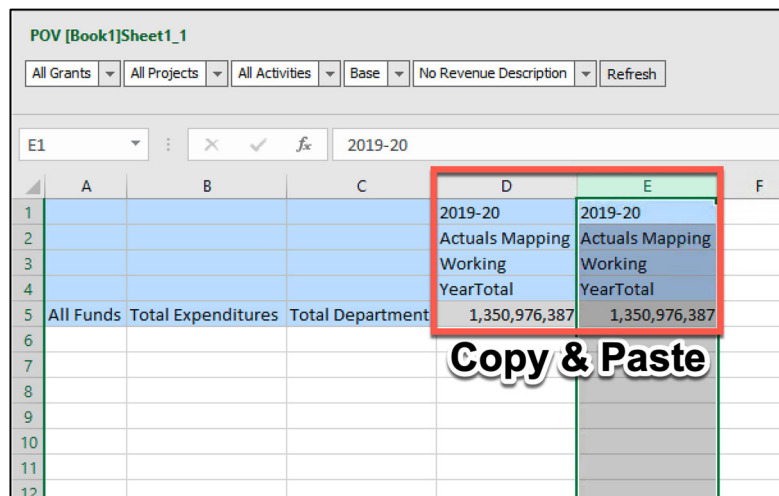
STOP HERE and check expected result!

PART 4: FINAL QUERY SET UP

16. Click above the dimensions in the POV toolbar and drag the POV box above the Excel Formula Bar.



17. Use Excel Functionality to copy and paste the grid column D to the blank column to the right (column E).



18. Manually update the following dimensions in the new column:

- A. Years: FY21
- B. Scenario: Budget
- C. Version: Final

19. **Refresh** the Ad Hoc Grid.

POV [Book1]Sheet1_1

All Grants ▾ All Projects ▾ All Activities ▾ Base ▾ No Revenue Description ▾ Refresh

D16 ✕ ✓ fx

	A	B	C	D	E	F
1				2019-20	2020-21	
2				Actuals Mapping	Budget	
3				Working	Final	
4				YearTotal	YearTotal	
5	All Funds	Total Expenditures	Total Department	1,350,976,387	7,811,326,504	
6						
7						
8						

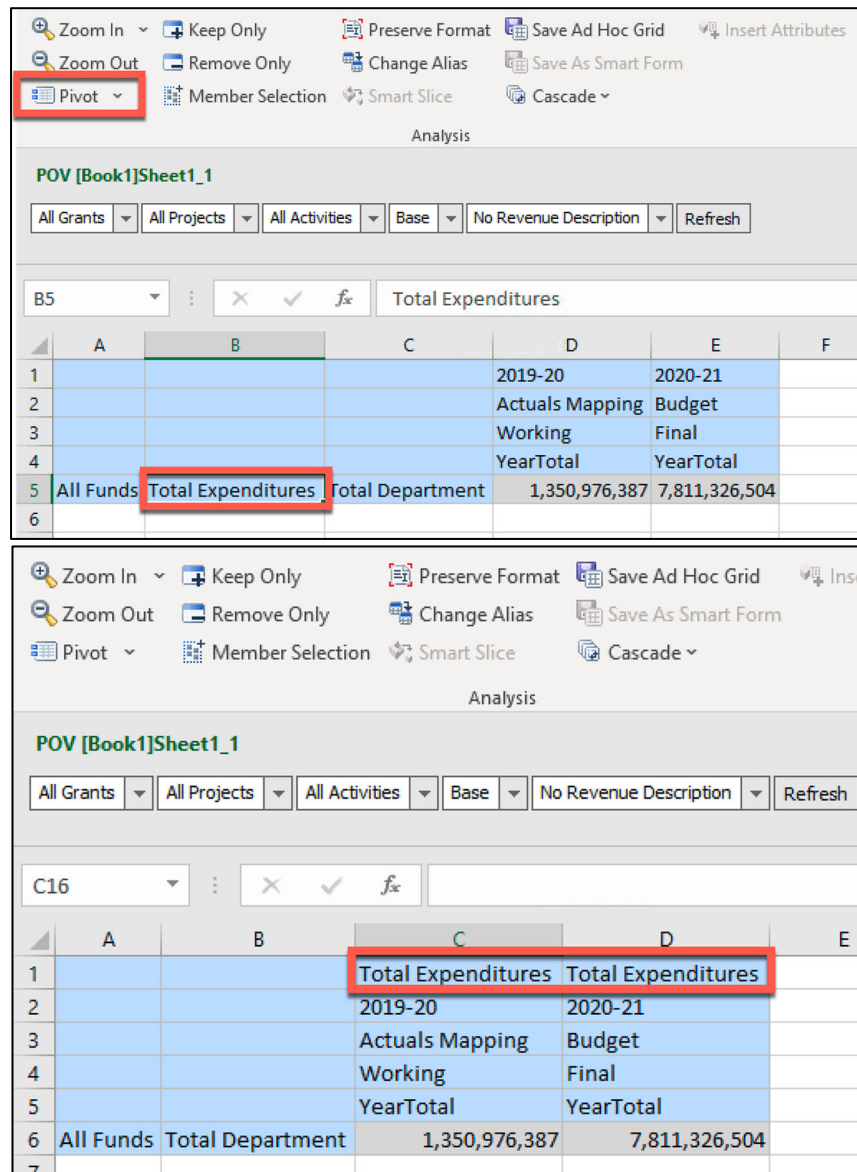
***After Refresh**

STOP HERE and check expected result!

TOPIC 3: EXERCISE 2 – AD HOC FUNCTIONS

PART 1: PIVOT, ZOOM, AND KEEP ONLY FUNCTIONS

1. Navigate to Planning Ad Hoc Ribbon.
2. Click on **Total Expenditures** and then click Pivot in the Menu Bar. Total Expenditures is pivoted to the columns.



The top screenshot shows the SmartView interface with the 'Pivot' button highlighted in the menu bar. The grid displays data for 'All Funds' and 'Total Expenditures'.

	A	B	C	D	E	F
1				2019-20	2020-21	
2				Actuals Mapping	Budget	
3				Working	Final	
4				YearTotal	YearTotal	
5	All Funds	Total Expenditures	Total Department	1,350,976,387	7,811,326,504	
6						

The bottom screenshot shows the result after pivoting. The 'Total Expenditures' is now in the column headers.

	A	B	C	D	E
1			Total Expenditures	Total Expenditures	
2			2019-20	2020-21	
3			Actuals Mapping	Budget	
4			Working	Final	
5			YearTotal	YearTotal	
6	All Funds	Total Department	1,350,976,387	7,811,326,504	
7					

3. Click on **Total Department** then click on **Zoom In** in the Menu Bar. The Department Dimension is zoomed to the next level down in the Hierarchy.

POV [Book1]Sheet1_1

All Grants All Projects All Activities Base No Revenue Description Refresh

B6 Total Department

	A	B	C	D
1			Total Expenditures	Total Expenditures
2			2019-20	2020-21
3			Actuals Mapping	Budget
4			Working	Final
5			YearTotal	YearTotal
6	All Funds	Total Department	1,350,976,387	7,811,326,504
7	All Funds	AD00000000 - ANIMAL SERVICES DEPARTMENT	178,463	29,799,000
8	All Funds	AT00000000 - OFFICE OF THE COUNTY ATTORNEY	6,786,799	21,684,000
9	All Funds	AU00000000 - AUDIT AND MANAGEMENT SERVICES	1,479,092	5,181,000
10	All Funds	BU00000000 - MANAGEMENT AND BUDGET	1,389,560	10,358,000
11	All Funds	CC00000000 - COUNTY COMMISSION	3,095,223	24,477,900
12	All Funds	CH00000000 - COMM.ACTION & HUMAN SRVC. DPT.	48,732,510	36,569,679
13	All Funds	CL00000000 - CLERK OF COURTS	39,643,475	88,467,600
14	All Funds	CR00000000 - CORRECTIONS & REHABILITATION	31,494,703	358,354,200
15	All Funds	CT00000000 - COMMUNICATIONS DEPARTMENT	4,256,843	20,424,000
16	All Funds	CU00000000 - DEPARTMENT OF CULTURAL AFFAIRS	18,079,705	54,004,000
17	All Funds	EC00000000 - COMMISSION ON ETHICS	849,840	2,571,000

4. Select any one Department (containing data) and click **Keep Only** in the Menu Bar. Only the selected Department appears on the rows.

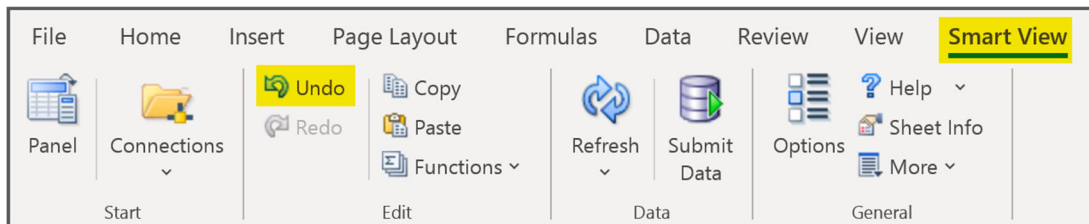
POV [Book1]Sheet1_1

All Grants All Projects All Activities Base No Revenue Description Refresh

B19 FN00000000 - FINANCE DEPARTMENT

	A	B	C	D
1			Total Expenditures	Total Expenditures
2			2019-20	2020-21
3			Actuals Mapping	Budget
4			Working	Final
5			YearTotal	YearTotal
6	All Funds	FN00000000 - FINANCE DEPARTMENT	12,258,250	61,063,000

5. Navigate to Smart View Ribbon. Click **Undo** to undo the last Smart View action.



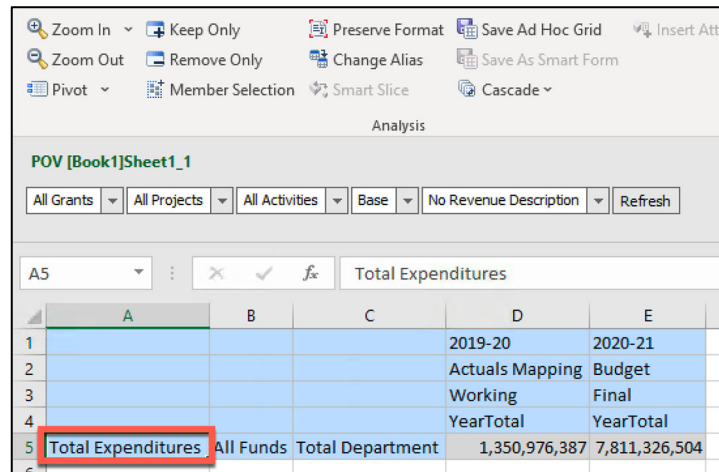
6. Click on **Total Department** and select **Keep Only** in the Planning Ad Hoc Menu Bar. Total Department appears in the row.
7. Click **Total Department** and then click the drop-down next to Zoom In and select **All Levels**. All Levels of the Department Hierarchy are displayed.

	A	B	C	D
1			Total Expenditures	Total Expenditures
2			2019-20	2020-21
3			Actuals Mapping	Budget
4			Working	Final
5			YearTotal	YearTotal
6	All Funds	Total Department	1,350,976,387	7,811,326,504
7	All Funds	AD00000000 - ANIMAL SERVICES DEPARTMENT	178,463	29,799,000
8	All Funds	AD01000000 - OFFICE OF THE DIRECTOR	0	481,500
9	All Funds	AD01010000 - OFFICE OF THE DIRECTOR	0	481,500
10	All Funds	AD02000000 - ADMINISTRATIVE SERVICES	0	2,668,600
11	All Funds	AD02010000 - ADMINISTRATIVE SERVICES	0	2,668,600
12	All Funds	AD02020000 - SUPPORT SERVICES	0	0
13	All Funds	AD02030000 - HUMAN RESOURCES	0	0
14	All Funds	AD02040000 - BUDGET AND FINANCE	0	0
15	All Funds	AD02040100 - BUDGET	0	0
16	All Funds	AD02040200 - ACCOUNTS PAYABLE	0	0
17	All Funds	AD02040300 - ACCOUNTS RECEIVABLE	0	0

8. Navigate to Smart View Ribbon. Click **Undo** to undo the last Smart View action.

STOP HERE and check expected result!

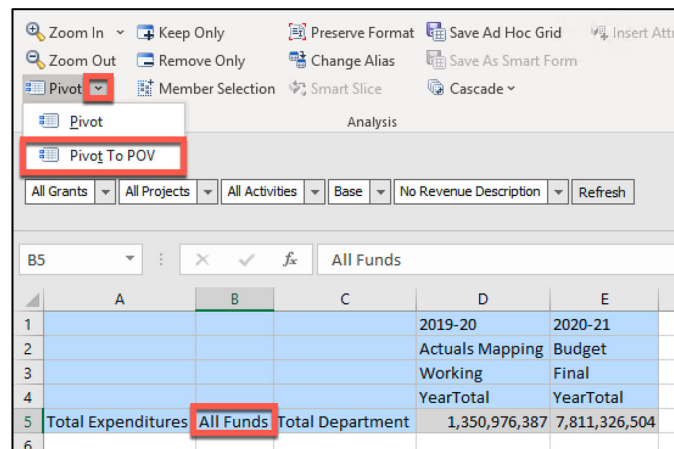
9. Click on **Total Expenditures** and then click Pivot in the Menu Bar. Total Expenditures is pivoted to the rows.



The screenshot shows the SmartView interface with the Pivot menu open. The table structure is as follows:

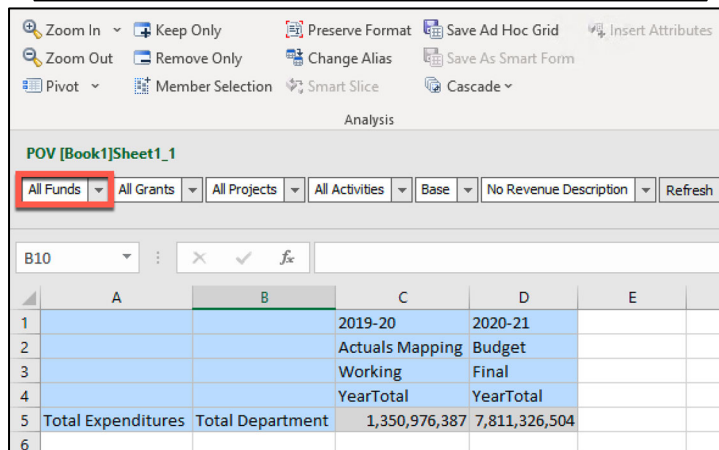
	A	B	C	D	E
1				2019-20	2020-21
2				Actuals Mapping	Budget
3				Working	Final
4				YearTotal	YearTotal
5	Total Expenditures	All Funds	Total Department	1,350,976,387	7,811,326,504

10. Click on the **All Funds** cell and then select **Pivot to POV** from the Pivot drop-down. All Funds dimension is pivoted to the POV.



The screenshot shows the SmartView interface with the Pivot menu open and the 'Pivot to POV' option selected. The table structure is as follows:

	A	B	C	D	E
1				2019-20	2020-21
2				Actuals Mapping	Budget
3				Working	Final
4				YearTotal	YearTotal
5	Total Expenditures	All Funds	Total Department	1,350,976,387	7,811,326,504



The screenshot shows the SmartView interface with the 'All Funds' dimension pivoted to the POV. The table structure is as follows:

	A	B	C	D	E	F
1			2019-20	2020-21		
2			Actuals Mapping	Budget		
3			Working	Final		
4			YearTotal	YearTotal		
5	Total Expenditures	Total Department	1,350,976,387	7,811,326,504		

11. Click on the **Total Expenditures** cell and then select **Zoom In** on the Planning Ad Hoc Menu Bar. Repeat the same steps to zoom in to both **Personnel Costs** and **Other Operating** cells. Expense categories rolling up to Total Expenditures are displayed.

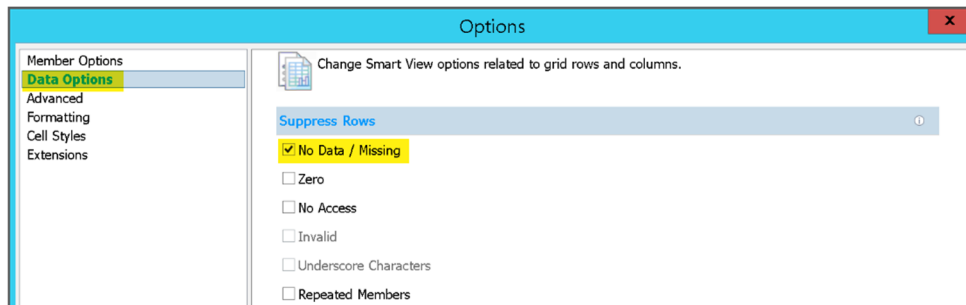
POV [Book1]Sheet1_1

All Funds ▾ All Grants ▾ All Projects ▾ All Activities ▾ Base ▾ No Revenue Description ▾ Refresh

F17

	A	B	C	D
1			2019-20	2020-21
2			Actuals Mapping	Budget
3			Working	Final
4			YearTotal	YearTotal
5	Total Expenditures	Total Department	1,350,976,387	7,811,326,504
6	Personnel Costs	Total Department	687,349,910	2,813,662,338
7	Salaries	Total Department	503,179,496	1,964,440,386
8	Fringes	Total Department	184,170,414	849,221,952
9	Other Operating	Total Department	663,626,477	4,997,664,166
10	Court Costs	Total Department	1,357,797	7,129,100
11	Contractual Services	Total Department	149,542,910	613,586,822
12	Other Operating Costs	Total Department	84,803,029	1,036,253,140
13	Charges for County Services	Total Department	119,074,198	443,501,451
14	Capital	Total Department	48,112,228	505,784,412
15	Grants to Outside Organizations	Total Department	64,722,716	95,376,946
16	Transfers Out	Total Department	70,366,731	1,320,964,992
17	Distribution of Funds in Trust	Total Department	82,765,219	162,652,416
18	Debt Service	Total Department	37,965,086	116,156,800
	Depreciation, Amortization, Depletion	Total Department	0	0
	Reserves	Total Department	1,485	620,083,387
	Intradepartmental Transfers	Total Department	4,915,077	76,174,700

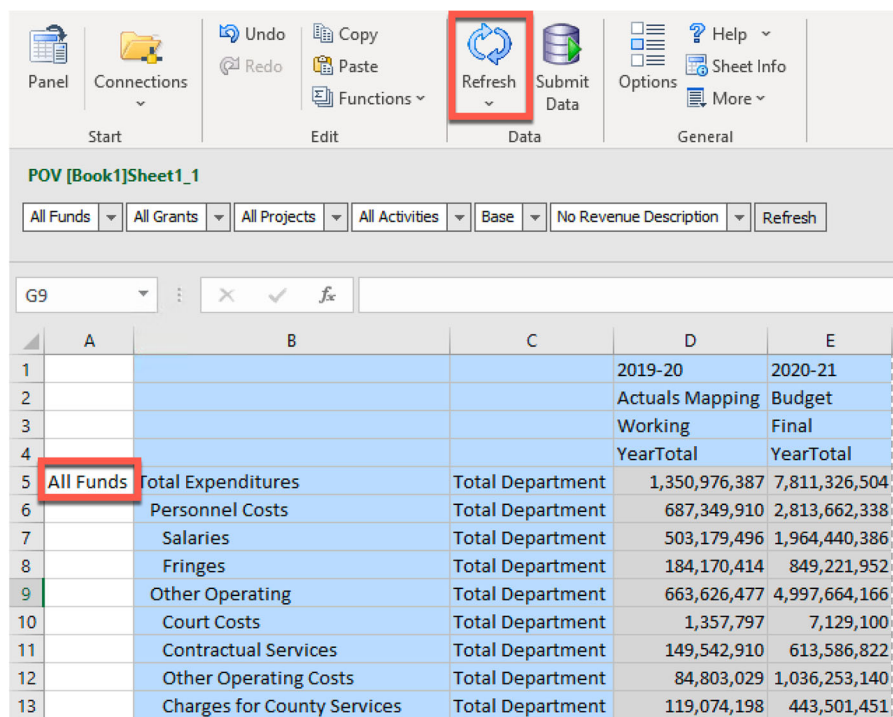
12. Suppress Account members that do not contain data. Navigate to the Smart View Ribbon. Select **Options** and select **Data Options** on the left side panel. Check **No Data / Missing** in the Suppress Rows section and click OK.



13. Click **Refresh** in the Menu Bar. Only Expense categories with data in either column will appear. All other Expense categories are suppressed.

	A	B	C	D
1			2019-20	2020-21
2			Actuals Mapping	Budget
3			Working	Final
4			YearTotal	YearTotal
5	Total Expenditures	Total Department	1,350,976,387	7,811,326,504
6	Personnel Costs	Total Department	687,349,910	2,813,662,338
7	Salaries	Total Department	503,179,496	1,964,440,386
8	Fringes	Total Department	184,170,414	849,221,952
9	Other Operating	Total Department	663,626,477	4,997,664,166
10	Court Costs	Total Department	1,357,797	7,129,100
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12	Other Operating Costs	Total Department	84,803,029	1,036,253,140
13	Charges for County Services	Total Department	119,074,198	443,501,451
14	Capital	Total Department	48,112,228	505,784,412
15	Grants to Outside Organizations	Total Department	64,722,716	95,376,946
16	Transfers Out	Total Department	70,366,731	1,320,964,992
17	Distribution of Funds in Trust	Total Department	82,765,219	162,652,416
18	Debt Service	Total Department	37,965,086	116,156,800
19	Reserves	Total Department	1,485	620,083,387
20	Intradepartmental Transfers	Total Department	4,915,077	76,174,700

14. Pivot All Funds to the rows. Insert a column to the left of the Total Expenditures column. Type **"All Funds"** into the first row, click out of the cell, and select **refresh**.



The screenshot shows the SmartView interface. In the top toolbar, the 'Refresh' button (a circular arrow icon) is highlighted with a red box. Below the toolbar, the 'POV [Book1]Sheet1_1' section shows several dropdown menus: 'All Funds', 'All Grants', 'All Projects', 'All Activities', 'Base', and 'No Revenue Description'. A 'Refresh' button is also present in this section. The main area displays a pivot table with columns A through E. Row 5, column A, contains the text 'All Funds' and is highlighted with a red box. The pivot table data is as follows:

	A	B	C	D	E
1				2019-20	2020-21
2				Actuals Mapping	Budget
3				Working	Final
4				YearTotal	YearTotal
5	All Funds	Total Expenditures	Total Department	1,350,976,387	7,811,326,504
6		Personnel Costs	Total Department	687,349,910	2,813,662,338
7		Salaries	Total Department	503,179,496	1,964,440,386
8		Fringes	Total Department	184,170,414	849,221,952
9		Other Operating	Total Department	663,626,477	4,997,664,166
10		Court Costs	Total Department	1,357,797	7,129,100
11		Contractual Services	Total Department	149,542,910	613,586,822
12		Other Operating Costs	Total Department	84,803,029	1,036,253,140
13		Charges for County Services	Total Department	119,074,198	443,501,451

Panel		Connections		Undo	Copy	Refresh	Submit Data	Options		Help
Start		Edit		Redo	Paste	Data		General		Sheet Info
				Functions						More

POV [Book1]Sheet1_1										
All Grants		All Projects		All Activities		Base	No Revenue Description		Refresh	

G9				
----	--	--	--	--

	A	B	C	D	E
1				2019-20	2020-21
2				Actuals Mapping	Budget
3				Working	Final
4				YearTotal	YearTotal
5	All Funds	Total Expenditures	Total Department	1,350,976,387	7,811,326,504
6	All Funds	Personnel Costs	Total Department	687,349,910	2,813,662,338
7	All Funds	Salaries	Total Department	503,179,496	1,964,440,386
8	All Funds	Fringes	Total Department	184,170,414	849,221,952
9	All Funds	Other Operating	Total Department	663,626,477	4,997,664,166
10	All Funds	Court Costs	Total Department	1,357,797	7,129,100
11	All Funds	Contractual Services	Total Department	149,542,910	613,586,822
12	All Funds	Other Operating Costs	Total Department	84,803,029	1,036,253,140
13	All Funds	Charges for County Services	Total Department	119,074,198	443,501,451

15. Select Total Department cell in the first row. Click the Zoom In drop down on Planning Ad Hoc Ribbon and select **Bottom Level** to drill to the bottom of the Department Dimension.

FileHomeInsertPage LayoutFormulasDataReviewViewSmart ViewHelpPlanning Ad Hoc

Zoom InKeep Only

Next Level

All Levels

Bottom Level

Preserve FormatSave Ad Hoc GridInsert Attributes

Change AliasSave As Smart Form

Smart SliceCascade

Analysis

RefreshPOV

Cell ActionsCalculateAdjust

Data

All GrantsAll ProjectsAll ActivitiesBaseNo Revenue DescriptionRefresh

C5Total Department

	A	B	C	D	E	F	G	H
1				2019-20	2020-21			
2				Actuals Mapping	Budget			
3				Working	Final			
4				YearTotal	YearTotal			
5	All Funds	Total Expenditures	Total Department	1,350,976,387	7,811,326,504			
6	All Funds	Personnel Costs	Total Department	687,349,910	2,813,662,338			
7	All Funds	Salaries	Total Department	503,179,496	1,964,440,386			
8	All Funds	Fringes	Total Department	184,170,414	849,221,952			
9	All Funds	Other Operating	Total Department	663,626,477	4,997,664,166			
10	All Funds	Court Costs	Total Department	1,357,797	7,129,100			
11	All Funds	Contractual Services	Total Department	149,542,910	613,586,822			
12	All Funds	Other Operating Costs	Total Department	84,803,029	1,036,253,140			
13	All Funds	Charges for County Services	Total Department	119,074,198	443,501,451			
14	All Funds	Capital	Total Department	48,112,228	505,784,412			

STOP HERE and check expected result!

MODULE 7: PSTN_RPT SMARTVIEW EXERCISES

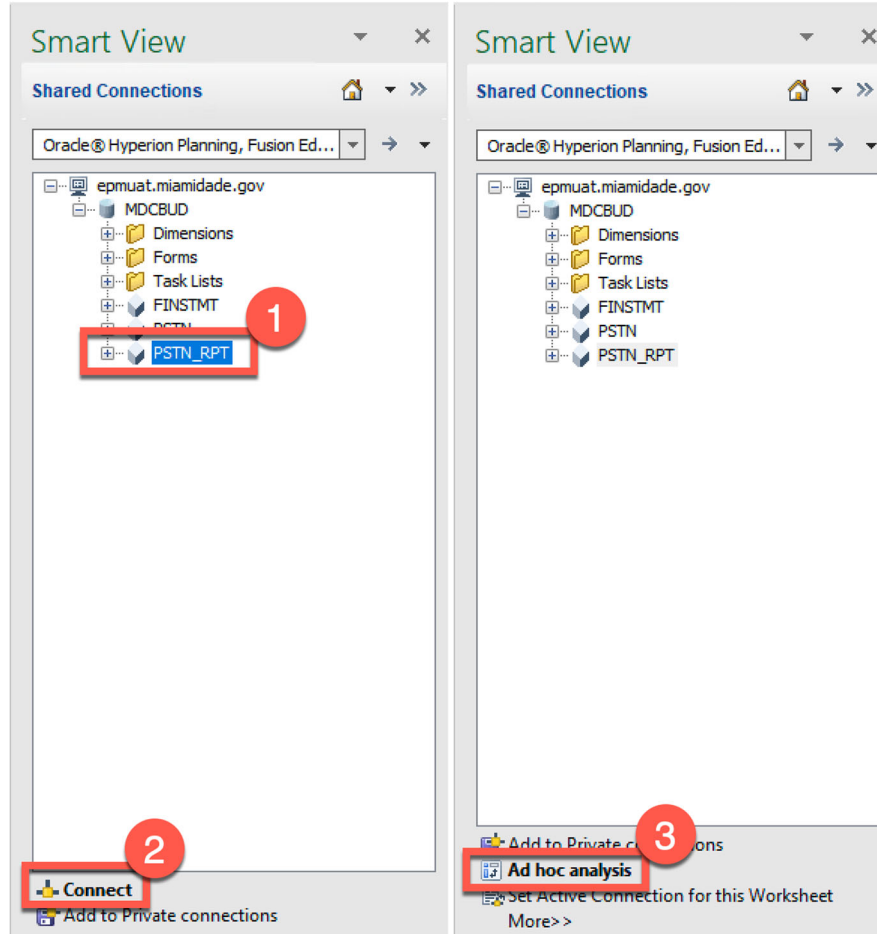
TOPIC 1: HYPERION-SPECIFIC PSTN_RPT DIMENSIONS

Dimension	Member Definitions
Years	<ul style="list-style-type: none"> The Years dimension represents fiscal years FY20-FY29. Only budget year and current year will have data in PSTN_RPT
Scenario	<ul style="list-style-type: none"> The Scenario dimension corresponds to a class of data, such as: <ul style="list-style-type: none"> Budget: budget data entered in Hyperion is entered in this scenario Current Year Personnel Forecast: stores the calculated current year position forecast for the forecast months
Version	<ul style="list-style-type: none"> Working: Budget data sourced from the PSTN database Final: Final budget data from the current year
Period	<ul style="list-style-type: none"> YearTotal: Unrounded, sum of the months
Requests	<ul style="list-style-type: none"> Base: Base budget
Employee	<ul style="list-style-type: none"> Stores all of the Miami-Dade employee records. This is broken up into: <ul style="list-style-type: none"> Total Existing Employees EMPVacancy: Vacancy record for each position
JobCode	<ul style="list-style-type: none"> Categorizes each job code into a Union or Job Code, so users can report on the Union or Job Code
Position	<ul style="list-style-type: none"> Stores all of the Miami-Dade position numbers, new position placeholder members and bucket placeholder members. This is broken up into: <ul style="list-style-type: none"> Total Existing Positions Total New positions Total Buckets
Pay Element	<ul style="list-style-type: none"> Individual pay elements assigned to positions and employees such as: <ul style="list-style-type: none"> Base Salary, Merit, COLA, Pay Components, Retirement, Taxes, etc. Pull FTE_PE if querying FTE data
Account	<ul style="list-style-type: none"> For the PSTN_RPT cube, all financial data will be stored in accounts under “PSTN Sourced Personnel Accounts” Users can pull “Total Expenditures” (Accountability Ordinance Total), but only the accounts sourced from PSTN will have data Contains FTE stat account members, including Total FTE, Total Full Time and Total Part Time
Department	<ul style="list-style-type: none"> Contains the County primary department hierarchy (sourced from PeopleSoft) Also contains the County Strategic Area rollup If pulling data for the total county, use Total Department, not All Departments

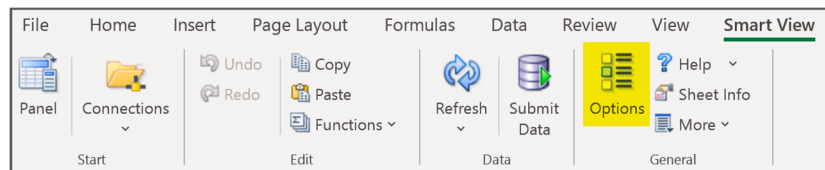
TOPIC 2: EXERCISE 1 – SET UP A DATA QUERY

PART 1: SET UP OPTIONS

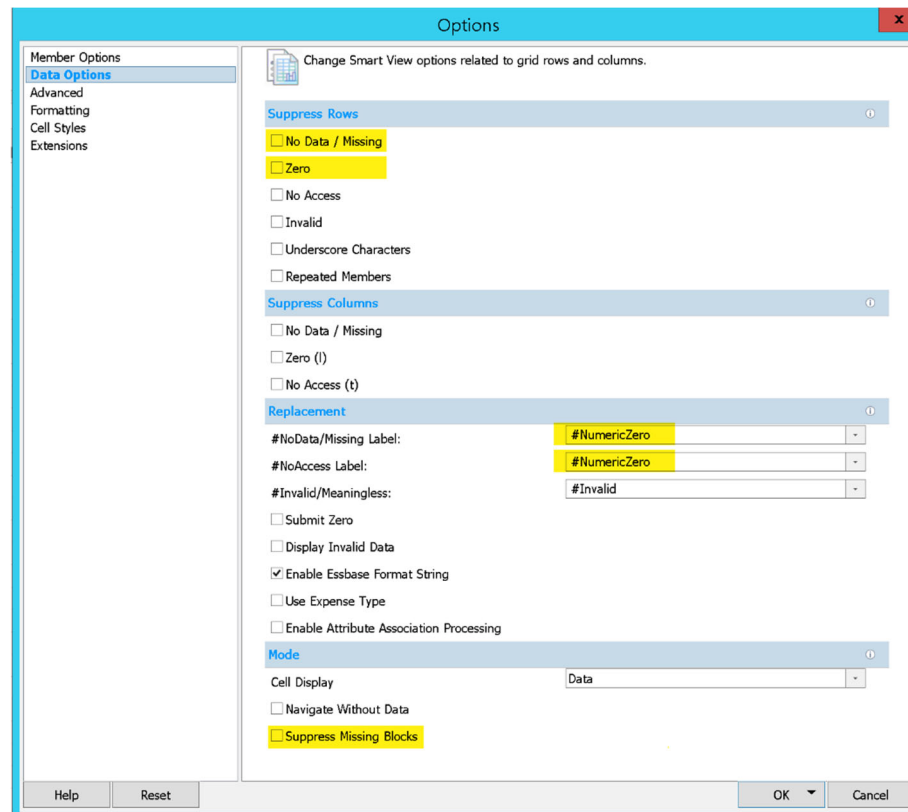
1. Connect to the PSTN_RPT Ad Hoc Grid by navigating to the right-side panel. Select **PSTN_RPT**, then **Connect**, then **Ad Hoc Analysis**.



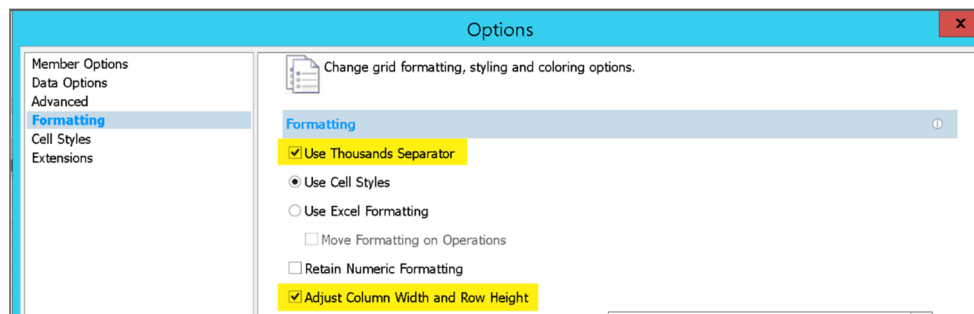
2. Once you have a PSTN_RPT Ad Hoc Grid opened, click on Options in the Smart View Toolbar



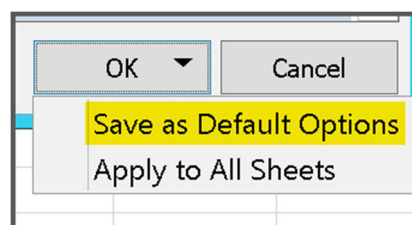
3. Click on **Data Options** on the left-side menu and ensure all Suppress Row options are unchecked and Suppress Missing Blocks is unchecked. Change the No Data and Missing label to numeric zeros (admins do not do this!)



4. Click on the Formatting tab on the left-side menu and check **Use Thousands Separator** and **Adjust Column width and Row Height**



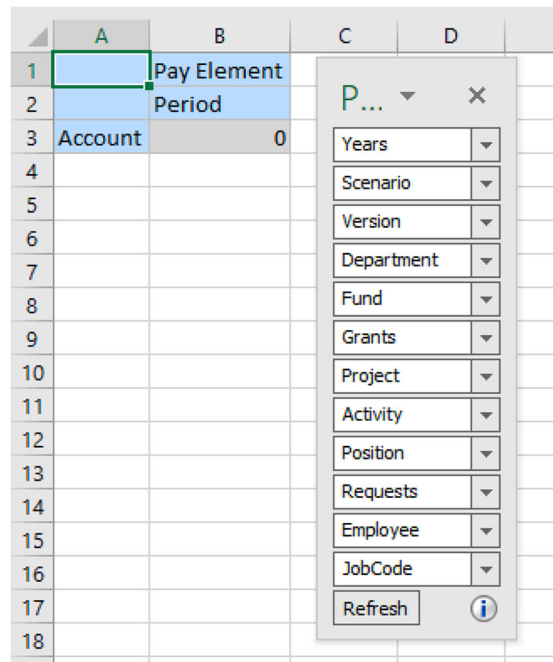
5. Click the down arrow next to OK, Select **Save as Default Options**



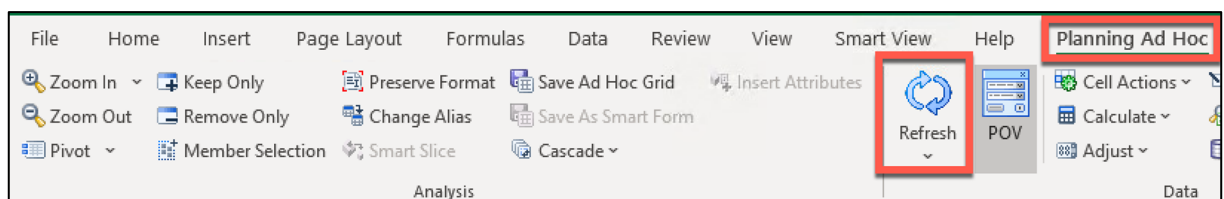
PART 2: ADDING DIMENSIONS TO THE ROWS AND COLUMNS

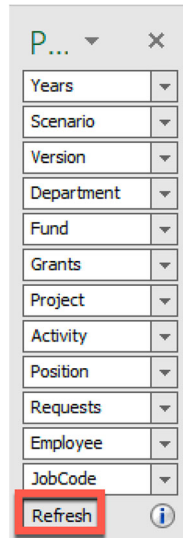
There are two options for adding Dimension members to columns and rows. Using drag and drop functionality or by inserting a row or column and typing in the Dimension Name.

- Click and drag the down arrow next to the dimension you want to move to the row or column. Drag the **Pay Element** dimension into the columns and leave the **Period** dimension in the columns. Also leave the **Account** dimension in the rows.



- Select **Refresh**. (You must refresh after each Ad Hoc Change.)





P... x

Years

Scenario

Version

Department

Fund

Grants

Project

Activity

Position

Requests

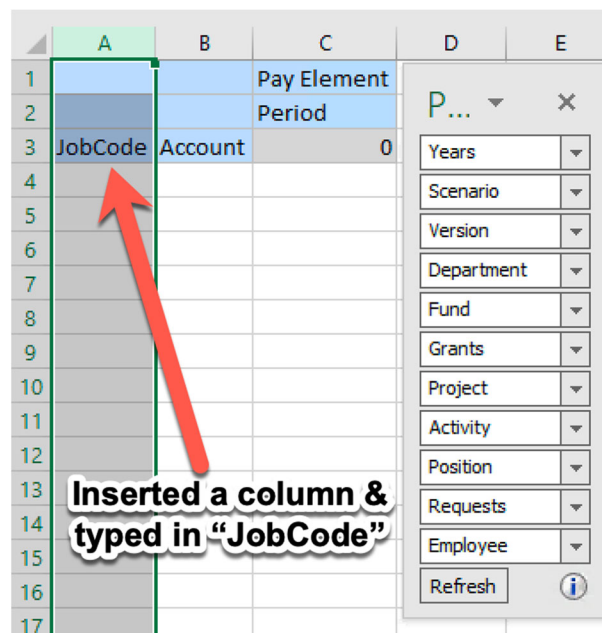
Employee

JobCode

Refresh

NOTE: You can also use Excel functionality to insert rows or columns and then type in the dimension name. The dimension name needs to be typed in correctly and each dimension can only be listed once in the rows/columns before you refresh.

8. Insert a column to the left of Account (Column A). In the blank cell in column A, row 3, type “**JobCode.**” Select **Refresh.**



Inserted a column & typed in “JobCode”

	A	B	C	D	E
1			Pay Element		
2			Period		
3	JobCode	Account	0		
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					

P... x

Years

Scenario

Version

Department

Fund

Grants

Project

Activity

Position

Requests

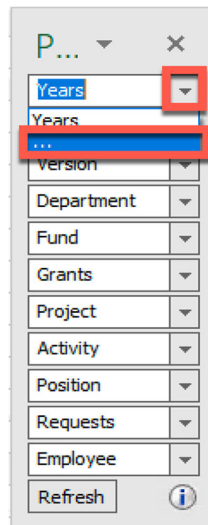
Employee

Refresh

STOP HERE and check expected result!

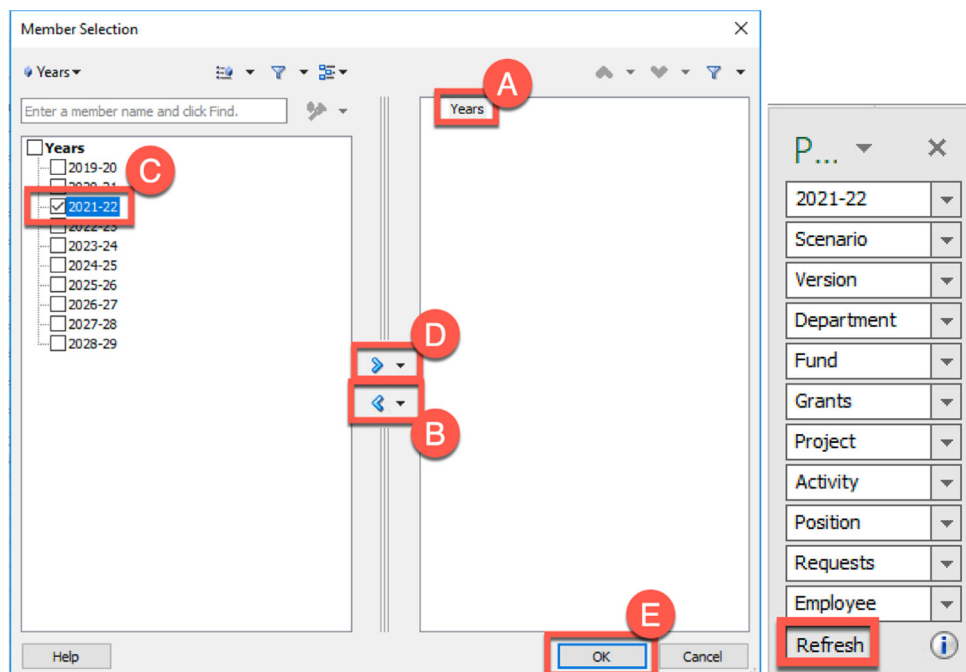
PART 3: SELECT DIMENSION MEMBERS

9. Select the POV dimension members. Click the drop down next to **Years** and select “...”



10. The Member Selection Box Appears.

- Select **Years** in the right side of the member selection box.
- In the middle of the member selection box, click the left arrow to remove the top-level dimension member
- On the left side panel, check the box next to the **2021-22** member.
- Click the right arrow in the middle of the member selection box.
- Once the member appears on the right side, click OK in the bottom right corner.
- Refresh the Ad Hoc Grid.



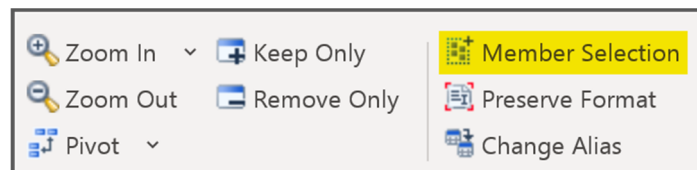
11. Repeat step 9 for each Dimension in the POV until you have all members shown below.

Refresh the Ad Hoc Grid after selecting the members. When completed your Grid and POV toolbar will match the image below.

- Scenario: **Budget**
- Version: **Working**
- Department: **Total Department**
- Fund: **All Funds**
- Grants: **All Grants**
- Project: **All Projects**
- Activity: **All Activities**
- Position: **Total Positions**
- Requests: **Base**
- Employee: **Total Employees**

	A	B	C	D	E
1			Pay Element	PO..	×
2			Period		
3	JobCode	Account	0	2021-22	
4				Budget	
5				Working	
6				Total Department	
7				All Funds	
8				All Grants	
9				All Projects	
10				All Activities	
11				Total Positions	
12				Base	
13				Total Employees	
14				Refresh	
15					
16					
17					

12. Select the row and column dimension members. Click on the **JobCode** dimension cell in the row and then select **Member Selection** from the Planning Ad Hoc Ribbon.



13. Remove **JobCode** from the right side of the panel. Click on the check next to the **Total Job Codes** member and add it to the right side of the member selector using the right arrow. Click **OK**.

14. **Refresh** the Ad Hoc Grid.

15. Repeat steps 12-14 for all row and column dimensions until your grid looks like the image below.

- A. Account: **Total FTE** (in the rows)
- B. Pay Element: **FTE_PE**
- C. Period: **Sep**

16. **Refresh** your grid.

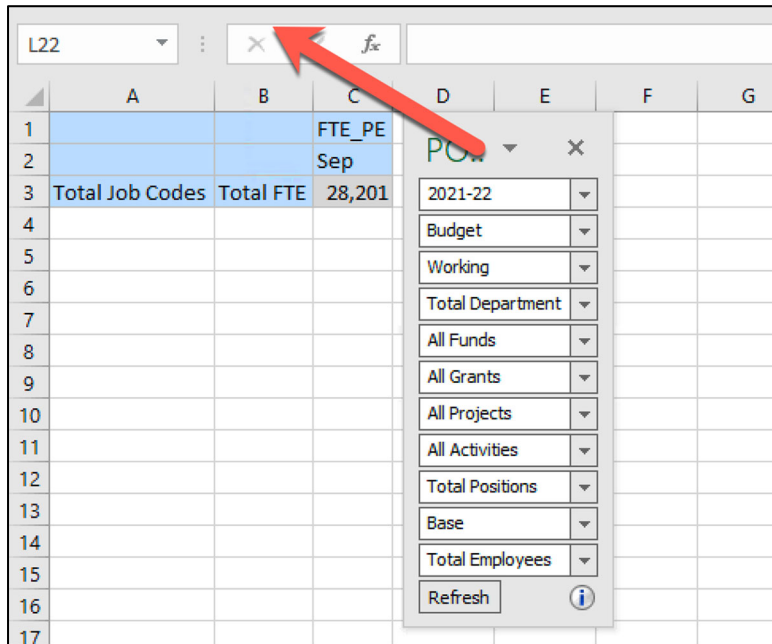
***Note:** you can also type the member name into the cell, but you must type the exact member name or alias. Refresh the Ad Hoc Grid after typing any member names or aliases.

	A	B	C	D	E
1			FTE_PE	PO..	
2			Sep		
3	Total Job Codes	Total FTE	28,201	2021-22	
4				Budget	
5				Working	
6				Total Department	
7				All Funds	
8				All Grants	
9				All Projects	
10				All Activities	
11				Total Positions	
12				Base	
13				Total Employees	
14				Refresh	
15					
16					
17					

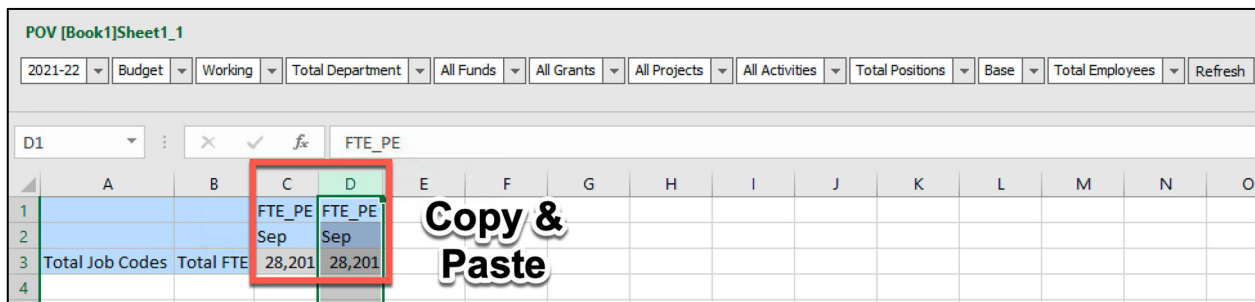
STOP HERE and check expected result!

PART 4: FINAL QUERY SET UP

17. Click above the dimensions in the POV toolbar and drag the POV box above the Excel Formula Bar.



18. Use Excel Functionality to copy and paste the grid column C to the blank column to the right (column D).



19. Manually update the following dimensions in the new column D:

- A. Pay Element: **Total Pay Element**
- B. Period: **YearTotal**

20. **Refresh** the Ad Hoc Grid.

POV [Book1]Sheet1_1

2021-22 Budget Working Total Department All Funds All Grants All Projects All Activities Total Positions Base Total Employees Refresh

D12

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1			FTE_PE	Total Pay Element										
2			Sep	YearTotal										
3	Total Job Codes	Total FTE	28,201	0										
4														

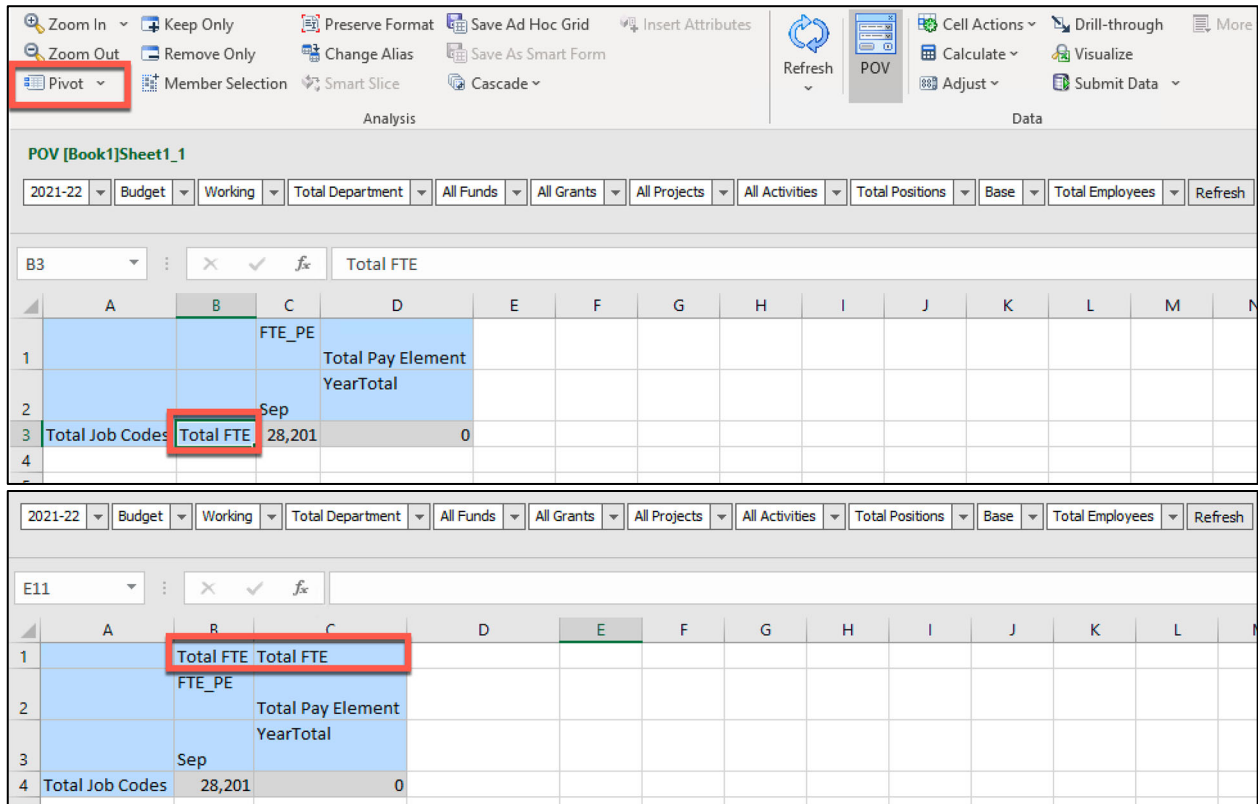
***After Refresh**

STOP HERE and check expected result!

TOPIC 3: EXERCISE 2 – AD HOC FUNCTIONS

PART 1: PIVOT, ZOOM, AND KEEP ONLY FUNCTIONS

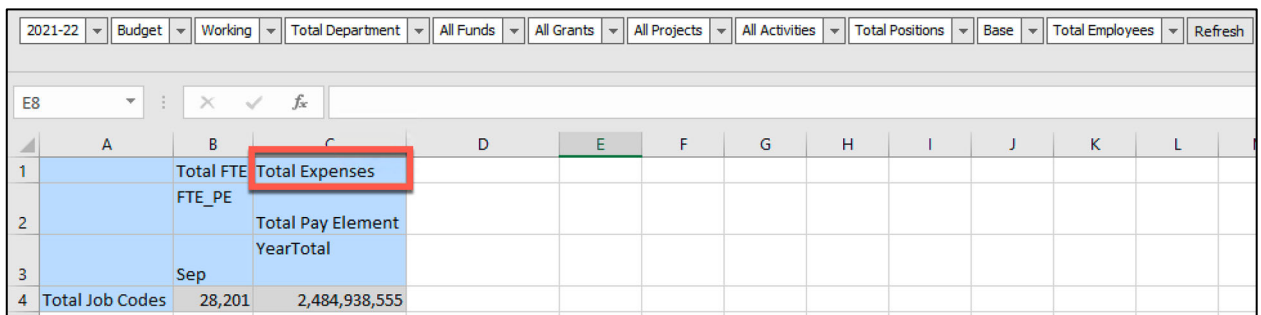
1. Navigate to Planning Ad Hoc Ribbon.
2. Click on **Total FTE** and then click Pivot in the Menu Bar. Total FTE is pivoted to the columns.



The screenshot shows the SmartView interface with the 'Pivot' button highlighted in the menu bar. Below, the grid displays the results of pivoting 'Total FTE' to the columns. The grid is titled 'POV [Book1]Sheet1_1' and shows dimensions for Time (2021-22), Budget (Working), and Analysis (Total Department, All Funds, All Grants, All Projects, All Activities, Total Positions, Base, Total Employees). The grid data is as follows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1			FTE_PE	Total Pay Element										
2			Sep	YearTotal										
3	Total Job Codes	Total FTE	28,201	0										
4														

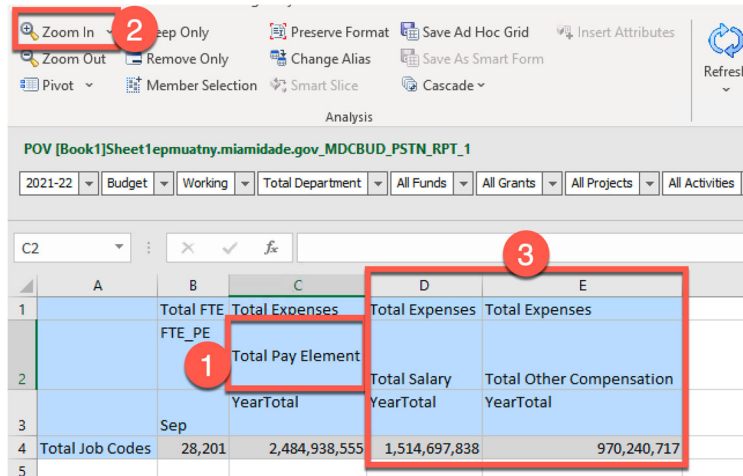
3. Manually update the following dimension in the cell (C,1)
 - A. Account: **Total Expenses**
2. Refresh the Ad Hoc Grid.



The screenshot shows the SmartView interface after updating the dimension in cell C1 to 'Total Expenses'. The grid data is as follows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		Total FTE	Total Expenses											
2		FTE_PE	Total Pay Element											
3		Sep	YearTotal											
4	Total Job Codes	28,201	2,484,938,555											

4. Click on **Total Pay Element** then click on **Zoom In** in the Menu Bar. The Pay Element dimension is zoomed to the next level down in the Hierarchy.



POV [Book1]Sheet1epmuatny.miamidade.gov_MDCBUD_PSTN_RPT_1

2021-22 Budget Working Total Department All Funds All Grants All Projects All Activities

C2

	A	B	C	D	E
1		Total FTE	Total Expenses	Total Expenses	Total Expenses
2		FTE_PE	Total Pay Element	Total Salary	Total Other Compensation
3		YearTotal	YearTotal	YearTotal	YearTotal
4	Total Job Codes	28,201	2,484,938,555	1,514,697,838	970,240,717
5					

5. Zoom into both Total Salary (column D) and Total Other Compensation (column E) by repeating the same process as shown in step 4. (Click on the member, then click on Zoom In)

D	E	F	G	H	I	J	K	L	M
Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses
Total Salary					Total Other Compensation				
	Current Year Salary	Total Merit	Cost of Living Adjustment	Furlough Deduction		Total Additional Earnings	Total Benefits	Total Florida Retirement System Plans	Total Employer Paid Taxes
YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
1,514,697,838	1,484,918,665	14,566,404	15,488,882	-276,113	970,240,717	230,949,527	344,049,676	265,193,655	130,047,859

6. Select the **Total Job Codes** cell in the first row. Click the Zoom In drop down on Planning Ad Hoc Ribbon and select **Bottom Level** to drill to the bottom of the Job Code Dimension.

Zoom In **Keep Only** Preserve Format Save Ad Hoc Grid Insert Attributes Refresh POV Cell Actions Drill-through Calculate Visualize Adjust Submit Data

Analysis Data

POV [Book1]Sheet1epmuatny.miamidade.gov_MDCBUD_PSTN_RPT_1

2021-22 Budget Working Total Department All Funds All Grants All Projects All Activities Total Positions Base Total Employees Re

J13 0

	A	B	C	D	E	F	G
1		Total FTE	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses
		FTE_PE	Total Pay Element	Total Salary	Current Year Salary	Total Merit	Cost of Living Adjustment
2			YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
3		Sep					
4	Total Job Codes	28,201	2,484,938,555	1,514,697,838	1,484,918,665	14,566,404	15,488,882
5	W&S SCADA SUPPORT SPECIALIST - 005646	2	0	0	0	0	0
6	W&S CADASTRAL TECHNICIAN - 005665	28	905,260	587,427	567,898	13,687	5,842
7	W&S CLERK 2 - 005702	2	0	0	0	0	0
8	W&S RECORDS CENTER CLERK 2 - 005707	1	0	0	0	0	0
9	W&S OFFICE SUPPORT SPEC 2 - 005712	6	0	0	0	0	0
10	W&S COMPLAINT INTAKE SPECIAL - 005714	1	0	0	0	0	0
11	W&S SECRETARY - 005719	9	0	0	0	0	0
12	W&S DOCUMENT CTRL SPECIALIST - 005720	2	0	0	0	0	0
13	W&S RECORDS CENTER CLERK 1 - 005722	1	0	0	0	0	0
14	W&S CASHIER 1 - 005725	8	0	0	0	0	0
15	W&S CASHIER 2 - 005726	5	0	0	0	0	0
16	W&S ACCOUNT CLERK - 005728	56	0	0	0	0	0
17	W&S BILLING CLERK - 005732	4	0	0	0	0	0
18	W&S CUSTODIAL WORKER 1 - 005736	5	0	0	0	0	0
19	W&S PARALEGAL COLLECTION SPEC - 005739	1	0	0	0	0	0
20	W&S MICROGRAPHICS TECH 2 - 005746	1	0	0	0	0	0
21	W&S CUSTOMER SERVICE REP 1 - 005748	37	60,897	37,236	36,867	0	369
22	W&S CUSTOMER SERVICE REP 2 - 005749	161	0	0	0	0	0

7. Select any one Job Code (containing data) and click **Keep Only** in the Menu Bar. Only the selected Job Code appears on the rows.

Zoom In **Keep Only** Preserve Format Save Ad Hoc Grid Insert Attributes Refresh POV Cell Actions Drill-through Calculate Visualize Adjust Submit Data

Analysis Data

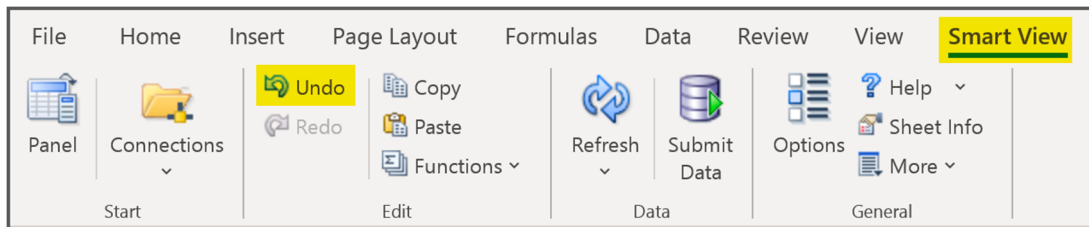
POV [Book1]Sheet1epmuatny.miamidade.gov_MDCBUD_PSTN_RPT_1

2021-22 Budget Working Total Department All Funds All Grants All Projects All Activities Total Positions Base Total Employees Refresh

A6 W&S CADASTRAL TECHNICIAN - 005665

	A	B	C	D	E	F	G	H
1		Total FTE	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses
		FTE_PE	Total Pay Element	Total Salary	Current Year Salary	Total Merit	Cost of Living Adjustment	Furlough Deduction
2			YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
3		Sep						
4	W&S CADASTRAL TECHNICIAN - 005665	28	905,260	587,427	567,898	13,687	5,842	0

8. Navigate to Smart View Ribbon. Click **Undo** to undo the last Smart View action.



9. Click on **Total Job Codes** and select **Keep Only** in the Planning Ad Hoc Menu Bar. Total Job Codes appears in the row.

POV [Book1]Sheet1epmuatny.miamidade.gov_MDCBUD_PSTN_RPT_1

2021-22

Budget

Working

Total Department

All Funds

All Grants

All Projects

All Activities

Total Positions

Base

Total Employees

Refresh

A4

✕

✓

fx

Total Job Codes

	A	B	C	D	E	F	G	H	I
1		Total FTE	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses
		FTE_PE	Total Pay Element	Total Salary					Total Other Compensation
2					Current Year Salary	Total Merit	Cost of Living Adjustment	Furlough Deduction	
3		Sep	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
4	Total Job Codes	28,201	2,484,938,555	1,514,697,838	1,484,918,665	14,566,404	15,488,882	-276,113	970,240,717

STOP HERE and check expected result!

MODULE 8: COURSE SUMMARY

COURSE CONTENT SUMMARY

Congratulations on completing the Hyperion SmartView Training course! Users should now be able to:

- Connect to Smart View
- Set Up a Data Query
- Use Smart View Ad Hoc Functions to Analyze Data