Miami-Dade County



Smart View End User Training Guide

Course Code: HYP.GEN.SV

Course Title: Smart View Training Guide



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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 \rightarrow Options \rightarrow Add Ins. Ensure that the Oracle Smart View for Office extension has been enabled.

Excel Options ? ×								
General	View and manage Microsoft Office Adv	d_inc						
Formulas								
Data	Add-ins							
Proofing	Name 🔦	Location	Туре					
Save	Active Application Add-ins							
	BI Publisher Template Builder for Excel	C:\otNet2007_2\ETBAddIn.vsto vstolocal	COM Add-in					
Language	Hstbar	C:\Oracle\SmartView\bin\HsTbar.xla	Excel Add-in					
Ease of Access	Oracle Smart View for Office	C:\Oracle\SmartView\bin\HsAddin.dll	COM Add-in					
Advanced	Inactive Application Add-ins							
Customize Ribbon	Analysis ToolPak	C:\fice16\Library\Analysis\ANALYS32.XLL	Excel Add-in					
	Analysis ToolPak - VBA	C:\16\Library\Analysis\ATPVBAEN.XLAM	Excel Add-in					
Quick Access Toolbar	Date (XML)	C:\icrosoft Shared\Smart Tag\MOFL.DLL	Action					
Add-ins	Euro Currency Tools	C:\ot\Office16\Library\EUROTOOL.XLAM	Excel Add-in					
	Hyperion® (Hyperion® Smart View recognizer)	C:\Windows\System32\mscoree.dll	Action					
Trust Center	Microsoft Actions Pane 3		XML Expansion Pack					

Select the Smart View Ribbon, then click Options.

File Home	Insert Pa	ge Layout	Formulas	Data	Review	View	Smart View
Panel Connections	🔊 Undo 🎑 Redo	Copy Copy Copy Paste Edit	Refrest s * *	Submir Data	t Options	P Help P Help P Shee ■ Shee ■ More General	t Info

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



Options		×
Member Options	Change global Smart View options.	^
Data Options	General	0
Advanced	Shared Connections URL:	https://epmuat.miamidade.gov/workspace/Smar 👻
Formatting	Number of Undo Actions Number of Most Recently Used items	9 •
Cell Styles	· · · · · · · · · · · · · · · · · · ·	

Save As Default Options.

ОК	 Cancel 				
Save a	Save as Default Options				
Apply	Apply to All Sheets				

Select the Smart View Ribbon, then click Panel.



Click Shared Connections from the panel on the right.



Enter Username and Password. Click Connect.



Connect to Data S	Connect to Data Source ? ×						
User Authentication Needed. Enter correct username and password to sign on.							
User Name:							
Password:							
	Connect Cancel	Details	<<				
URL	https://epmuatny.miamidade.gov/wo	rkspace/Smar	rtView				
Provider	Oracle Enterprise Performance Manag	gement Syste	m Wo				
<			>				

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

Smart View	Ŧ		×
Shared Connections		•	»
Select Server to proceed	Ŧ	÷	Ŧ
Oracle® Hyperion Planning, Fusion E	dition		

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:

- o Open the Options Menu
- o Click on Data Options: ensure that none of the suppression settings are checked
- o Uncheck the Suppression Options
- \circ 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.



File	Home	Insert	Page Layout	Formulas	Data	Review	View	Smart View
Panel	Connections v	C Rede	 Copy Paste Function 	Refree	sh Submit Data	Options	P Help I Help <	× Info ×
	Start		Edit		Data		General	
			Xd hoc grid	Oracle Smart Vie I can not be opened a:	w for Office	l rows of data. OK	×	
				Option	5			×
	Memb Data Advan Forma Cell St Extens	er Options Options ccd titing tyles sions	Suppress Re No Data / Zero No Access Invalid Underscor Repeated Suppress Co Zero (1) No Data / Zero (1) No Access Replacemen #NoData/Mis #NoAccess L #Invalid/Met Display In Ø Enable Es Display In Ø Enable Es Cell Display	ws Missing re Characters Members blumns Missing (f) (t tsing Label: abel: aningless: ero valid Data sbase Format String nse Type tribute Association Processin	#Missing #No Acco #Invalid g			
			Navigate Navigate Suppress	Without Data <mark>Missing Blocks</mark>				~
	He	elp Reset					ок 💌	Cancel
							Save as De Apply to A	efault Options Il Sheets

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.



File	Home	Insert Pa	ge Layout	Form	nulas	Data	Review	View	Smart View
Ê		🖾 Undo	Deste 🕄 🖹		¢			P Help	×
Panel	Connections ~	- Kedo	E Function	is Y	Refresh ~	Submi Data	t Options	🗐 More	×
	Start		Edit		C	ata		General	

s	heet Information	1	×
	Property Connection	Value	^
	Server	epmuat.miamidade.gov	
	Application	MDCBUD	
	Cube	FINSTMT	
	URL	https://epmuat.miamidade.gov/HyperionPlanning/SmartView	
	Provider	Planning	
	Alias Table	Default	
	General		~
	Delete	Save	Close



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.

1	А	В	;	С	D
1				Years	
2				Period	
3	Account	Depart	ment	#Missing	
4					
5				,	
6			PO	/ 🔻	×
7			Scenar	io	-
8			Version	ı	_
9			Fund		
10			Grante		
11			Grants		
12			Project	t	T
13			Activity	У	*
14			Reque	sts	-
15			Reven	ue Descriptio	n 👻 📃
16			Refres	h	
17					•





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.

1	А		В	С	D
1				Years	
2				Period	
3	Account	Depar	tment	#Missing	
4					
5			DOI	,	
6			PO	/ ▼	
7			Scenar	io	-
8			Version	1	•
9			Fund		_
10			Grante		
11			Grants		÷ i i i i i i i i i i i i i i i i i i i
12			Project	t	–
13			Activit	У	*
14			Reque	sts	-
15			Reven	ue Description	· •
16			Refres	h	
17					



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.

	А	В	С	D
1			Years	
2			Period	
3	Account	Department	#Missing	
4				
5			,	
6		POV	V 🔻	×
7		Scenar	rio	-
8		Scenari	in	
9				
10		Cont		
11		Grants		T
12		Projec	t	T
13		Activit	у	-
14		Reque	sts	+
15		Reven	ue Descriptio	n 👻
16		Refres	h	
17				
10				



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 <u>exact name</u> 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.

File	Hom	e Insert	Page Layout	Formulas	Data	Review	View	Smart View	Help	Planning Ad Hoc
🕀 Zoon	n In 👻	耳 Keep Only	📑 Preserv	e Format 🗄	Save Ad Ho	c Grid 🛛 🖗	🖡 Insert Attri	ibutes	×	🐯 Cell Actions 🗠 🏌
🔍 Zoon	n Out	🚍 Remove Only	📲 Change	Alias 🛛 🖶	Save As Smi	art Form		Pofroch	DOV	📅 Calculate 🗸 🛛 🤞
💷 Pivot	×	Member Selec	tion 🔄 Smart S	lice 🛛 🕞 (Cascade ~			v v	POV	🕮 Adjust 🗠 🛛 🚺
			A	nalysis						Data

Zoom In:

- Option 1:
 - o Select Dimension Cell
 - o Click Zoom In, or Select the drop-down arrow for different levels
- Option 2:
 - o Select Dimension Cell
 - o 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)

File	Home I	nsert Page	Layout	Formulas	Data	Review	View	Smart Viev	v Help	Planni	ng Ad Hoo	С
€, z	Coom In ∨ ∓ Kee <u>N</u> ext Level <u>A</u> II Levels <u>B</u> ottom Level	ep Only love Only nber Selection	Preserve F Change A Change A Change A Ana	Format 🔂 S Alias 🖼 S ce 🌚 G Iysis	Save Ad Hoo Save As Sma Cascade ~	t Grid	Insert Attrik	Ref	resh POV	E Cell Calc B Calc	Actions ~ culate ~ ust ~ Data	N, Æ
PUV	ι ισοκι]sneeτι_ι											
All F	unds 🔻 All Grants	▼ All Projects	✓ All Activiti	ies 🔻 Base	All Rev	venue Descript	tions 🔻 Re	efresh				
B5	• :	× ~ f	- Total	Account								
B5		×	Total	Account D	E	F	G	Н	I	J	К	
B5	* : A	× ✓ <i>f</i>	C 2020-21	Account D	E	F	G	Н	I	J	К	
B5	₹ : A	× v f	Total C 2020-21 Budget	Account D	E	F	G	н	1	J	К	
B5 1 2 3	▼ :	× √ ƒ	 Total C 2020-21 Budget Working 	Account D	E	F	G	Н		J	К	
B5	✓ : A	× ✓ f	Total C 2020-21 Budget Working YearTotal	Account D	E	F	G	Н		J	K	
B5 1 2 3 4 5	▼ : A otal Department	X X f	Total C 2020-21 Budget Working YearTotal #Missing	Account	E	F	G	Н		J	K	



Zoom Out:

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

€ 0	Zoom In 👻 📮 Kee Zoom Out 📮 Ren Pivot 👻 📑 Mee	p Only nove Only mber Selection) 11日 11日 11日 11日 11日 11日 11日 11日 11日 11	Preserve Fo Change Al Smart Slice	ormat ias	ि Si चि Si ि C
				Analy	/sis	
P	OV [Book1]Sheet1_1					
A	l Funds 👻 All Grants	▼ All Projects	-	All Activitie	es 🔻	Base
BS	5 🔻 :	× 🗸 j	f _{se}	Total A	Accou	nt
	А	В		с	D	
1			20)20-21		
2			В	udget		
3			W	orking/		
4			Ye	earTotal		
5	Total Department	Total Account	t #M	Vissing		
6						

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.**

Fil	e Home Ir	isert Page I	.ayout	Formulas	Da	ita Review	View	Smar	t View	Help	Planning Ad Ho	oc
€ 0⁄	Zoom In 👻 🗔 Kee Zoom Out 🛛 🚍 Ren Pivot 👻 📑 Mer	p Only nove Only mber Selection	Change A	iarmat 🖬 Sa lias 🕞 Sa e 🕼 Ca	ve A ve A iscad	d Hoc Grid 🤤 s Smart Form de 🗸	Insert Attr	ibutes	Refresh	POV	Cell Actions ~ Calculate ~ Adjust ~	· 1
			Ana	lysis							Data	a
РО	V [Book1]Sheet1_1					Smart View				×		
All	Funds 👻 All Grants	▼ All Projects	- All Activiti	es 🔻 Base	-	Select alias tab	ole:					
						None Alias table v	vill not be use	ed				
B5	*	$\times \checkmark f_3$	Total	Account	_							
	А	В	С	D		Default					J K	
1			2020-21			SLAliases	;					
2			Budget									
3			Working						_			
4			YearTotal							Cancel		
1 2 3 4	A	B	C 2020-21 Budget Working YearTotal	D		➔ SLAliases	;			Cancel		



MODULE 5: SMARTVIEW OPTIONS

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

Navigate to Smart View Ribbon → Options to:

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



TOPIC 1: HIERARCHY OPTIONS

- Zoom-In (sets your default zoom type)
 - o Next Level to retrieve data for the children of the selected members (default)
 - o 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

		Options	X
Member Options Data Options Advanced	Change member and dir	nension options on the grid.	
Formatting	General		0
Extensions	Zoom In Level	Next Level	-
	Member Name Display	Next Level All Levels	^
	Indentation	Bottom Level	
	Ancestor Position	Тор	•
	Member Retention		<u>(</u>)
	✓ Include Selection		
	Within Selected Group		



TOPIC 2: SUPPRESS ROW OPTIONS

Suppress Rows

- Check No Data / Missing
- Check Repeated Members

Not Recommended to use these Suppressions

- o Zero
- o Underscore Characters

	Options		×
Member Options Data Options	Suppress Rows	()	^
Advanced Formatting	No Data / Missing		
Cell Styles			
Extensions			

TOPIC 3: FORMATTING AND NAVIGATING OPTIONS

Indentation

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

	Optic	ons	x
Member Options Data Options Advanced	Change member and dimension	options on the grid.	
Formatting	General		0
Extensions	Zoom In Level	Next Level	-
	Member Name Display	Member Name or Alias	-
	Indentation	Subitems	
	Ancestor Position	None	^
	Mambar Datastics	Totals	× _

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					
		Cell Display	Data			•	
		Navigate Without Data					
		✓ Suppress Missing Blocks					
							~
Help	Reset			ОК	•	Cancel	



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

		Mode				
		✓ Use Double-click for Operations				
						~
Help	Reset		ОК	•	Cancel	

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

Replacement		
#NoData/Missing Label:	#Missing	-
#NoAccess Label:	#No Access	· · · · ·
#Invalid/Meaningless:	#Invalid	·

Scale (Formatting tab)

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

Formatting		0			
Use Thousands Separator					
● Use Cell Styles					
\bigcirc Use Excel Formatting					
Move Formatting on Operations					
Retain Numeric Formatting	Retain Numeric Formatting				
✓ Adjust Column Width and Row Height					
Scale	Default	-			
Denviou	Default	^			
Preview	1				
Decimal Places	2				
Preview	3 4				

Decimal Places (Formatting tab)

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

Decimal Places	Default	~]	
Preview	Default 0	^		
Form	1 2		(j)	
Repeat Member Labels	3 4			
	5 6			
	7 8	~		



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
 - \circ $\,$ i.e., formatting applied to row and column heading cells is not preserved

Formatting	0
Use Thousands Separator	
● Use Cell Styles	
◯ Use Excel Formatting	



MODULE 6: FINSTMT SMARTVIEW EXERCISES

TOPIC 1: HYPERION-SPECIFIC FINSTMT DIMENSIONS

Dimension	Definition
Years	The Years dimension represents fiscal years FY20-FY29
Scenario	 The Scenario dimension corresponds to a class of data, such as: 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	 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	 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	 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	• 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	 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	 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!)

	Options						
Member Option Data Options Advanced	S	Change Smart View options related to grid rows and columns.					
Formatting		Suppress Rows					
Cell Styles Extensions		No Data / Missing Zero		-			
		Underscore Characters					
		Repeated Members					
		Suppress Columns					
		No Data / Missing					
		□ Zero (I)					
		□ No Access (t)					
		Replacement					
		#NoData/Missing Label: #NumericZero	*				
		#NoAccess Label: #NumericZero	*				
		#Invalid/Meaningless: #Invalid	*				
		Submit Zero					
		Display Invalid Data					
		✓ Enable Essbase Format String					
		Use Expense Type					
		Enable Attribute Association Processing					
		Mode					
		Cell Display Data	-				
		Navigate Without Data					
		Suppress Missing Blocks					
Help	Reset		OK 🔻 Cano	cel			

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



Options					
Member Options Data Options Advanced	Change grid formatting, styling and coloring options.				
Formatting Cell Styles Extensions	Formatting	0			
	Use Cell Styles Use Evrel Formatting				
	Move Formatting on Operations				
	Retain Numeric Formatting Adjust Column Width and Row Height				

4. 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.

	А	В	С	D
1			Years	
2			Scenario	
3			Version	
4			Period	
5	Account	Department	0	
6				
7		POV.	. 👻 🔅	×
8		Fund		-
9		Tana		
10		Grants		_
11		Project		*
12		Activity		-
13		Requests		•
14		Revenue	Description	T
15		Refresh		<u>i</u>
16				





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.

	А	В	с	D	E
1				Years	
2				Scenario	
3				Version	
4				Period	
5	Fund	Account	Department	()
6					
7	1		POV 🔻	×	
8			Grants	-	
9					
10			Project	-	
11			Activity	-	
12			Requests	-	
13			Revenue Descript	tion 👻	
14			Refresh		
15	Inc	orted	a aalumn	<u>م</u>	
16	ms	seried		œ	
17		typed i	n "Fund"		

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 "..."

POV :	ĸ
Grants	-
Grants	
ACUVITY	
Requests	-
Revenue Description	-
Refresh	1

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



- 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.

					_
	А	В	С	D	
1				Years	
2				Scenario	
3				Version	
4				Period	
5	All Funds	Account	Department	0	
6					
7		D	- IVO	× 1	
8		P I	Ον [·		
9		All	Grants	*	
10		All	Projects	*	
11		All	Activities	*	
12		Ba	se		
13		No	Pavanua Descrir	ation -	
14			Revenue Descrip		
15		Re	fresh		
16					



- 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.

	Α	В		С		D
1						2019-20
2						Actuals Mapping
3						Working
4						YearTotal
5	All Funds	Total Expendite	ures	Total Departme	nt	1,350,976,387
6		[
7			PC	DV [🔻	×	
8				-	_	1
9			Aire	andrus	· ·	
10			AILP	rojects		
11			All A	Activities	*	
12			Bas	e	-	
13			No	Revenue Description	-	1
14			Ref	resh		
15					0	

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).

POV [Book1]Sheet1_1								
A	ll Grants 👻	All Projects 👻 All Activ	vities 👻	Base	- N	o Revenue Description	▼ Refresh	
E1	L	• : × ~	f_{x}	2019-	20			
	А	В	1	с		D	E	F
1						2019-20	2019-20	
2						Actuals Mapping	Actuals Mapping	
3						Working	Working	
4						YearTotal	YearTotal	
5	All Funds	Total Expenditures	Total D	Depart	ment	1,350,976,387	1,350,976,387	
6						Conv	Posto	
7						Copy c	* Faste	
8						00		
9								
10								
11								
12								

- 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.



PO	POV [Book1]Sheet1_1						
A	All Grants 💌 All Projects 💌 All Activities 💌 Base 💌 No Revenue Description 💌 Refresh						
D	D16 \checkmark : $\times \checkmark f_x$						
	А	В	С	D	E	F	
1				2019-20	2020-21		
2				Actuals Mapping	Budget		
З				Working	Final		
4				YearTotal	YearTotal		
5	All Funds	Total Expenditures	Total Department	1,350,976,387	7,811,326,504		
6				* ^ 6	ton Dofe		
7				A	ter Kerre	sn	
8							

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.

🕀 Zoom In 👻	📑 Keep Only 👔	🛐 Preserve Format	🖶 Save Ad Hoc Gr	id 🔍 🔍 Insert A	ttributes	
🔍 Zoom Out 🛛 🚍 Remove Only 🛛 📲 Change Alias 🛛 🖓 Save As Smart Form						
💷 Pivot 👻	👫 Member Selection 🚿	🔁 Smart Slice	🔞 Cascade 🗸			
		Analysis				
POV (Book 1)S	veet1 1					
	neeri_i					
All Grants 👻	All Projects 👻 All Activities	s 👻 Base 💌 No	Revenue Description	▼ Refresh		
B5	τ : \times \checkmark f_s	Total Expen	ditures			
A	В	с	D	E	F	
1			2019-20	2020-21		
2			Actuals Mapping	Budget		
3			Working	Final		
4			YearTotal	YearTotal		
5 All Funds	Fotal Expenditures	tal Department	1,350,976,387	7,811,326,504		
6						
🔍 Zoom In	👻 耳 Keep Only	🖹 Preserve	Format 🖶 Save	Ad Hoc Grid	🖳 inse	
🔍 Zoom Out	🚍 Remove Only	📲 Change	Alias 🛛 🖶 Save	As Smart Form	í.	
💷 Pivot 🗸	📑 Member Selecti	on 🛛 🕸 Smart Sli	ce 🕞 Casc	ade 🗸		
		۸n	alweis			
		Alle	aiy 515			
POV [Book1]	Sheet1_1					
All Grants 👻	All Projects 👻 All Ac	tivities 👻 Base	Vo Revenue [Description 👻	Refresh	
					- cen esti	
C16	▼ : × ✓	f _x				
A	В	С		D	E	
1		Total Expendi	itures Total Ex	oenditures		
2		2019-20	2020-21			
3		Actuals Mapp	ing Budget			
		the second second by particular p				
4		Working	Final			
4		Working YearTotal	Final	al		
4 5 6 All Funds	Total Department	Working YearTotal	Final YearTota	al 811 326 504		

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.



0	Zoom In ~ Zoom Out Pivot ~	Reep Only Remove Only Member Selection	Preserve Format Change Alias Change Smart Slice	E Save Ad Hoc Save As Smar Cascade ~	Grid 🧠 Insert Attrib	Refresh			
	Analysis								
PO	OV [Book1]S	heet1_1							
A	Grants 👻	All Projects 👻 All Activitie	es 🔻 Base 👻 No	Revenue Descriptio	n 🔻 Refresh				
B6	5	▼ E X 🗸 .	fx Total Depar	tment					
	А		В		с	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	AD0000000 - ANIM/	AL SERVICES DEPA	RTMENT	178,463	29,799,000			
8	All Funds	AT0000000 - OFFICE	OF THE COUNTY	ATTORNEY	6,786,799	21,684,000			
9	All Funds	AU00000000 - AUDIT	AND MANAGEME	NT SERVICES	1,479,092	5,181,000			
10	All Funds	BU0000000 - MANA	GEMENT AND BUD	OGET	1,389,560	10,358,000			
11	All Funds	CC00000000 - COUN	EXECUTE		3,095,223	24,477,900			
12	All Funds	CH0000000 - COMM	I.ACTION & HUMA	N SRVC. DPT.	48,732,510	36,569,679			
13	All Funds	CL0000000 - CLERK	OF COURTS		39,643,475	88,467,600			
14	All Funds	CR0000000 - CORRE	CTIONS & REHABI	LITATION	31,494,703	358,354,200			
15	All Funds	CT0000000 - COMM	UNICATIONS DEP	ARTMENT	4,256,843	20,424,000			
16	All Funds	CU0000000 - DEPAR	TMENT OF CULTU	RALAFFAIRS	18,079,705	54,004,000			
17	All Funds	EC0000000 - COMM	ISSION 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.

€ Q ≣	Zoom In Zoom Out Pivot •	🧠 Insert Attributes				
			Analysis			
РО	V [Book1]S	heet1_1				
All Grants All Activities Base No Revenue Description Refresh 						
B19	9	▼ I X √	<i>f_x</i> FN000000	0 - FINANCE DEPART	MENT	
	А		В	с	D	
1				Total Expenditures	Total Expenditures	
2				2019-20	2020-21	
3				Actuals Mapping	Budget	
4				Working	Final	
5				YearTotal	YearTotal	
6	All Funds	FN0000000 - FIN	ANCE DEPARTMENT	12,258,250	61,063,000	
7						

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

File	Home	Insert	Page Layout	Formulas	Data	Review	View	Smart View
Panel	Connection Start	is <mark>التم) ر</mark>	Indo Image Copy Ledo Image Paste Image Function Edit	Refre	sh Submit Data	t Option	? Help Shee Shee Shee Shee General	vit Info



- 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.

	А	В	с	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.



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.





 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										
Al	All Funds 💌 All Grants 💌 All Projects 💌 All Activities 💌 Base 💌 No Revenue Description 💌 Refresh									
E1										
1	А	В	С	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.

	Options	×
Member Options Data Options Advanced	Change Smart View options related to grid rows and columns.	
Formatting Cell Styles	Suppress Rows	0
Cell Styles Extensions	☑ No Data / Missing	
	Zero	
	No Access	
	🗌 Invalid	
	Underscore Characters	
	Repeated Members	

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



	А	В	С	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
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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.**

Pa	anel Conn	ections	 Image: Copy Paste Image: Functions ➤ Edit 	Refresh Data	Options General	nfo
PC	OV [Book1]S	Sheet1_1				
A	Funds 👻	All Grants 👻 All Projec	ts 👻 All Activities	▼ Base ▼ No Reve	enue Description 👻 F	Refresh
GS)	* E 🗙 🗸	f _x			
	А	В		с	D	E
1					2019-20	2020-21
2					Actuals Mapping	Budget
3					Working	Final
4					YearTotal	YearTotal
5	All Funds	Fotal 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 Serv	vices	Total Department	149,542,910	613,586,822
12		Other Operating	g Costs	Total Department	84,803,029	1,036,253,140
13		Charges for Cou	nty Services	Total Department	119,074,198	443,501,451



P	anel Conn	ections	 Copy Paste Functions × 	Refresh ~ Data	Options ? Help Help Sheet Ir More ~	nfo			
	Start Edit Data General								
P	OV [Book1]S	heet1_1							
A	ll Grants 👻	All Projects 👻 All Act	ivities 👻 Base 👻	No Revenue Description	n ▼ Refresh				
	_		c						
G	9	▼ I : L × · ✓	Jж						
2	Α	В		с	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 Ser	vices	Total Department	149,542,910	613,586,822			
12	All Funds	Other Operating	g Costs	Total Department	84,803,029	1,036,253,140			
13	All Funds	Charges for Cou	nty 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.

F	ile Hor	ne insert Page Layout For	rmulas Data	Review View	Smart View	Help	Planning Ad Hoc	Π
÷	, Zoom In 、 <u>N</u> ext Lev All Leve	Keep Only Preserve Form rel ove Only Change Alias nber Selection Smart Slice	nat 🛱 Save Ad Hoc (E 🛱 Save As Smart C Cascade ~	Grid ₩ Insert Att t Form	ributes Refres	n POV	Cell Actions ~ Calculate ~ Adjust ~	
Bottom Level Analysis Da							Data	
-	- IDOOKIJS	neet1_1						
A	Grants 👻	All Projects 💌 All Activities 💌 Base 💌	No Revenue Description	n 💌 Refresh				
CS	i	🔹 🗄 🔀 🗸 🖌 🦨 Total De	partment					1
	А	В	С	D	E	F	GH	Н
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	• The Years dimension represents fiscal years FY20-FY29. Only budget year and current year will have data in PSTN_RPT
Scenario	 The Scenario dimension corresponds to a class of data, such as: 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	 Working: Budget data sourced from the PSTN database Final: Final budget data from the current year
Period	YearTotal: Unrounded, sum of the months
Requests	Base: Base budget
Employee	 Stores all of the Miami-Dade employee records. This is broken up into: Total Existing Employees EMPVacancy: Vacancy record for each position
JobCode	• Categorizes each job code into a Union or Job Code, so users can report on the Union or Job Code
Position	 Stores all of the Miami-Dade position numbers, new position placeholder members and bucket placeholder members. This is broken up into: Total Existing Positions Total New positions Total Buckets
Pay Element	 Individual pay elements assigned to positions and employees such as: Base Salary, Merit, COLA, Pay Components, Retirement, Taxes, etc. Pull FTE_PE if querying FTE data
Account	 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	 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**.

Smart View	-	×	Smart View	Ŧ		×
Shared Connections	₫ -	»	Shared Connections		•	»
Oracle® Hyperion Planning, Fusion	Ed ▼ →	-	Oracle® Hyperion Planning, Fusion Ed.	🔻	÷	•
epmuat.miamidade.gov MDCBUD M			Image: Construction of the second			
Connect			Ad hoc analysis	orkshe	et	
Add to Private connections			More>>			

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!)



	Options	×
Member Options Data Options Advaced	Change Smart View options related to grid rows and columns.	
Advanced Formatting Cell Styles Extensions	Suppress Rows Suppress Rows No Data / Missing Zero No Access Invalid Underscore Characters Repeated Members	0
	Suppress Columns No Data / Missing Zero (I) No Access (t) Replacement #NoData/Missing Label: #NoAccess Label: #NumericZero #Invalid/Meaningless: Display Invalid Data Image: Submit Zero Display Invalid Data Image: Expanse Type Enable Attribute Association Processing Mode	
	Cell Display Data Navigate Without Data Suppress Missing Blocks	×
Help Reset	ок 👻	Cancel

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

	Options	x
Member Options Data Options Advanced	Change grid formatting, styling and coloring options.	
Formatting	Formatting	0
Extensions	Use Thousands Separator	
	● Use Cell Styles	
	○ Use Excel Formatting	
	Move Formatting on Operations	
	Retain Numeric Formatting	
	Adjust Column Width and Row Height	_

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

	ок 🗖		Cancel
	Save as	Defau	lt Options
_	Apply t	o All Sł	neets



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.

	А	В	С	D	E
1		Pay Element	_		
2		Period	P ▼	×	
3	Account	0	Years	-	
4			Scenario	-	
5			Version		
6			Department		
7			Department		
8			Fund		
9			Grants	-	
10			Project	*	
11			Activity	-	L
12			Position	-	L
13			Requests	-	
14			Employee		
15			lobCode		
16			JODCODE		
1/			Refresh	0	
18					

7. 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.

8. Insert a column to the left of Account (Column A). In the blank cell in column A, row 3, type "JobCode." Select 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.
 - A. Select Years in the right side of the member selection box.
 - B. In the middle of the member selection box, click the left arrow to remove the toplevel dimension member
 - C. On the left side panel, check the box next to the **2021-22** member.
 - D. Click the right arrow in the middle of the member selection box.
 - E. Once the member appears on the right side, click OK in the bottom right corner.
 - F. Refresh the Ad Hoc Grid.





- 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

	Α	В	С	D	E
1			Pay Element		
2			Period	PO	* X
3	JobCode	Account	0	2021-22	-
4				Budget	-
5				Working	
6				Total Dep	artment 👻
7				All Eurode	
8				Airrunus	
9				All Grants	· · ·
10				All Projec	ts 🔻
11				All Activit	ies 🔻
12				Total Pos	itions 🔻
13				Base	
14				Total Emr	lovees 💌
15				Pefech	
16				Refresh	0
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.



- 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.

	А	В	С	D E	
1			FTE_PE		
2			Sep	PO *	^
3	Total Job Codes	Total FTE	28,201	2021-22	-
4				Budget	-
5				Working	-
6				Total Department	
7				All Funds	
8				All Grants	
10				All Projects	
11				All Astronom	
10				All Activities	
12				Total Positions	T
13				Base	-
14				Total Employees	
15					
16				Refresh	
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.

L2	2 -	×	f _x				
	А	В	C	D E		F	G
1			FTE_PE				
2			Sep	PON -	×		
З	Total Job Codes	Total FTE	28,201	2021-22	-		
4				Budget	-		
5				Working	Ţ		
6				Total Department	- - -		
7				All Eurode			
8				Airranas			
9				All Grants	-		
10				All Projects	-		
11				All Activities	-		
12				Total Positions	-		
13				Base	-		
14				Total Employees			
15				- C - L		-	
16				Refresh	0		
17					-		

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

F	OV [Book1]Sheet1_	1																		
	2021-22 🔻 Budget	✓ Working	g 🔻 Tot	al Departme	nt 👻	All Funds	-	All Grants	-	All Projects	-	All Activities	-	Total Positions	*	Base	-	Total Emplo	yees 👻	Refresh
	o1 ▼ :	×	√ fx	FTE P	F															
	-		_		-															
1	A	В	С	D	E		F	G		н		1	J.	К		L		М	N	0
1			FTE_PE	FTE_PE		Con	V	2												
2			Sep	Sep		e c b		\rightarrow												
З	Total Job Codes	Total FTE	28,201	28,201		Pas	ste													
4																				

- 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.



P	OV [Book1]Sheet1_	,1													
2	021-22 🔻 Budget	+ Working	Tota	al Department 💌	All Funds 💌	All Grants 👻	All Projects	✓ All Activit	ies 🔻	Total Positions		-	Total Employ	yees 👻	Refresh
D	12 * :	X	/ f _x												
	А	В	с	D	E	F	G	н	1	J	к		L	м	N
			FTE_PE												
1				Total Pay Elem	nent										
2			Sep	YearTotal	3	Afte	r Re	fres	sh						
3	Total Job Codes	Total FTE	28,201		0										

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.

€ Zoom In ~ I Ke Com Out I Re Pivot ~ Mo	ep Only 🛛 🗐 F move Only 🖓 😭 ember Selection 🛷 S	Preserve Format Change Alias Smart Slice Analysis	E Save Ad Hoc Save As Smar Cascade ~	Grid 📲	Insert Attrib	outes (efresh POV	Cel	l Actions ~ culate ~ ust ~ Data	N Drill-thro R Visualize	ough 📃 : Data ~	1 More
POV [Book1]Sheet1_1	l • Working • Total	Department 💌	All Funds 👻 All C	Grants 💌	All Projects	- All Activi	ities 👻 Tota	Positions	Base V	Total Employ	vees 🔻 R	efresh
В3 ▼ :	X V fx	Total FTE										
A 1 2 3 Total Job Codes	B C FTE_PE T Sep Total FTE_28,201	D Total Pay Eleme YearTotal	ent 0	F	G	Н		J	К	L	M	N
4 2021-22 V Budget V	Working 👻 Total [Department 💌	All Funds 👻 All G	Grants 🔻	All Projects	- All Activi	ties 👻 Total	Positions 🔻	Base 🔻	Total Employ	rees 🔻 Ri	efresh
E11 - :	$\times \sqrt{f_x}$	-	D	E	F	G	Н	1	J	К	L	1
2	Total FTE Total FTE TE_PE Total Pay YearTotal	Element										

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

20	21-22 🔻 Budget	▼ Working	👻 Total Department	✓ All Funds ✓ All (Grants 💌	All Projects	All Activitie	es 🔻 Tota	Positions 🔻	Base 💌	Total Employ	ees 🔻 🖡	Refresh
E8	E8 \checkmark : $\times \checkmark f_{x}$												
	А	В	C	D	E	F	G	н	1	J	К	L	1
1		Total FTE	Total Expenses										
		FTE_PE											
2			Total Pay Element										
			YearTotal										
3		Sep											
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.



e D	Zoom In 2 rep Only Zoom Out Remove Only Pivot Member Selection		Preserve For Change Alia Ction Smart Slice	mat 🖶 Save Ad H s 🖶 Save As S © Cascade N	Hoc Grid mart Form ~	👰 Insert Attr	ibutes	Refresh				
				Analys	is							
POV [Book1]Sheet1epmuatny.miamidade.gov_MDCBUD_PSTN_RPT_1												
2	021-22 👻 Bud	dget	- Working	▼ Total Department	✓ All Funds ✓	All Grants	✓ All Projects	→ All	Activities			
	٨		в	C	D		F					
1			Total FTE	Total Expenses	Total Expenses	Total Exp	enses	_	-			
			FTE_PE									
2			1	Total Pay Element	Total Salary	Total Oth	er Compens	ation				
				YearTotal	YearTotal	YearTota	I					
3			Sep									
4	Total Job Co	des	28,201	2,484,938,555	1,514,697,838		970,24	40,717				
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	Н	I	J	К	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				
	Current Year Salary	Total Merit	Cost of Living Adjustment	Furlough Deduction	Compensation	Total Additional Earnings	Total Benefits	Total Florida Retirement System Plans	Total Employer Paid Taxes
YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal
1 514 607 939	1 404 010 555	14555404	45 400 000	076 110	070 040 747	222 242 527	244 242 575	205 102 555	120.047.050

 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 Forma	nt 🖶 Save	Ad Hoc Grid 🔍	Insert Attributes	CD =	Cell Action	s 👻 🔩 Drill-through 🛛 📃							
	Next Level Iove Only 📲 Change Alias	E Save	As Smart Form			🖬 Calculate ~	🗟 Visualize							
	nber Selection 🖓 Smart Slice	🕼 Case	ade ~		Refresh POV	😻 Adjust ~	🗊 Submit Data 🗸							
	All Levels													
	Bottom Level Analysis				I	l	Jata							
-	rov (book ()sneet repmuatny.miamidade.gov_MDCBUD_PSTN_RPT_1													
20	21.22 - Rudget - Werking - Total Department -	All Eurodo		All Drojocto - A	Activition - Total D	esitions - Roos	- Total Employana - Da							
20	21-22 + Budget + Working + Total Department +	AirFunus	All Grants +	All Projects + A	I Acuviues V Total P	osidoris 👻 base	* Total Employees * Re							
113	$\tau : \times \sqrt{f_x} = 0$													
	A	B	С	D	E	F	G							
1		Total FTE	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses							
		FTE_PE												
			Total Pay Element	Tatal Calany										
2				Total Salary	Current Vear Salary	Total Marit	Cost of Living Adjustment							
2			VearTotal	VearTotal	VearTotal	VearTotal	VearTotal							
3_		Sep	i cui i otui	incurrotur.	i currotur	i currotur	- Carrotan							
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.

€ 0	Joom In ✓ 📮 Keep Only 🗐 Joom Out 📮 Remove Only 🕞 Pivot ✓ 📑 Member Selection ♦	Preserve For Change Alia Smart Slice	rmat 🖶 Save Ad H Is 🕞 Save As Sr 🕼 Cascade ~	oc Grid 🤎 In nart Form	sert Attributes	fresh POV	🧐 Cell Actions × 🗳 Drill- 亩 Calculate × 👍 Visua Adjust × 🚯 Subn	through 🛛 🗮 More ~ Ilize nit Data ~					
		Analys	is				Data						
P	POV [Book1]Sheet1epmuatny.miamidade.gov_MDCBUD_PSTN_RPT_1												
20	021-22 🔻 Budget 👻 Working 👻 Total	Department	▼ All Funds ▼ /	All Grants 👻 All I	Projects 👻 All Activit	ies 👻 Total Posi	tions 👻 Base 👻 Total Em	ployees 👻 Refresh					
A	\bullet \bullet : $\times \checkmark J_{x}$	W&S CA	ADASTRAL TECHN	ICIAN - 005665									
	А	В	С	D	E	F	G	Н					
1		Total FTE	Total Expenses	Total Expenses	Total Expenses	Total Expenses Total Expenses		Total Expenses					
2		FTE_PE	Total Pay Element	Total Salary	Current Year Salary	Total Merit	Cost of Living Adjustment	Furlough Deduction					
,		Can	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal					
4	W&S CADASTRAL TECHNICIAN - 005665	Sep 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.



File	Home	Insert	Page Layout	Forn	nulas	Data	Review	View	Smart View
Panel	Connections V	≌ ⊋ ∪ @ R	ndo 🗈 Copy edo 🖀 Paste 🔊 Function	ns Y	Refresh v	Submi Data	it Option:	PHelp PHelp Shee	t Info
	Start		Edit			Data		General	

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

P	POV [Book1]Sheet1epmuatny.miamidade.gov_MDCBUD_PSTN_RPT_1											
20	2021-22 💌 Budget 💌 Working 💌 Total Department 💌 All Funds 💌 All Grants 💌 All Projects 💌 All Activities 💌 Total Positions 💌 Base 💌 Total Employees 💌 Refresh											
A	A4. 🔻 : X 🗸 f_x Total Job Codes											
	А	В	С	D	E	F	G	н	I.			
1		Total FTE	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses	Total Expenses			
2		FTE_PE	Total Pay Element	Total Salary	Current Year Salary	Total Merit	Cost of Living Adjustment	Furlough Deduction	Total Other Compensation			
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