

# Miami-Dade County



## BAT Smart View Training Activity Guide

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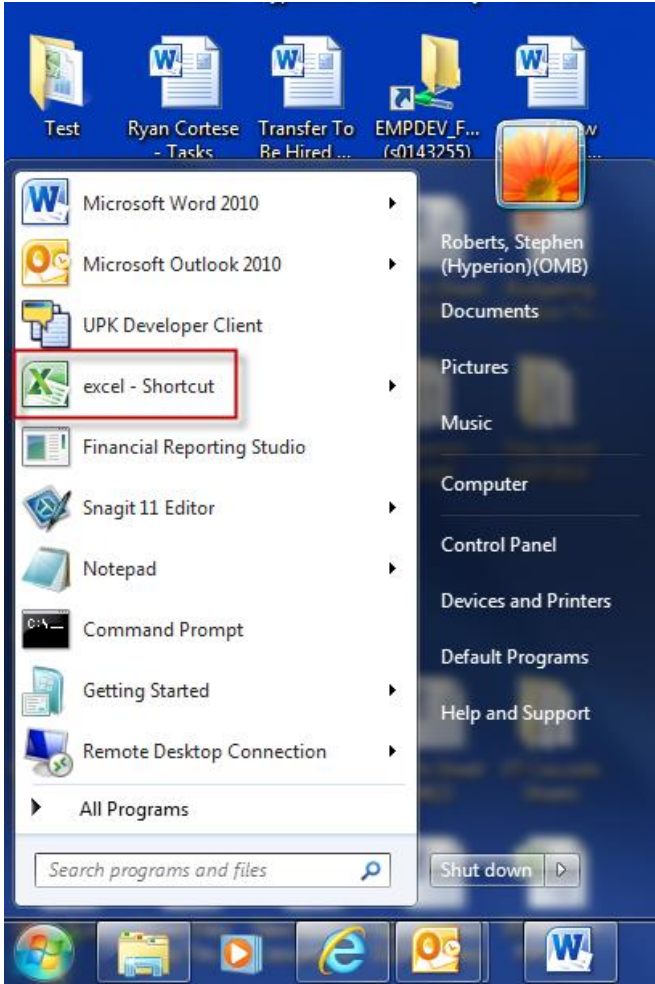
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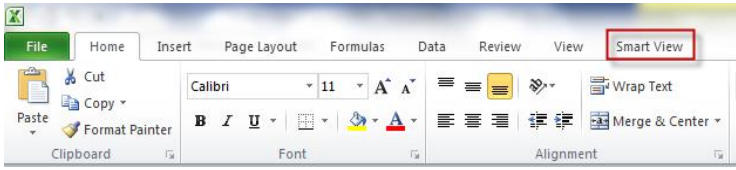
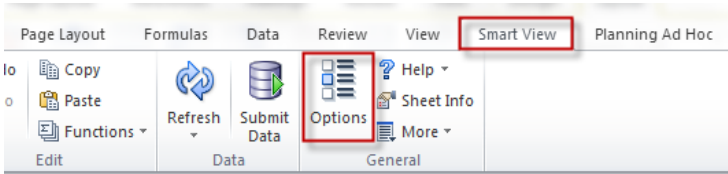
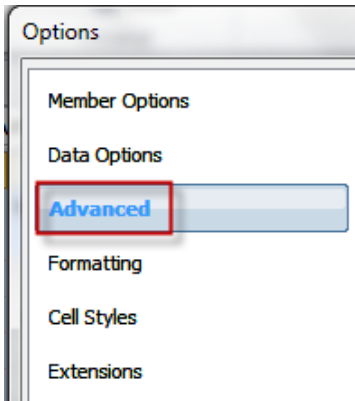
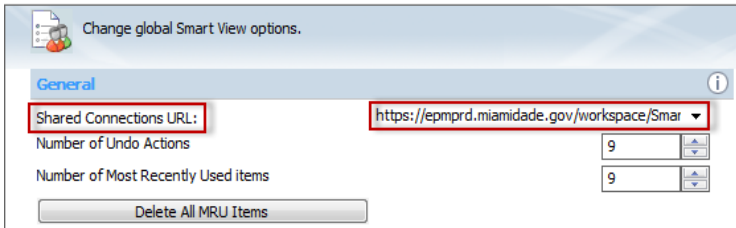
## BAT Smart View Training – In Class Activities

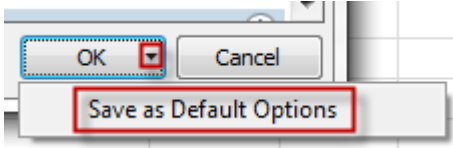
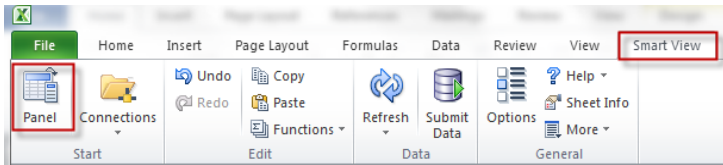
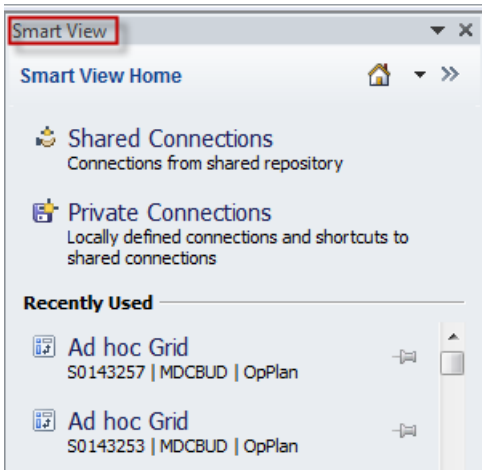
### Activity 1: Launch Microsoft Excel, Check User Options and Use the Connection Panel.

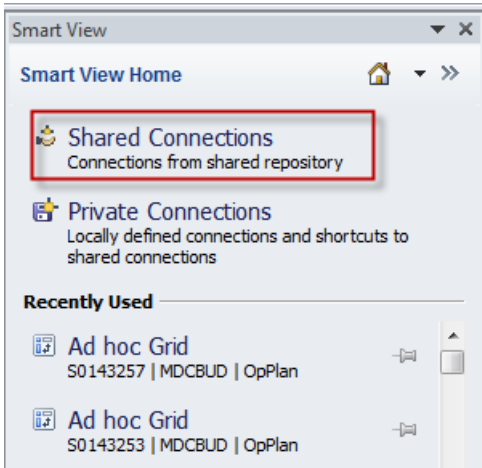
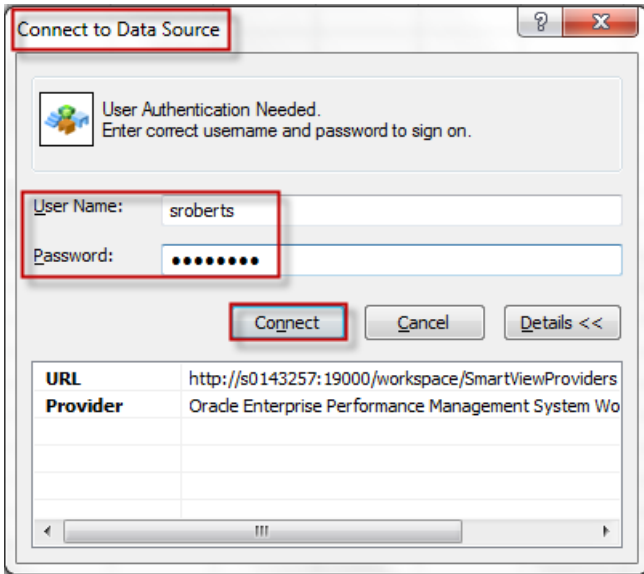
In this activity, you will:

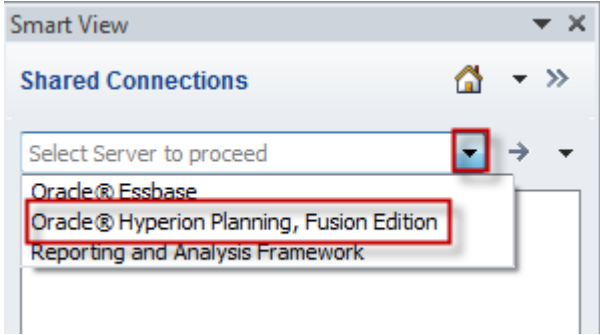
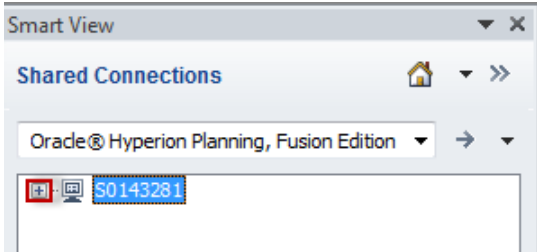
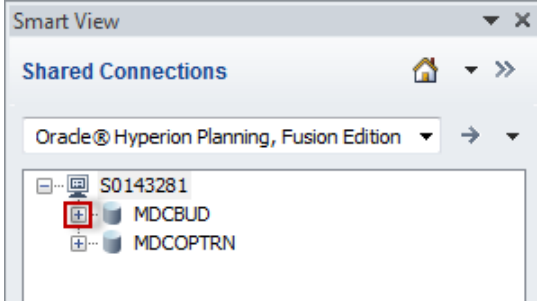
- From your desktop, launch Microsoft Excel and Open the Microsoft Connection Panel
- Go to Smart View > Options and verify the Shared Connection URL
- Use a Shared Connection to connect to the BAT application
- Set up a Private Connection for ease in future connections

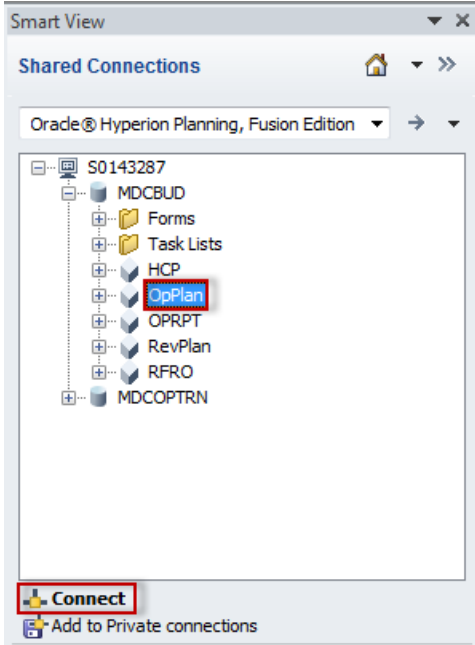
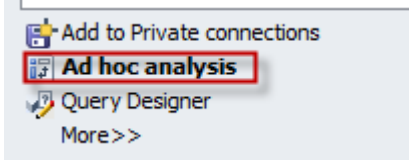
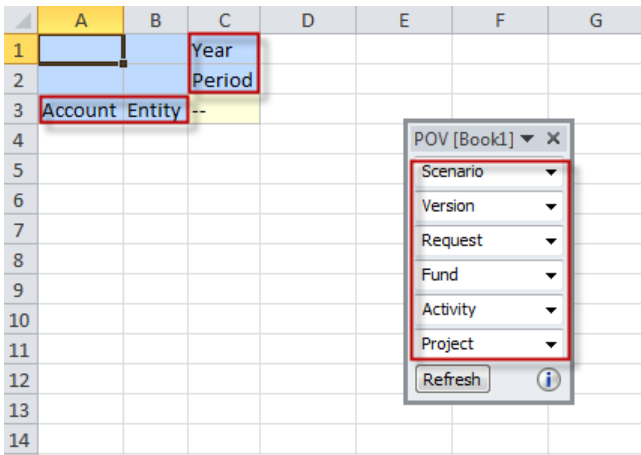
Step	Action	Notes
1.	<p>From the Desktop, open <b>Microsoft Excel</b>.</p>  <p>The screenshot shows a Windows 7 desktop with a blue background. The Start menu is open, displaying a list of applications. The 'excel - Shortcut' is highlighted with a red rectangle. The desktop has several icons: 'Test', 'Ryan Cortese - Tasks', 'Transfer To Be Hired ...', 'EMPDEV_F... (&lt;0143255)', and a folder icon. The taskbar at the bottom shows icons for Internet Explorer, File Explorer, a media player, and Microsoft Word and Excel. The Start menu also shows 'Microsoft Word 2010', 'Microsoft Outlook 2010', 'UPK Developer Client', 'Financial Reporting Studio', 'Snagit 11 Editor', 'Notepad', 'Command Prompt', 'Getting Started', 'Remote Desktop Connection', and 'All Programs'. A search bar at the bottom of the Start menu says 'Search programs and files'. On the right side of the Start menu, there are links to 'Roberts, Stephen (Hyperion)(OMB)', 'Documents', 'Pictures', 'Music', 'Computer', 'Control Panel', 'Devices and Printers', 'Default Programs', and 'Help and Support'. A 'Shut down' button is at the bottom right of the Start menu.</p>	

Step	Action	Notes
2.	<p>Click the <b>Smart View</b> menu option located on the Excel menu bar.</p> 	<p>If you do not see the Smart View menu option, please contact your Budget Analyst.</p>
3.	<p>On the Smart View ribbon, click the <b>Options</b> icon.</p> 	
4.	<p>In the left pane, click the <b>Advanced</b> menu option.</p> 	
5.	<p>Be sure that the Shared URL displays the following. If it does not, please type it in the field.</p> <p><b>Note:</b> The URL is case sensitive.</p> <p><a href="https://epmprd.miamidade.gov/workspace/SmartViewProviders">https://epmprd.miamidade.gov/workspace/SmartViewProviders</a></p> 	

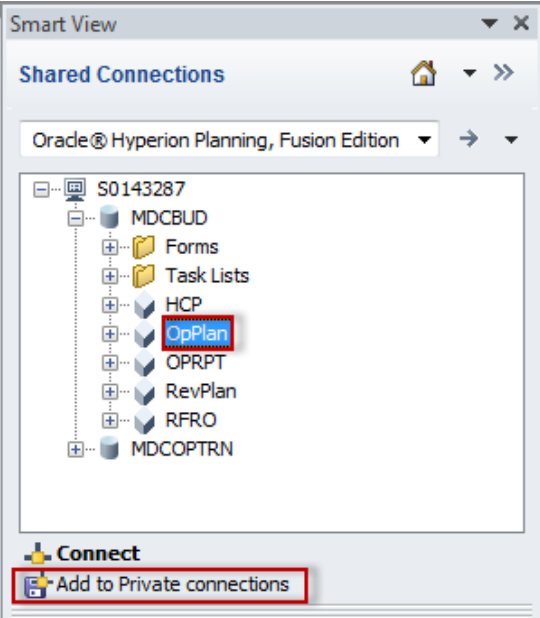
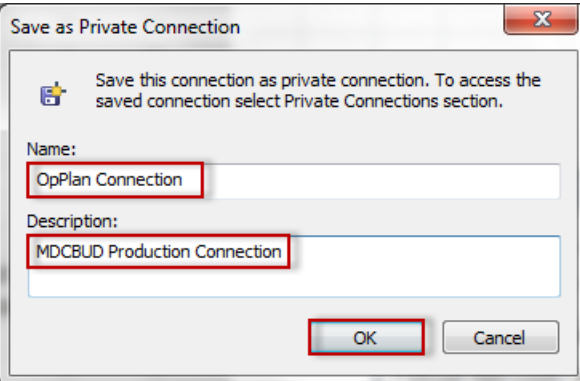
Step	Action	Notes
6.	<p>To save the changes, click the <b>down-arrow</b> next to the <b>OK</b> button and click <b>Save As Default Options</b>.</p> 	
7.	<p>On the <b>Smart View</b> ribbon, click the <b>Panel</b> icon.</p> 	
8.	<p>Located at the right side of the screen, the <b>Connection Panel</b> displays.</p> 	

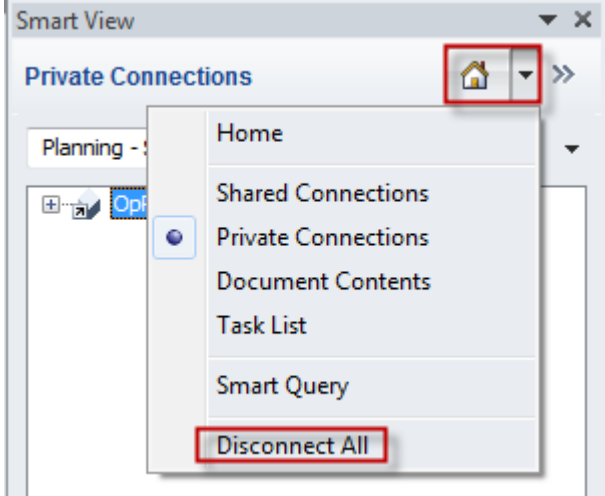
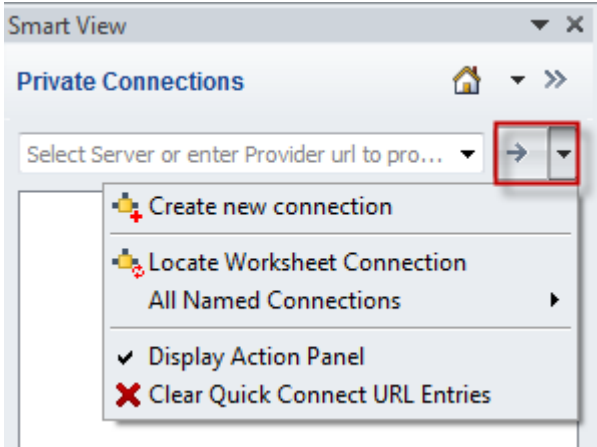
Step	Action	Notes
9.	<p>Click the <b>Shared Connections</b> link.</p> 	
10.	<p>The <b>Connect to Data Source</b> screen displays:</p> <p>Type your <b>BAT User Name</b> and <b>Password</b>.</p> <p>Click <b>Connect</b>.</p> 	

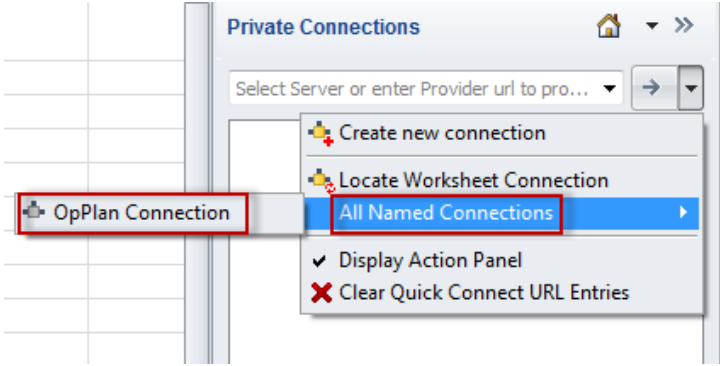
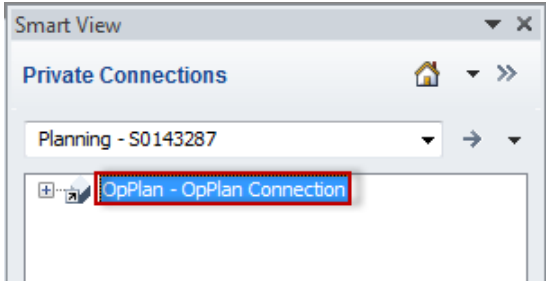
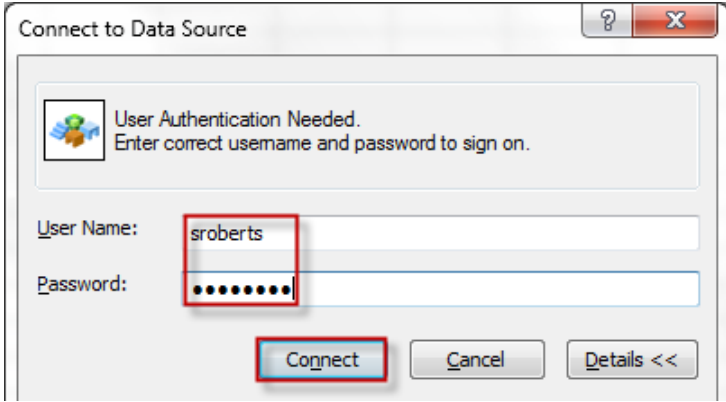
Step	Action	Notes
11.	<p>From the <b>Connection Panel</b> screen, click the drop-down arrow and select <b>Oracle Hyperion Planning, Fusion Edition</b>.</p> 	
12.	<p>Click the <b>+</b> next to the server number.</p>  <p>Then expand the <b>MDCBUD</b> application.</p> 	

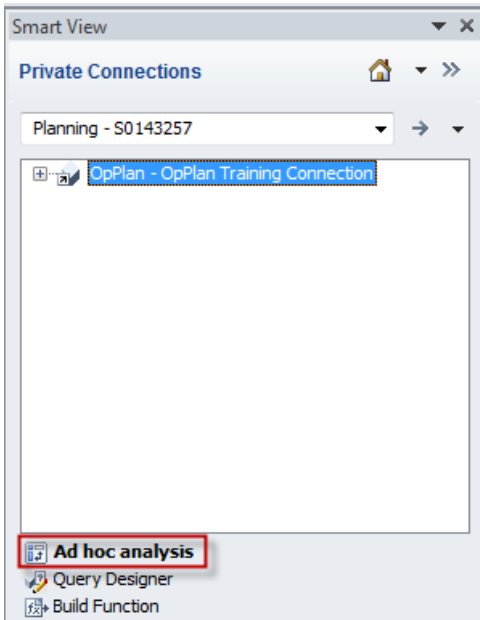
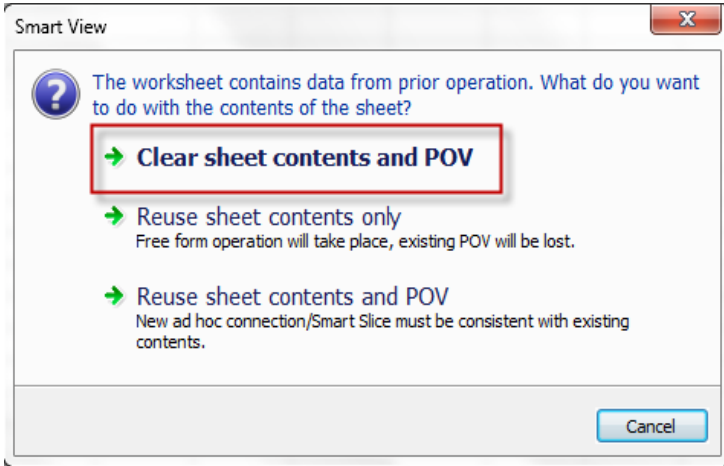
Step	Action	Notes
13.	<p>Click the <b>OpPlan</b> member and click <b>Connect</b>.</p> <p>You are now connected to the BAT database.</p> 	
14.	<p>Click <b>Ad Hoc Analysis</b> and the dimension members from the <b>OpPlan</b> database display on the sheet.</p>  	

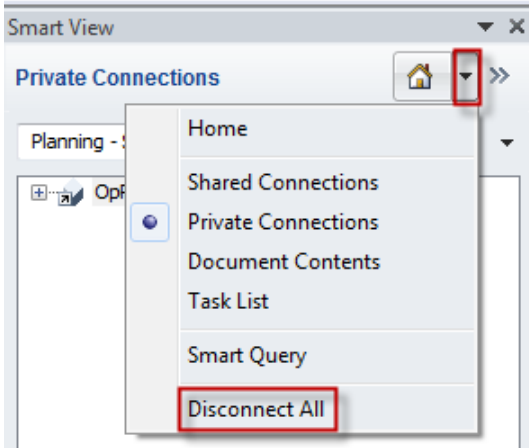


Step	Action	Notes
15.	<p>If you will be connecting to this database on a regular basis, you may add this connection as a <b>Private Connection</b>.</p> <p>Click the <b>Add to Private Connections</b> link.</p> 	<p>A <b>Private Connection</b> is very similar to marking a web site to your Favorites list in Internet Explorer.</p>
16.	<p>On the <b>Save as Private Connection</b> screen, type the following information <b>Name</b> and <b>Description</b> information in the highlighted fields and click <b>OK</b>.</p> 	

Step	Action	Notes
17.	<p>To test the new <b>Private Connection</b>, disconnect from the database.</p> <p>Click the drop-down arrow next to the <b>Home Icon</b> and click <b>Disconnect All</b>.</p> 	
18.	<p>From the <b>Connection Panel</b> screen, click the drop-down arrow next to the <b>Server</b> field.</p> 	

Step	Action	Notes
19.	<p>Click the <b>All Named Connections</b> and select the newly created <b>Private Connection</b>.</p> 	
20.	<p>The <b>Private Connection</b> name displays. Click <b>Connect</b>.</p> 	
21.	<p>When prompted, enter your <b>User Name</b> and <b>Password</b> and click <b>Connect</b>.</p> 	

Step	Action	Notes
22.	<p>Click the <b>Ad Hoc Analysis</b> link.</p> 	
23.	<p>If the following screen appears, click the <b>Clear Sheet contents and POV</b> option.</p> 	<p>This screen appears when an existing Smart View sheet is displayed on the screen.</p> <p>The <b>Reuse sheet contents only</b> option will keep row and column dimension members but remove the POV members.</p> <p>The <b>Reuse sheet contents and POV</b> will retain row and column members as well as POV members.</p>

Step	Action	Notes
24.	<p>If you need to disconnect Excel from the database, simply click the drop-down arrow next to the <b>Home Icon</b> and select <b>Disconnect</b>.</p> <p><b>Note:</b> Please <u>do not</u> disconnect now – as we will continue working the class activities.</p> 	

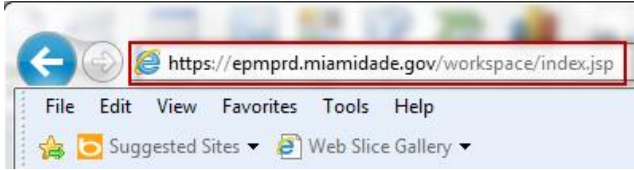
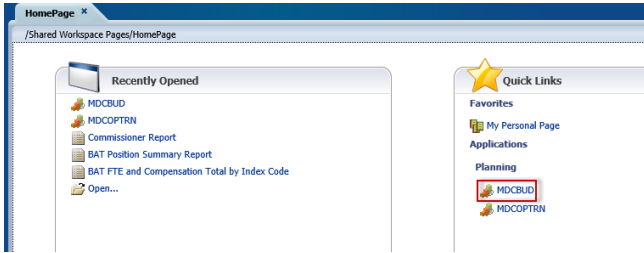
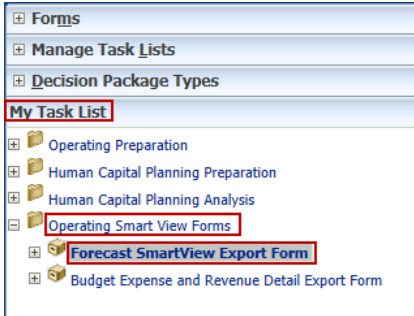
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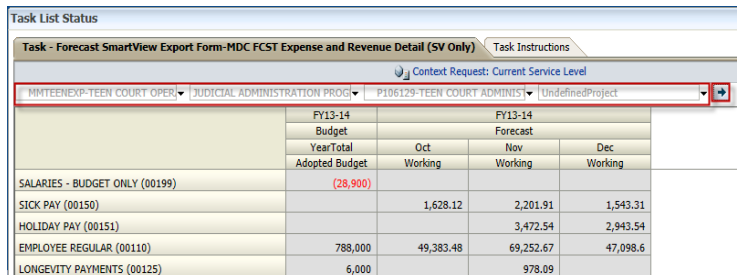
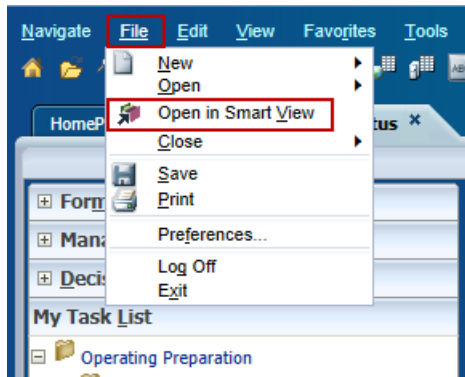
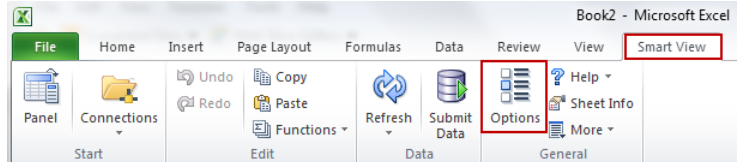


## Activity 2: Opening BAT Web Forms in Smart View.

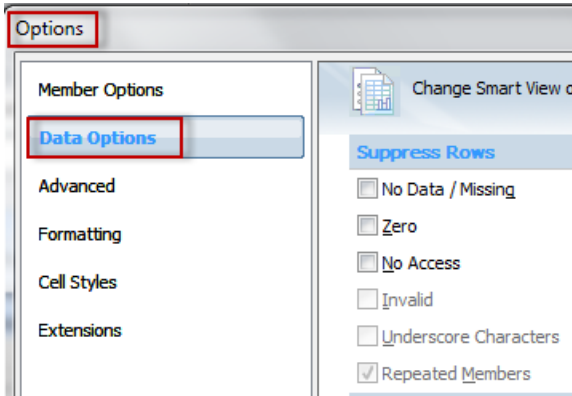
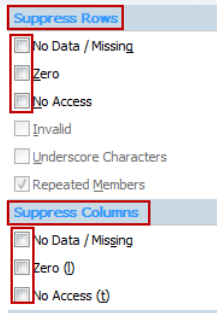

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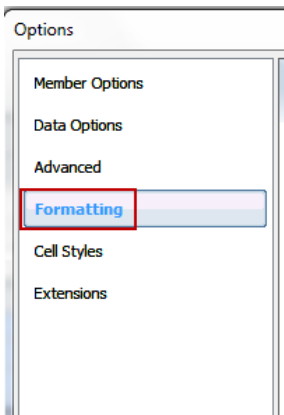
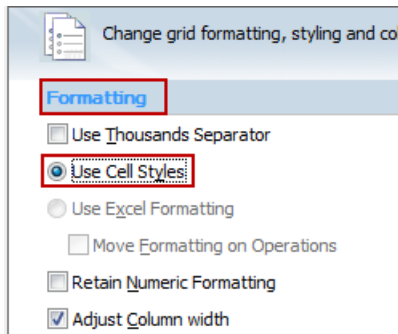
- Open the BAT, MDCBUD application and open a Web From
- Use the connection manager to connect to the BAT OpPlan database
- Connect using Shared Connections
- Open the Forecast Smart View Export Form
- Follow the steps to export the Forecast form to Hyperion Smart View (Excel)
- Verify Smart View Options are set correctly

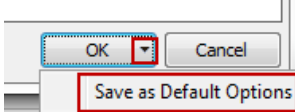
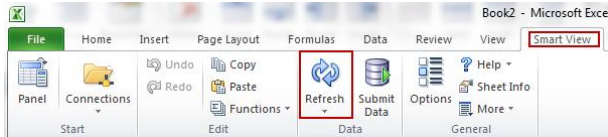
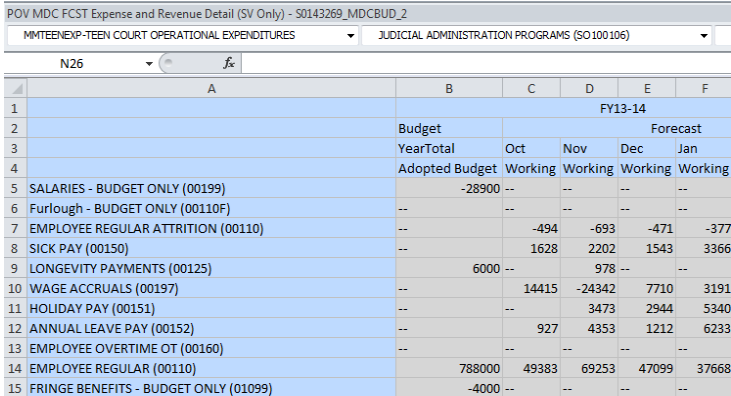
Step	Action	Notes
1.	<p>Open <b>Internet Explorer</b> and type the following in the URL bar:</p> <p><a href="https://epmprd.miamidade.gov/workspace/index.jsp">https://epmprd.miamidade.gov/workspace/index.jsp</a></p> 	
2.	<p>Click on the <b>MUDBUD</b> application.</p> 	
3.	<p>Navigate to <b>My Task List</b> and select <b>Operating Smart View Forms &gt; Forecast Smart View Export Form</b>.</p> 	

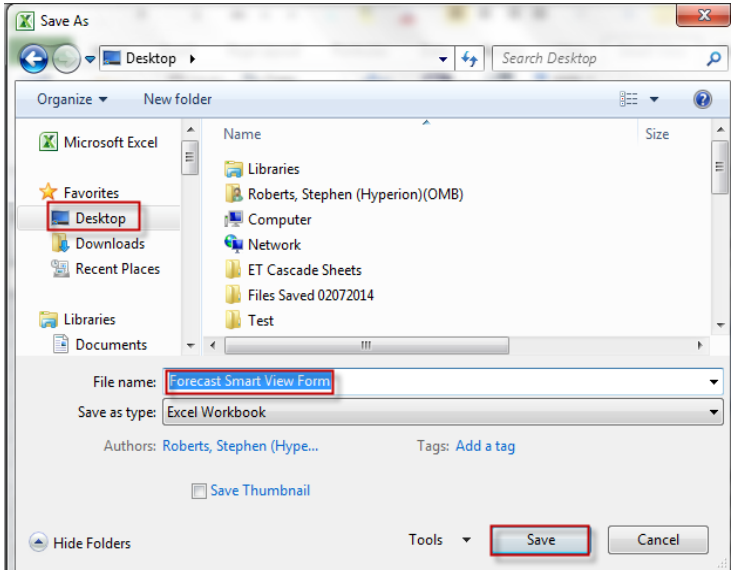
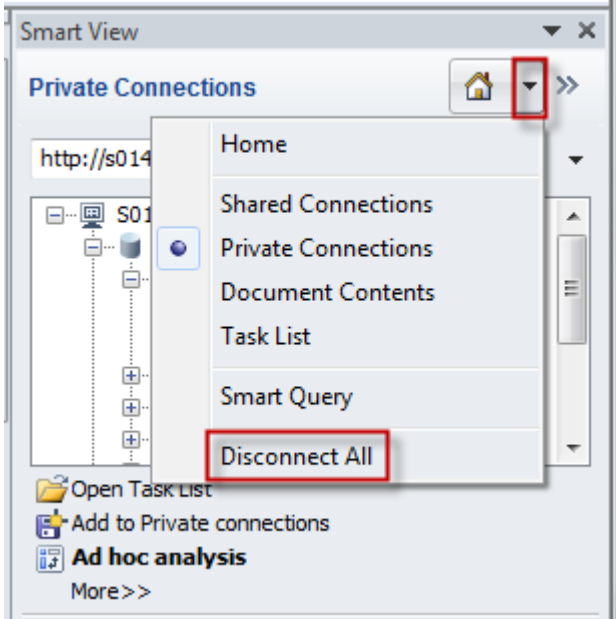
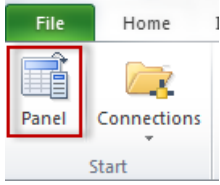
Step	Action	Notes																																														
4.	<p>Set the <b>Point of View</b> members on the form and click <b>Go</b>.</p> <ul style="list-style-type: none"><li>Entity (Index Code)</li><li>Fund</li><li>Activity (Project)</li><li>Project (Grant)</li></ul>  <table><tr><th rowspan="3"></th><th colspan="2">FY13-14 Budget</th><th colspan="3">FY13-14 Forecast</th></tr><tr><th>YearTotal</th><th>Oct</th><th>Nov</th><th>Dec</th><th></th></tr><tr><th>Adopted Budget</th><th>Working</th><th>Working</th><th>Working</th><th></th></tr><tr><td>SALARIES - BUDGET ONLY (00199)</td><td>(28,900)</td><td></td><td></td><td></td><td></td></tr><tr><td>SICK PAY (00150)</td><td></td><td>1,628.12</td><td>2,201.91</td><td>1,543.31</td><td></td></tr><tr><td>HOLIDAY PAY (00151)</td><td></td><td></td><td>3,472.54</td><td>2,943.54</td><td></td></tr><tr><td>EMPLOYEE REGULAR (00110)</td><td>788,000</td><td>49,383.48</td><td>69,252.67</td><td>47,098.6</td><td></td></tr><tr><td>LONGEVITY PAYMENTS (00125)</td><td>6,000</td><td></td><td>978.09</td><td></td><td></td></tr></table>		FY13-14 Budget		FY13-14 Forecast			YearTotal	Oct	Nov	Dec		Adopted Budget	Working	Working	Working		SALARIES - BUDGET ONLY (00199)	(28,900)					SICK PAY (00150)		1,628.12	2,201.91	1,543.31		HOLIDAY PAY (00151)			3,472.54	2,943.54		EMPLOYEE REGULAR (00110)	788,000	49,383.48	69,252.67	47,098.6		LONGEVITY PAYMENTS (00125)	6,000		978.09			
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5.	<p>To display the form in Hyperion Smart View (Microsoft Excel Add-in), click <b>File &gt; Open in Smart View</b>.</p> 																																															
6.	<p>To verify the Smart View Options are set correctly, click <b>Smart View &gt; Options</b>.</p> 																																															

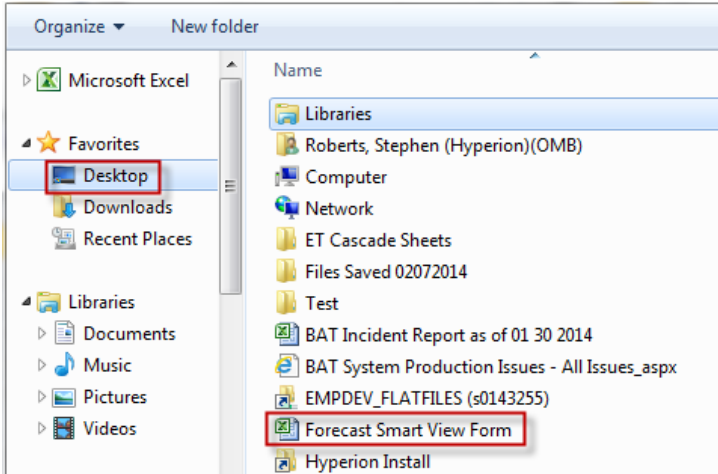
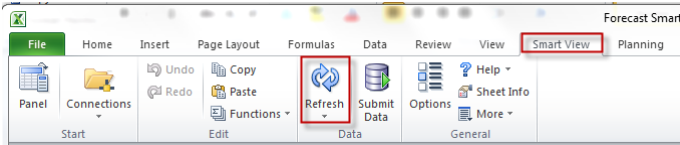
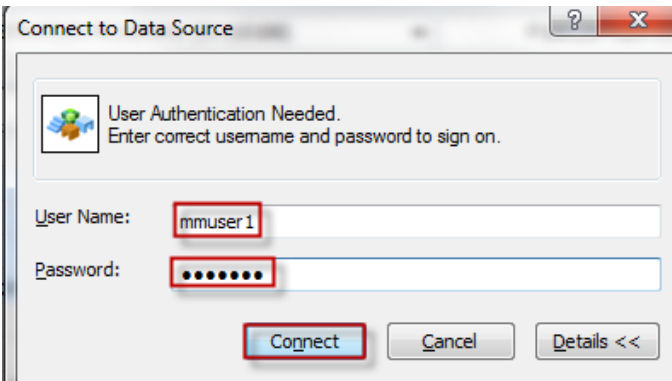


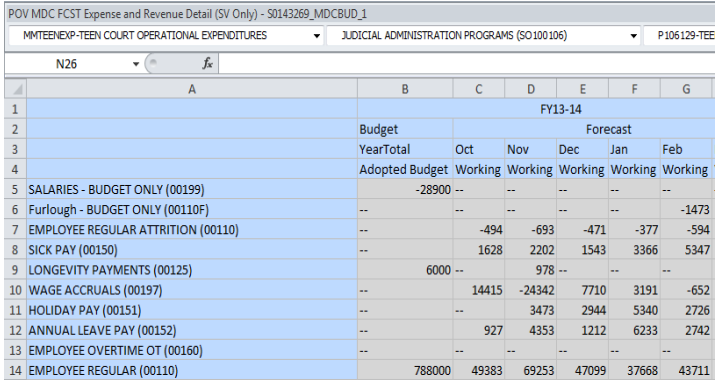
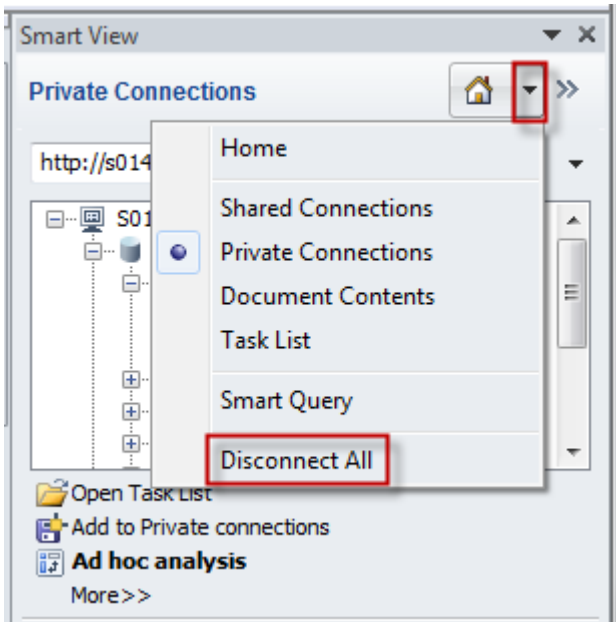
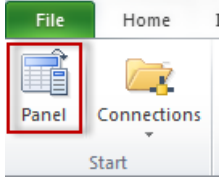
Step	Action	Notes
7.	<p>On the <b>Options</b> screen, click <b>Data Options</b>.</p> 	
8.	<p>In the <b>Suppress Rows</b> and <b>Suppress Columns</b> section, be sure that all items are unchecked.</p> 	
9.	<p>In the <b>Replacement</b> sections, be sure that the <b>#NoData/Missing Label:</b> field is set to -- (double dashes).</p> 	

Step	Action	Notes
10.	<p>Click the <b>Formatting</b> button.</p> 	
11.	<p>In the <b>Formatting</b> section, click <b>Use Cell Styles</b>.</p> 	

Step	Action	Notes
12.	<p>Once complete, locate the <b>OK</b> button at the lower right corner of the screen. Click the down-arrow next to <b>OK</b> and <b>Save as Default Options</b>.</p> 	
13.	<p>Click <b>Smart View &gt; Refresh</b> to display the data.</p> 	
14.	<p>The <b>Forecast</b> form displays in <b>Microsoft Excel</b>.</p> 	

Step	Action	Notes
15.	<p>Click <b>File &gt; Save As</b>. Save the file on your desktop – Name: <b>Forecast Smart View Form</b>.</p> 	
16.	<p>To test the saved Smart View sheet, from the <b>Connection Panel</b>, click the <b>drop-down arrow</b> next to the <b>Home Icon</b> and click <b>Disconnect All</b>.</p> 	<p>If the <b>Connection Panel</b> is not displayed, simply click the <b>Panel</b> icon on the <b>Smart View</b> toolbar.</p> 
17.	<p>Select <b>File &gt; Exit</b> to close <b>Microsoft Excel</b>.</p>	

Step	Action	Notes
18.	<p>Open Microsoft Excel and on the desktop, open the <b>Forecast Smart View Form.xlsx</b> file.</p> 	
19.	<p>When the form opens, click <b>Smart View &gt; Refresh</b>.</p> 	
20.	<p>At the login screen, enter your <b>User Name</b> and <b>Password</b>. Click <b>Connect</b>.</p> 	

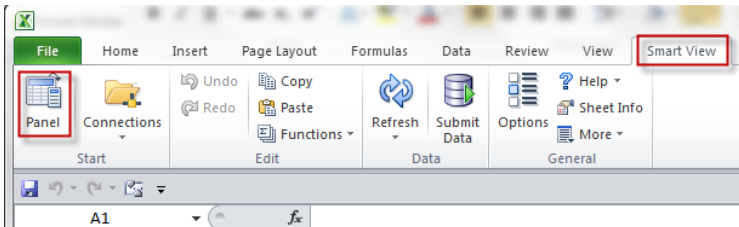
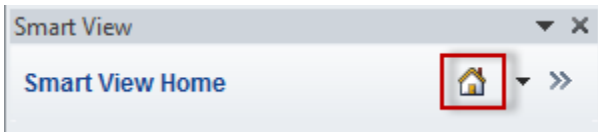
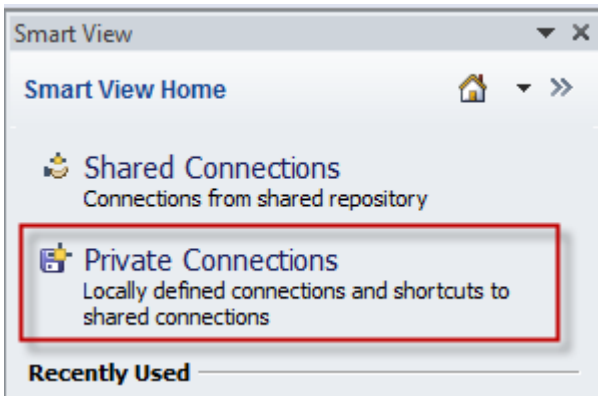
Step	Action	Notes
21.	<p>You are now connected to the BAT database and may make modifications to data as desired.</p> 	
22.	<p>From the <b>Connection Panel</b>, click the <b>drop-down arrow</b> next to the <b>Home Icon</b> and click <b>Disconnect All</b>.</p> 	<p>If the <b>Connection Panel</b> is not displayed, simply click the <b>Panel</b> icon on the <b>Smart View toolbar</b>.</p> 
23.	<p>Select <b>File &gt; Exit</b> to close Microsoft Excel.</p>	

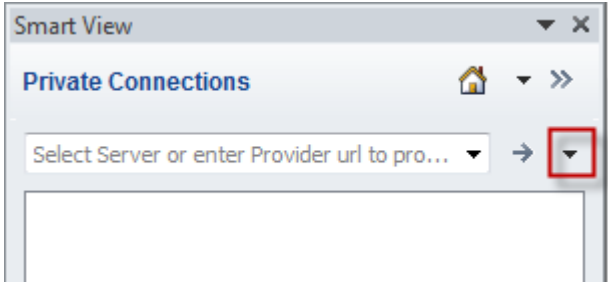
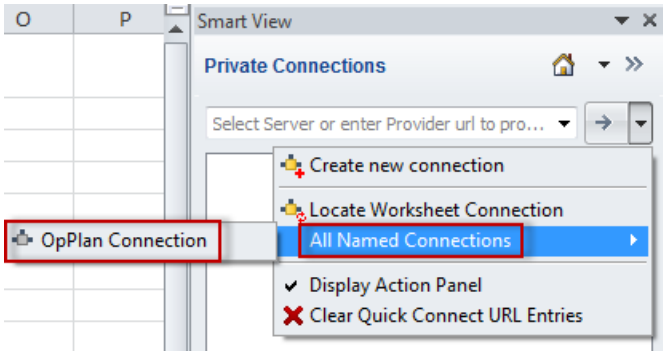
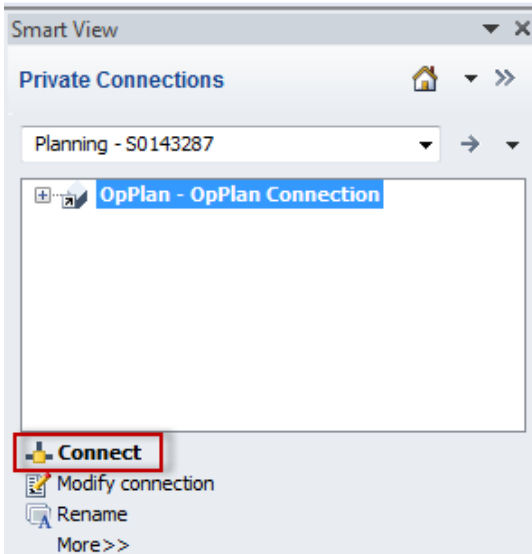
--END--

## Activity 3: Create Ad Hoc Sheet and Setting the Point of View (POV) members.

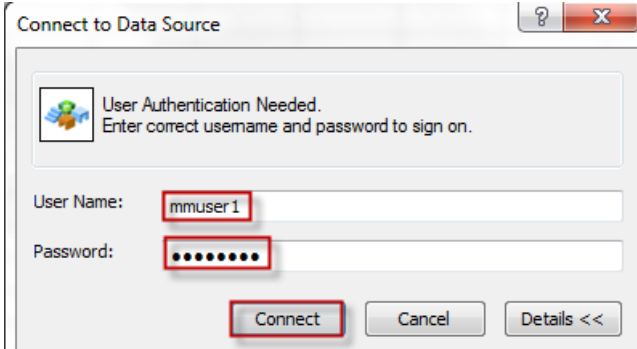
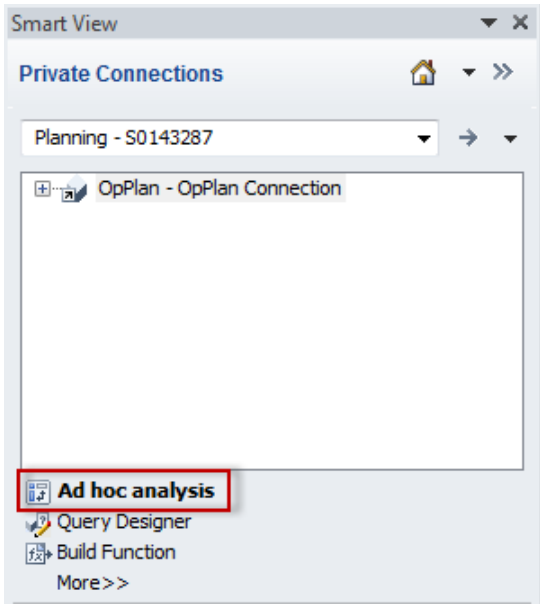
In this activity, you will:

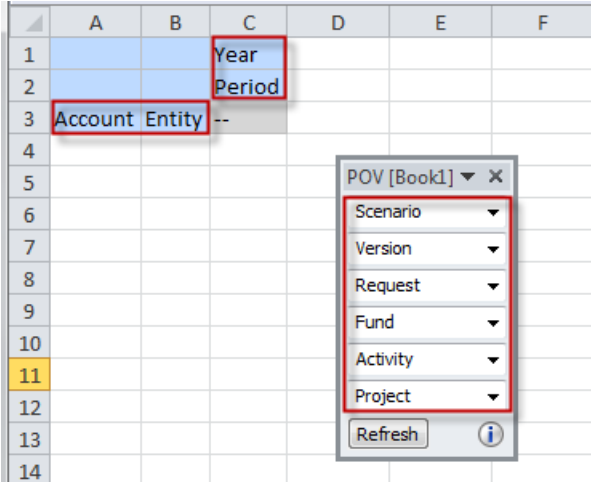
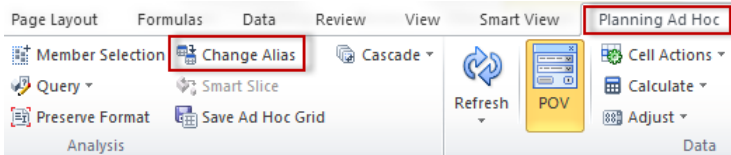

- Connect to the OpPlan database using Private Connection
- Create an AdHoc sheet in the OpPlan database
- Set the Smart View Alias Table to Default
- Set the Point of View members for the dimensions
- Use the Pivot functionality to change the orientation of sheet

1.	Open <b>Microsoft Excel</b> .	
2.	Click <b>Smart View &gt; Panel</b> .	
3.	Click the <b>Home</b> icon.	
4.	Click the <b>Private Connections</b> hyperlink.	

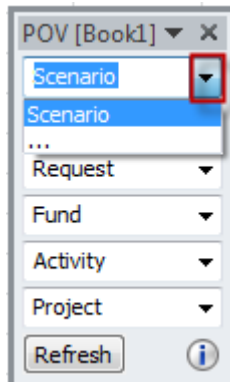
Step	Action	Notes
5.	<p>From the <b>Private Connection</b> screen, click the <b>down-arrow</b> icon.</p> 	
6.	<p>Click <b>All Named Connections &gt; OpPlan Connection</b>.</p> 	
7.	<p>Click <b>Connect</b>.</p> 	



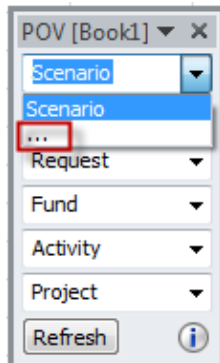
Step	Action	Notes
8.	<p>Enter your BAT <b>User Name</b> and <b>Password</b>. Click <b>Connect</b>.</p> 	
9.	<p>Click <b>Ad hoc analysis</b>.</p> 	

Step	Action	Notes
10.	<p>Once you are connected to the database and the <b>Ad Hoc Analysis</b> link is clicked, all <b>10 BAT Dimensions</b> from the OpPlan database display on the screen:</p> <ul style="list-style-type: none"> <li>• <b>Account</b> and <b>Entity</b> in the rows</li> <li>• <b>Year</b> and <b>Period</b> in the Columns</li> <li>• All other dimensions in the Point of View (POV) box</li> </ul> 	<p>All 10 dimensions from the MDCBUD application are displayed on the sheet.</p>
11.	<p>On the <b>Planning Ad Hoc</b> toolbar, click <b>Change Alias</b>.</p> 	
12.	<p>Click the <b>Default</b> link.</p> 	<p>The <b>Default Alias</b> table will display the member names on the Smart View sheet.</p>

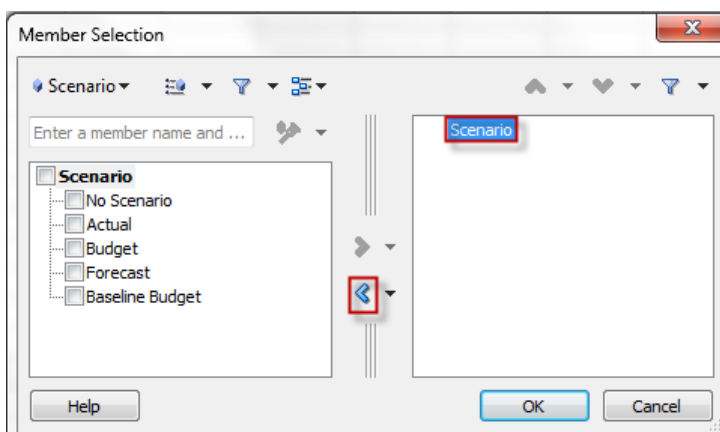
13. To set the **Point of View** member for **Scenario**, click the drop-down arrow next to the dimension.

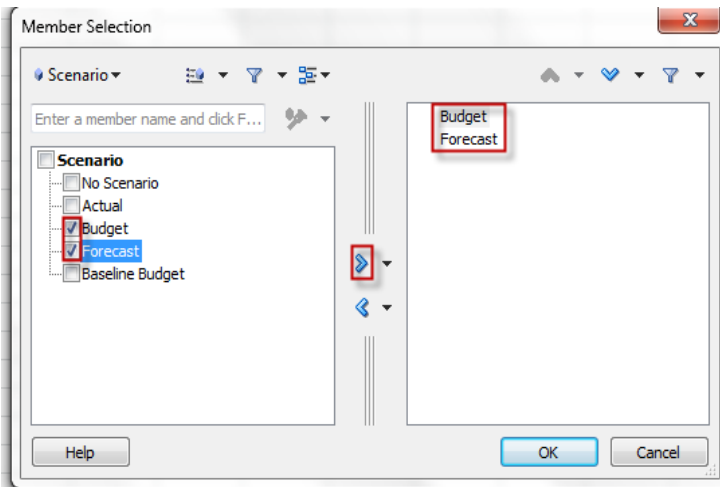
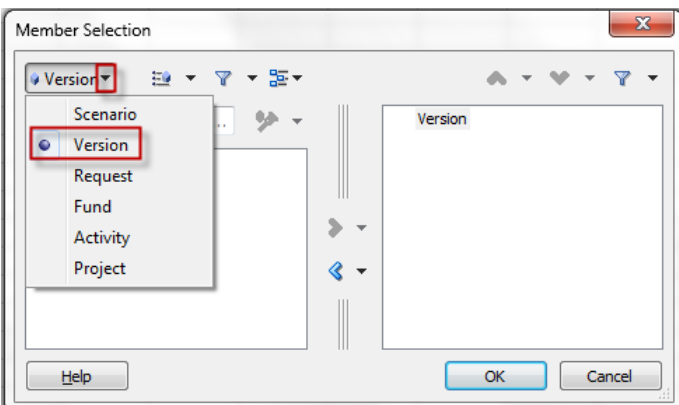


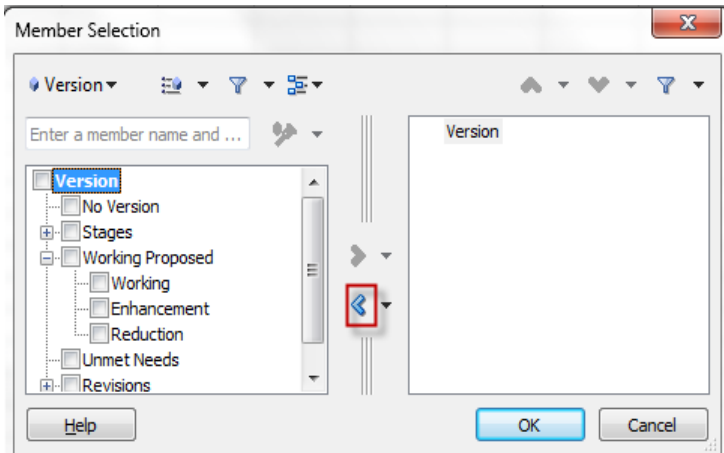
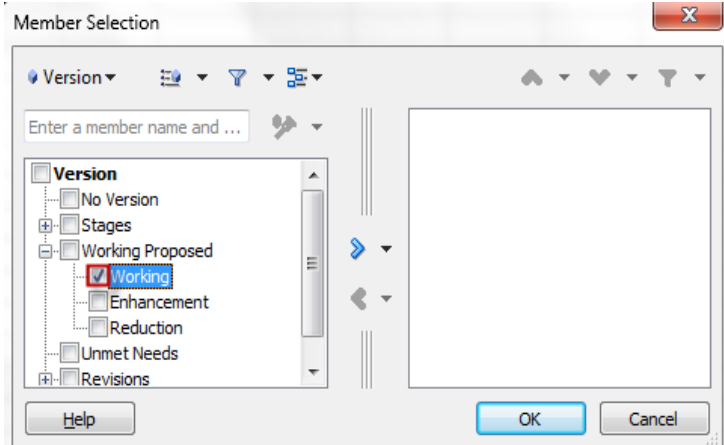
14. Click the **ellipsis** (...) located below the member Scenario.

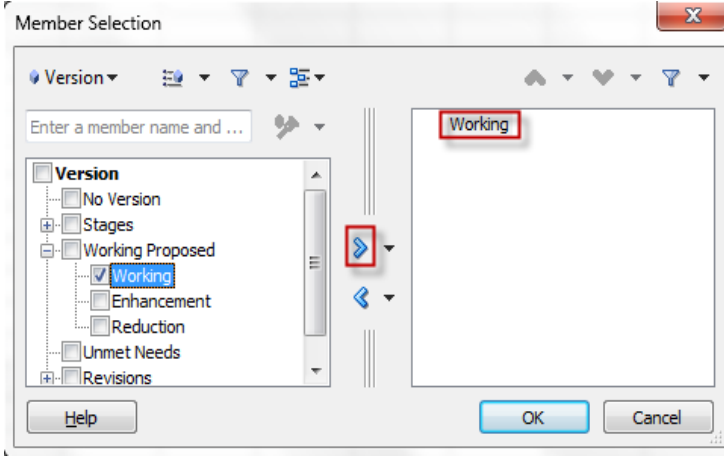
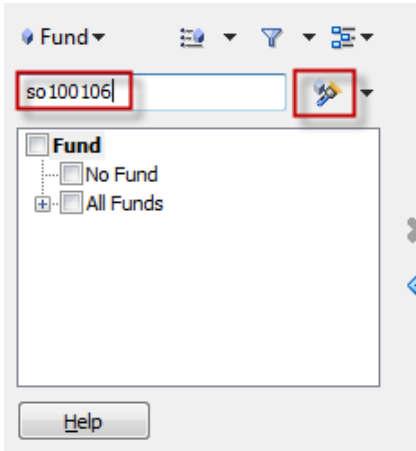


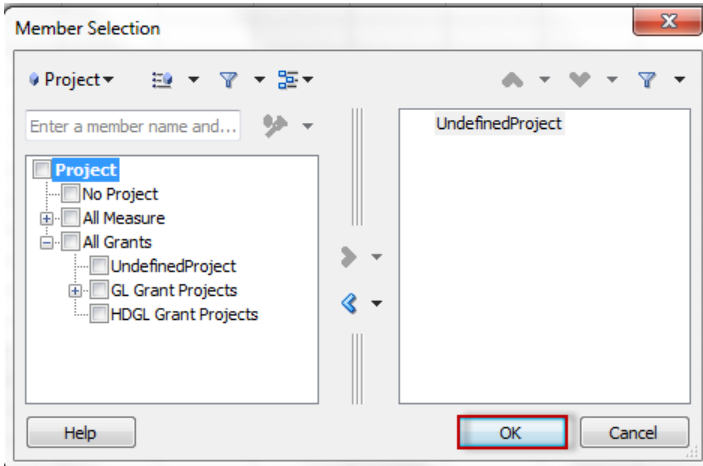
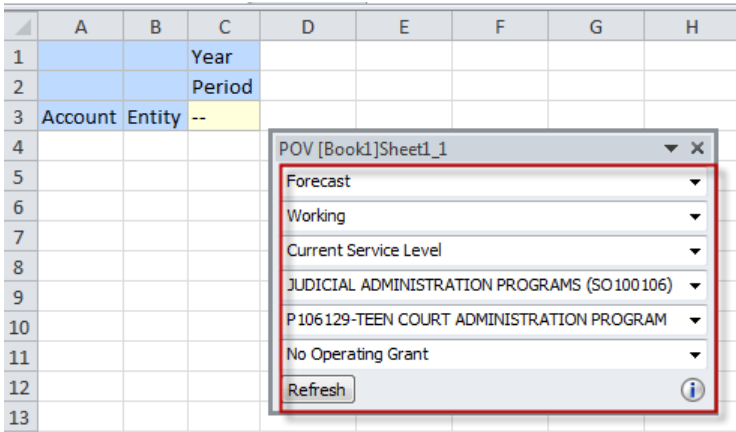
15. In the selection pane, click the member **Scenario** then click the **Left Arrow**. This will remove the Scenario member from the selection area.



Step	Action	Notes
16.	<p>Click the check box next to <b>Budget</b> and <b>Forecast</b>. Click the <b>Right-Arrow</b>.</p> <p>The <b>Budget</b> and <b>Forecast</b> members are moved to the <b>Selection Pane</b>.</p> 	<p>You may select multiple members from a dimension for Smart View analysis.</p>
17.	<p>From the dimension drop-down list select the <b>Version</b> dimension.</p> 	

Step	Action	Notes
18.	Click the <b>left-arrow</b> to remove the current selection.	
		
19.	Click the <b>+</b> next to <b>Working Proposed</b> and click the check box next to <b>Working</b> .	
		

Step	Action	Notes
20.	<p>Click the <b>right-arrow</b> to move it to the <b>Selection Pane</b>.</p> 	
21.	<p>Repeat the previous steps and make the following <b>POV Selections</b>:</p> <ul style="list-style-type: none"> <li>Request = <b>Current Service Level</b></li> <li>Fund = <b>Search for a valid Fund</b></li> <li>Activity = <b>Search for a valid Project</b></li> <li>Project = <b>No Operating Grant</b></li> </ul> <p><b>Hint:</b> When searching for a member in the hierarchy, you may type any part of the member name or description in the <b>Search Field</b> and click the <b>Search Icon</b>.</p> 	<p>Please write the member(s) selected for your department and index code.</p> <p>Fund: _____</p> <p>Activity: _____</p> <p>Project: _____</p>

Step	Action	Notes
22.	<p>Once all POV members have been selected, click <b>OK</b>.</p> 	
23.	<p>The <b>POV</b> box displays as follows:</p> 	

--END--

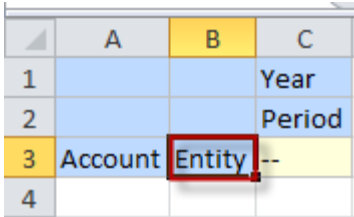


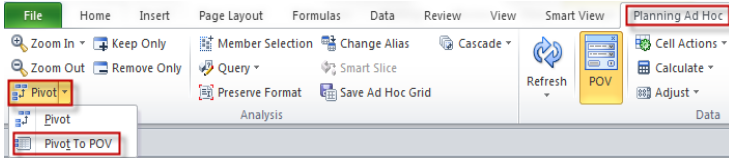


## Section 3B: Pivot Row and Column Dimensions to POV

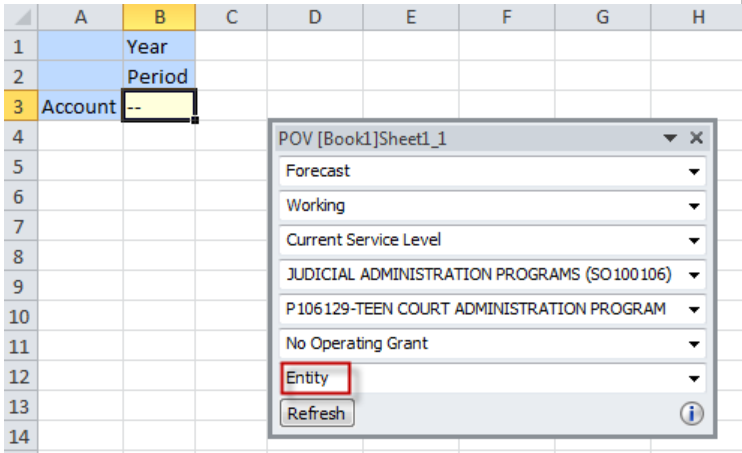
In this section you will use the **Pivot to POV** function to move the **Entity** and **Year** dimensions from the rows and columns the POV box. Additionally you will set both of the dimension values in the POV location. Once complete, you will save the Smart View sheet to your desktop.

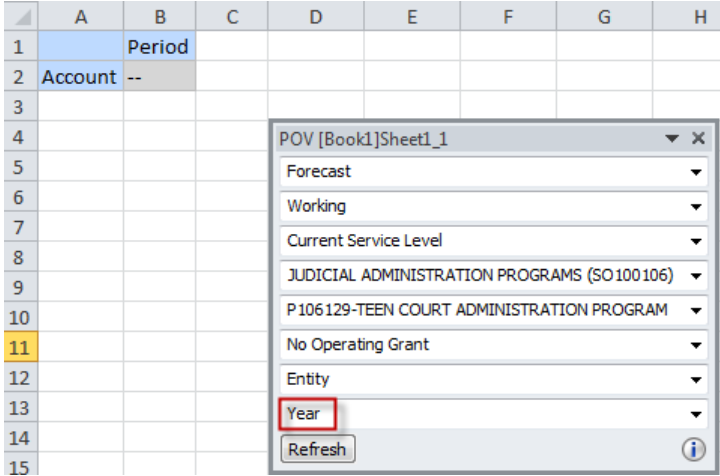
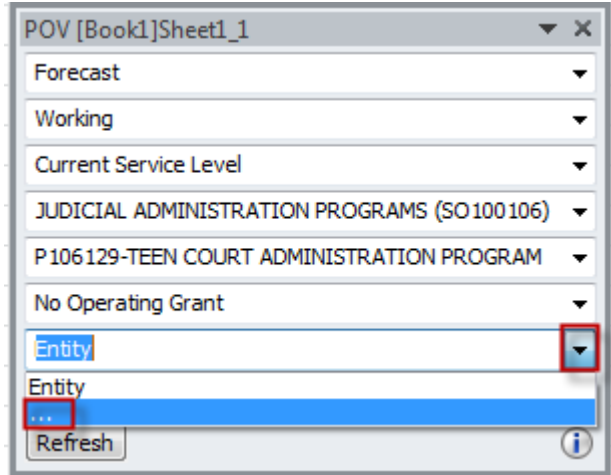
- We will now pivot the **Entity** dimension to the POV box. On the sheet, single-click the **Entity** member in cell **B3**.

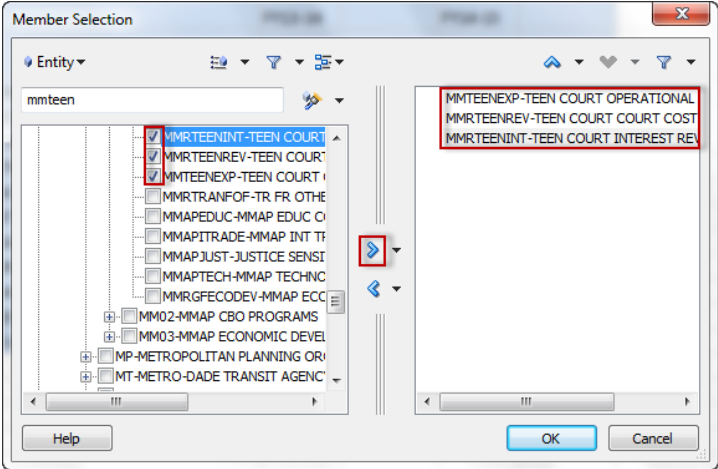
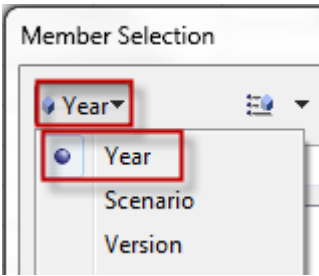

- On the **Planning Ad Hoc** ribbon, click **Pivot > Pivot to POV**.

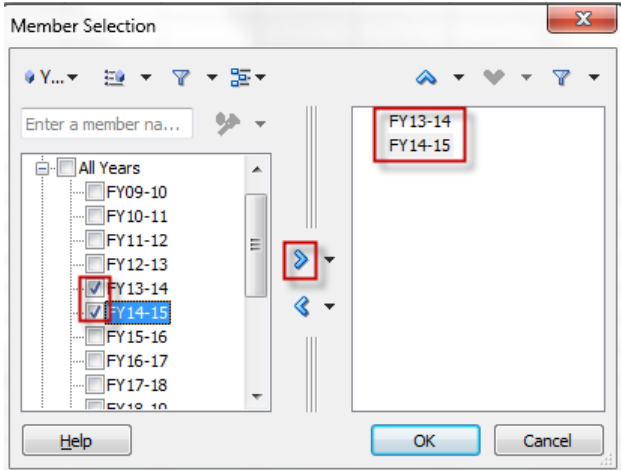
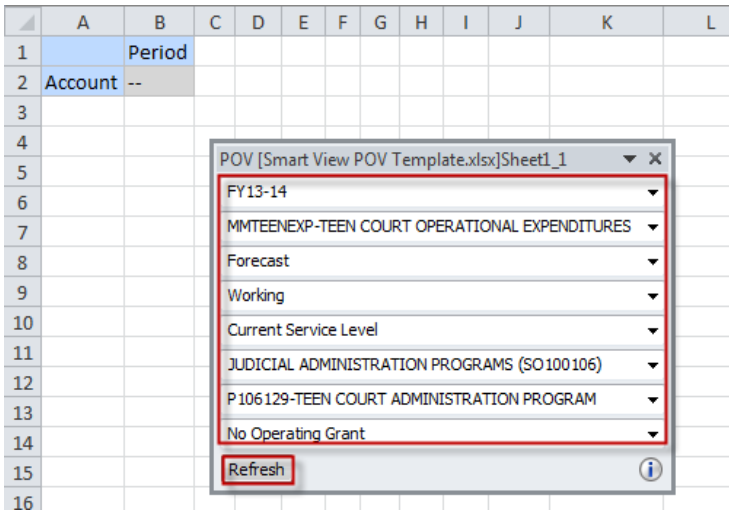


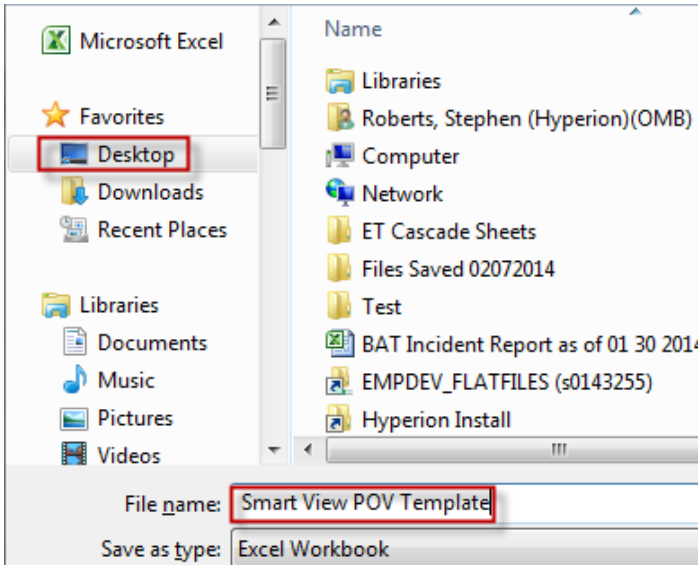
You may also use the **Pivot** function using the mouse. Select the Entity member in **B3**, then click and hold your **right-mouse** button. Drag the dimension to the POV box and release. The dimension is moved to the **POV**.
- The **Entity** dimension is moved from the rows to the **POV** box.



Step	Action	Notes
4.	<p>Repeat steps 1 and 2 to pivot the <b>Year</b> dimension (cell <b>C1</b>) to the POV box.</p> 	
5.	<p>To set the <b>Entity</b> member, click the drop-down arrow and select the <b>ellipsis (...)</b>.</p> 	

Step	Action	Notes
6.	<p>Place a check mark next to the member (or members) needed for the analysis. Click the <b>right-arrow</b> to move to the <b>Selection Panel</b>.</p> 	<p>You may select multiple members from the dimension.</p>
7.	<p>From the dimension drop-down list, select <b>Year</b>.</p> 	

Step	Step	Step
8.	<p>Select the following <b>Years</b> and move the <b>Selection Pane</b>:</p> <ul style="list-style-type: none"> <li>• <b>FY 13-14</b></li> <li>• <b>FY 14-15</b></li> </ul> 	
9.	<p>Be sure that the <b>POV Members</b> are set as displayed in the screenshot below:</p> 	<p>Click the <b>Refresh</b> button at any time to be sure the most current information is retrieved from the BAT system.</p>

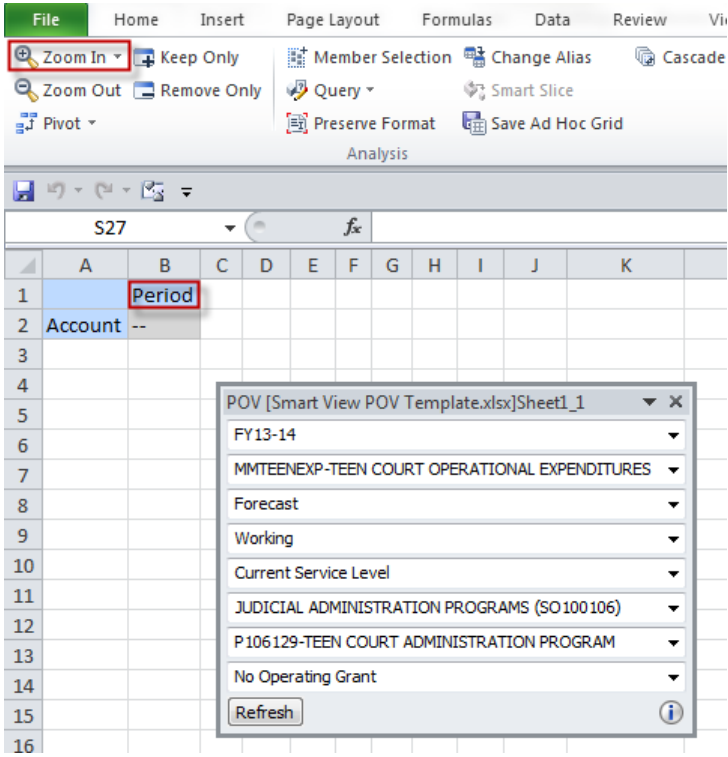
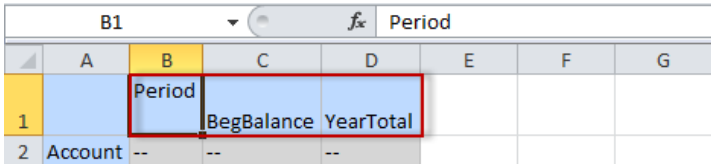
Step	Step	Step
10.	<p>Click <b>File &gt; Save As</b>. Save the file to your desktop. File Name: <b>Smart View POV Template</b>.</p> 	

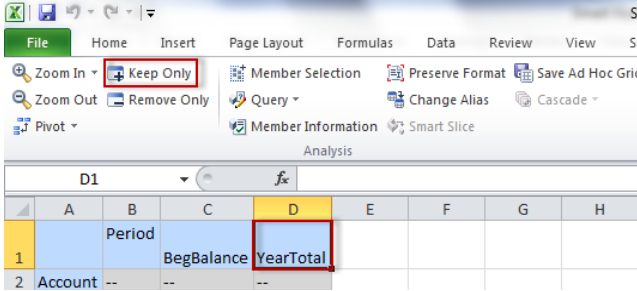
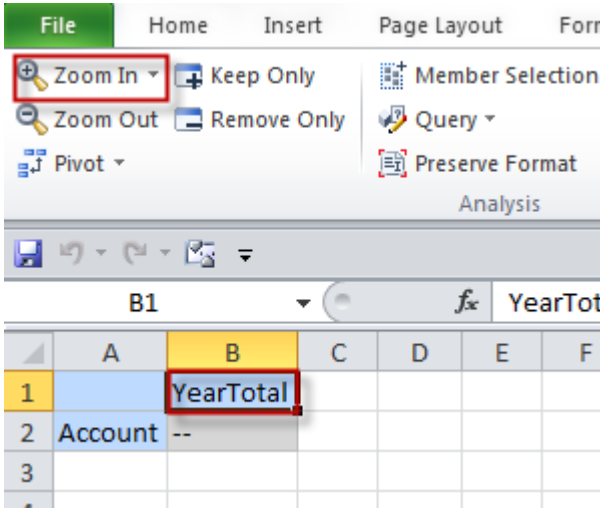
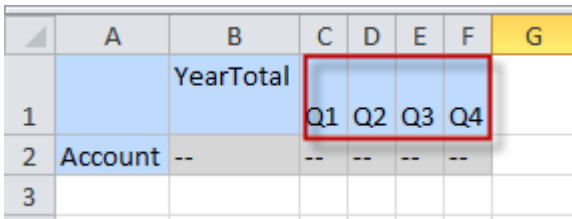
**--END--**



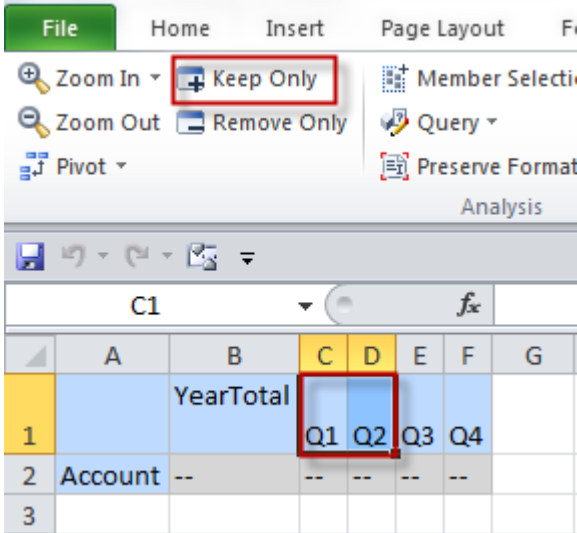
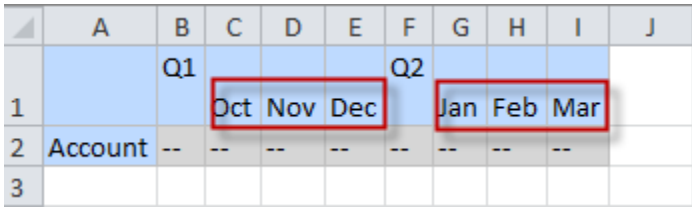
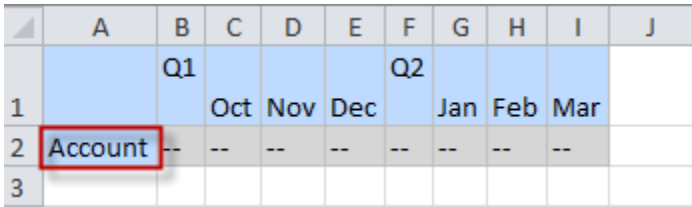
## Section 3C: Using the Zoom, Keep and Remove Functions

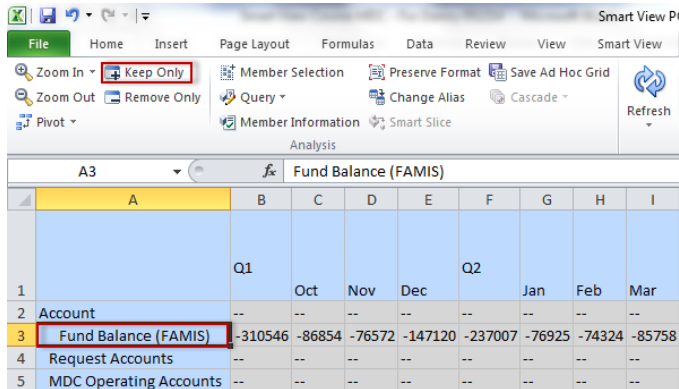
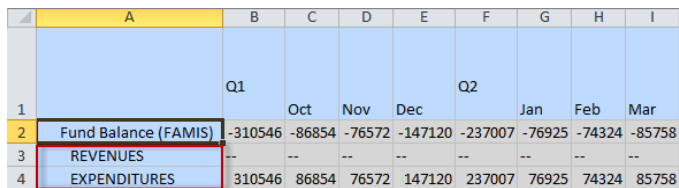
In this section you will use the Zoom In and Zoom Out functions to expand and collapse the dimensions on the sheet. You will also use the Keep and Remove Only functions to design the report as desired.

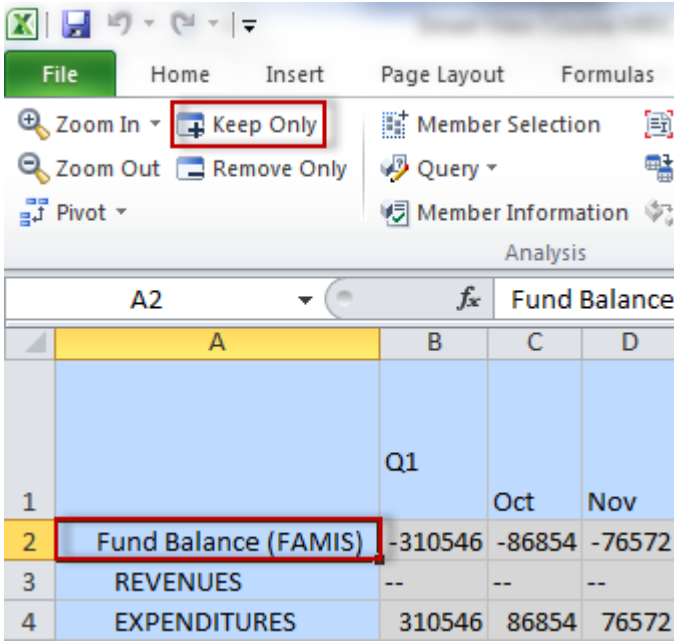
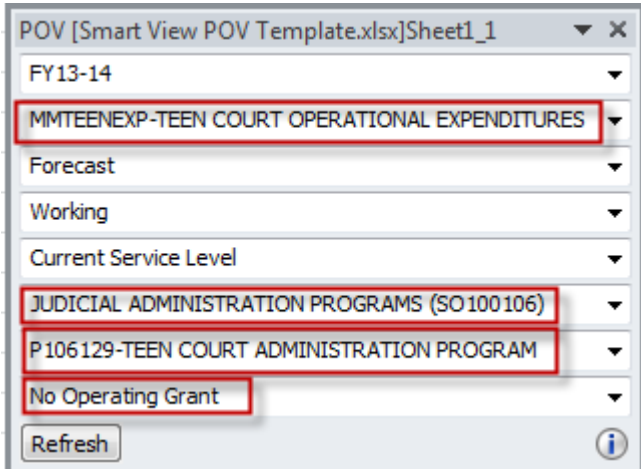
1.	Be sure that the <b>Smart View POV Template</b> file is open and connected to the OpPlan database.	
2.	Go to cell <b>B1</b> and click the member <b>Period</b> . On the <b>Planning Ad Hoc</b> ribbon, click the <b>Zoom In</b> button.	
3.	The children of the <b>Period</b> dimension display across the columns.	


Step	Action	Notes
4.	<p>For our analysis we will keep just the <b>YearTotal</b> member.</p> <p>Click the <b>YearTotal</b> member and click the <b>Keep Only</b> button.</p> 	
5.	<p>To open <b>YearTotal</b>, select the member and click <b>Zoom In</b>.</p> 	<p>You may also <b>double-click</b> the left mouse button to zoom in on the member.</p>
6.	<p>The children of <b>YearTotal</b> display (<b>Q1 – Q4</b>).</p> 	



Step	Action	Notes
7.	<p>Let's assume that we need to do analysis on <b>Q1</b> and <b>Q2</b> only.</p> <p>Click and drag to select <b>Q1</b> and <b>Q2</b>. Click <b>Keep Only</b>.</p>  <p>The screenshot shows the BAT Smart View interface. The 'Analysis' ribbon is active, and the 'Keep Only' button is highlighted with a red box. Below the ribbon, a pivot table is displayed with columns A through G and rows 1 through 3. The pivot table has a 'YearTotal' row and an 'Account' row. The 'Q1' and 'Q2' columns are selected with a red box.</p>	
8.	<p>Select <b>Q1</b> and click <b>Zoom In</b> and do the same for <b>Q2</b>.</p> <p>The months for each quarter display on the sheet.</p>  <p>The screenshot shows the BAT Smart View interface with the 'Account' dimension expanded. The 'Q1' and 'Q2' columns are selected with a red box. The months for each quarter are displayed on the sheet: Oct, Nov, Dec for Q1 and Jan, Feb, Mar for Q2.</p>	You may <b>double-click</b> your left mouse to Zoom In on a member.
9.	<p>To expand on the <b>Account</b> dimension. Click the cell <b>A2</b> and select <b>Zoom In</b>.</p>  <p>The screenshot shows the BAT Smart View interface with the 'Account' dimension expanded. The 'Account' cell in row 2, column A is selected with a red box. The months for each quarter are displayed on the sheet: Oct, Nov, Dec for Q1 and Jan, Feb, Mar for Q2.</p>	

Step	Action	Notes
10.	<p>Select <b>Fund Balance (FAMIS)</b> and click <b>Keep Only</b>.</p> 	
11.	<p>Double-click <b>Fund Balance (FAMIS)</b> to view the children of the member.</p> 	Using the double-click function allows the same action as Zoom In.

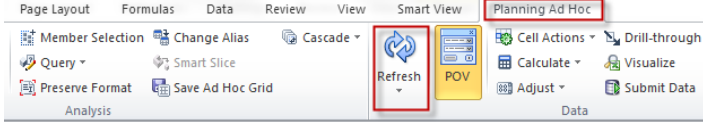
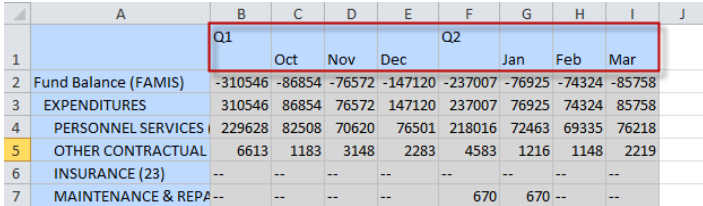
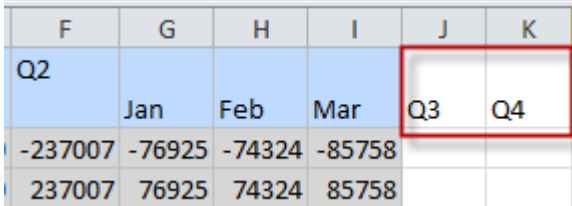
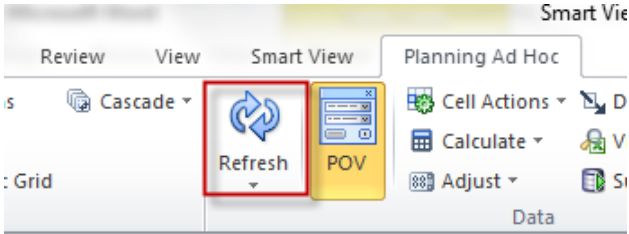
Step	Action	Notes
12.	<p>Select <b>Fund Balance (FAMIS)</b> and choose <b>Keep Only</b>.</p>  <p>The screenshot shows the BAT Smart View interface. The ribbon at the top has tabs for File, Home, Insert, Page Layout, and Formulas. Under the Home tab, the 'Keep Only' button is highlighted with a red box. Below the ribbon, the data table is visible. The table has columns A, B, C, and D. Row 2 is highlighted with a red box and contains the text 'Fund Balance (FAMIS)' in column A, and numerical values in columns B, C, and D. The table also includes rows for 'REVENUES' and 'EXPENDITURES'.</p>	
13.	<p>Be sure that your <b>POV</b> box displays as follows:</p> <p>Your <b>Entity, Fund, Project</b> and <b>Activity</b> will be different based on your department.</p>  <p>The screenshot shows the POV (Point of View) box in the BAT Smart View interface. The box has a title bar that reads 'POV [Smart View POV Template.xlsx]Sheet1_1'. It contains a list of entities and funds. The entity 'MMTEENEXP-TEEN COURT OPERATIONAL EXPENDITURES' is selected and highlighted with a red box. Other entities in the list include 'FY13-14', 'Forecast', 'Working', 'Current Service Level', 'JUDICIAL ADMINISTRATION PROGRAMS (SO 100106)', 'P106129-TEEN COURT ADMINISTRATION PROGRAM', and 'No Operating Grant'. A 'Refresh' button is located at the bottom of the list.</p>	

Step	Action	Notes
14.	<p>Use the <b>Zoom In</b>, <b>Keep</b> and <b>Remove Only</b> features so that the <b>Accounts</b> display as follows.</p> 	
15.	Select <b>File &gt; Save As</b> . Name the file <b>Activity 3C</b> .	

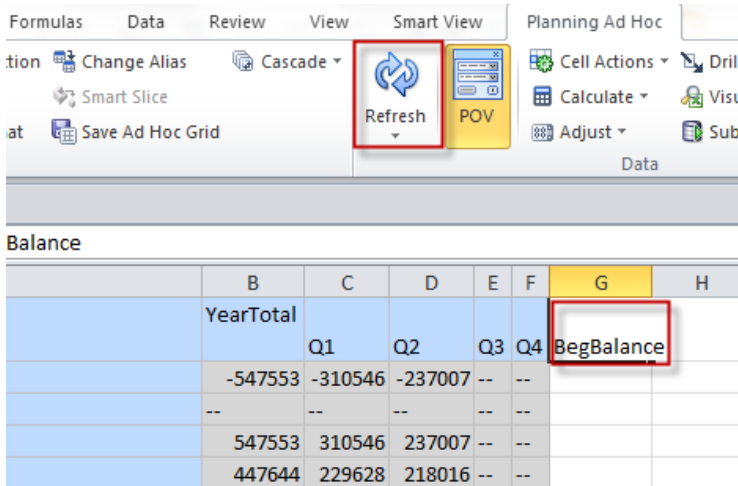
**--END--**

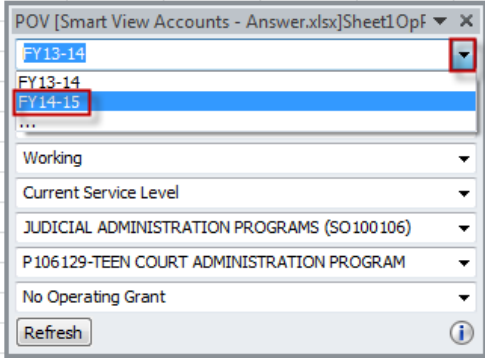
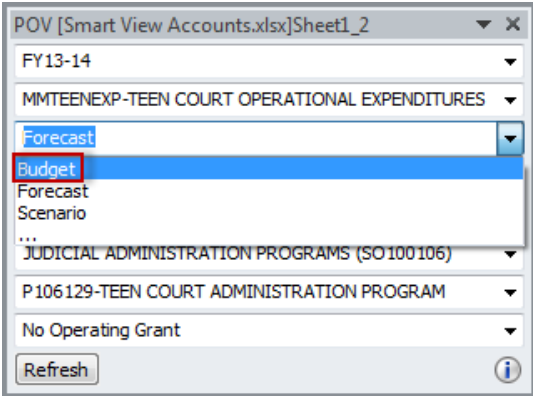
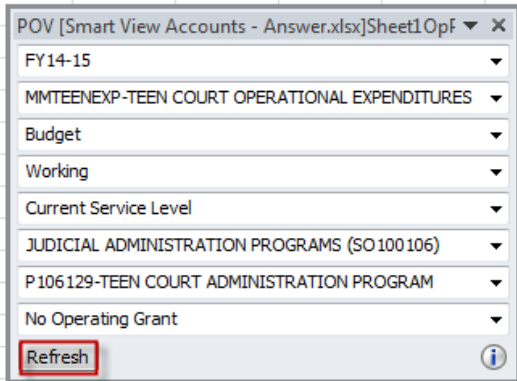
### Section 3D: Changing Members on the Sheet

In this section you will type members directly in the Excel Sheet and review the data changes. You will also use the left and right mouse buttons to Zoom In and Zoom Out members in the Period dimension.

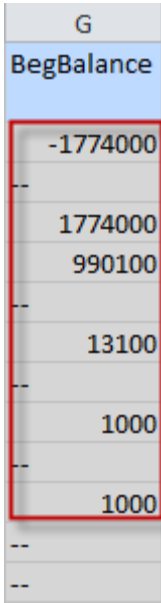
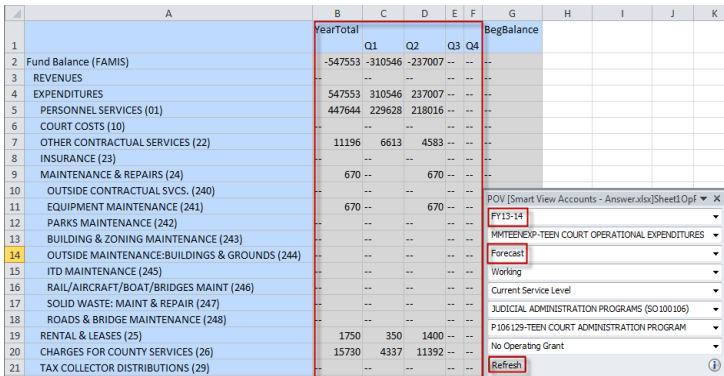
1.	Be sure that the <b>Activity 3C.xlsx</b> file is open and connected to the <b>BAT OpPlan</b> database.	
2.	From the Planning Ad Hoc ribbon, click the <b>Refresh</b> icon.  	
3.	On the sheet you will see that <b>Q1</b> and <b>Q2</b> and their descendants are displayed on the sheet.  	
4.	We now want to do analysis on <b>Q3</b> and <b>Q4</b> . To add these periods, you may type them directly on the sheet.  In cell J1 type <b>Q3</b> and K1 type <b>Q4</b> .  	
5.	Click <b>Refresh</b> on the Planning Ribbon.  	

Step	Action	Notes																																								
6.	<p>Double-click <b>Q3</b> and <b>Q4</b> to expand and display the corresponding months.</p> <table><tr><td>I</td><td>J</td><td>K</td><td>L</td><td>M</td><td>N</td><td>O</td><td>P</td><td>Q</td><td>R</td></tr><tr><td></td><td>Q3</td><td></td><td></td><td></td><td>Q4</td><td></td><td></td><td></td><td></td></tr><tr><td>Mar</td><td></td><td>Apr</td><td>May</td><td>Jun</td><td></td><td>Jul</td><td>Aug</td><td>Sep</td><td></td></tr><tr><td>-85758</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td></td></tr></table>	I	J	K	L	M	N	O	P	Q	R		Q3				Q4					Mar		Apr	May	Jun		Jul	Aug	Sep		-85758	--	--	--	--	--	--	--	--		
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	Q3				Q4																																					
Mar		Apr	May	Jun		Jul	Aug	Sep																																		
-85758	--	--	--	--	--	--	--	--																																		
7.	<p>You may use <b>right-mouse button functionality</b> to Zoom Out (or collapse) members in the dimension.</p> <p>Click the cell <b>P1</b> that contains <b>Aug</b>. Using your right mouse button. Double-click the member.</p> <table><tr><td>I</td><td>J</td><td>K</td><td>L</td><td>M</td><td>N</td><td>O</td></tr><tr><td></td><td>Q3</td><td></td><td></td><td></td><td>Q4</td><td></td></tr><tr><td>Mar</td><td></td><td>Apr</td><td>May</td><td>Jun</td><td></td><td></td></tr><tr><td>-85758</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td></td></tr></table>	I	J	K	L	M	N	O		Q3				Q4		Mar		Apr	May	Jun			-85758	--	--	--	--	--		<b>Jul, Aug</b> and <b>Sep</b> are collapsed into <b>Q4</b> .												
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	Q3				Q4																																					
Mar		Apr	May	Jun																																						
-85758	--	--	--	--	--																																					
8.	<p>If you <b>right-double click</b> any member for the Quarters (Q1, Q2, Q3 or Q4) the time period will collapse up to <b>YearTotal</b>.</p> <p>Double right-click <b>Q3</b>. All Quarters are removed from the sheet and <b>YearTotal</b> displays.</p> <table><tr><td></td><td>A</td><td>B</td><td>C</td><td>D</td></tr><tr><td>1</td><td></td><td>YearTotal</td><td></td><td></td></tr><tr><td>2</td><td>Fund Balance (FAMIS)</td><td>-547553</td><td></td><td></td></tr><tr><td>3</td><td>EXPENDITURES</td><td>547553</td><td></td><td></td></tr><tr><td>4</td><td>PERSONNEL SERVICES (01)</td><td>447644</td><td></td><td></td></tr><tr><td>5</td><td>OTHER CONTRACTUAL SER</td><td>11196</td><td></td><td></td></tr><tr><td>6</td><td>INSURANCE (23)</td><td>--</td><td></td><td></td></tr></table>		A	B	C	D	1		YearTotal			2	Fund Balance (FAMIS)	-547553			3	EXPENDITURES	547553			4	PERSONNEL SERVICES (01)	447644			5	OTHER CONTRACTUAL SER	11196			6	INSURANCE (23)	--								
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Step	Action	Notes																																																
9.	<p>To redisplay the <b>4 Quarters</b>, using your left mouse button, double-click <b>YearTotal</b>.</p> <p>The <b>4 Quarters</b> display.</p> <table border="1"> <tr> <th></th><th>A</th><th>B</th><th>C</th><th>D</th><th>E</th><th>F</th><th>G</th></tr> <tr> <td>1</td><td></td><td>YearTotal</td><td>Q1</td><td>Q2</td><td>Q3</td><td>Q4</td><td></td></tr> <tr> <td>2</td><td>Fund Balance (FAMIS)</td><td>-547553</td><td>-310546</td><td>-237007</td><td>--</td><td>--</td><td></td></tr> <tr> <td>3</td><td>EXPENDITURES</td><td>547553</td><td>310546</td><td>237007</td><td>--</td><td>--</td><td></td></tr> <tr> <td>4</td><td>PERSONNEL SERVICES (01)</td><td>447644</td><td>229628</td><td>218016</td><td>--</td><td>--</td><td></td></tr> </table>		A	B	C	D	E	F	G	1		YearTotal	Q1	Q2	Q3	Q4		2	Fund Balance (FAMIS)	-547553	-310546	-237007	--	--		3	EXPENDITURES	547553	310546	237007	--	--		4	PERSONNEL SERVICES (01)	447644	229628	218016	--	--										
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10.	<p>In Cell <b>G1</b>, type <b>BegBalance</b>. Click <b>Refresh</b>.</p>  <p>The screenshot shows the 'Smart View' tab with the 'Refresh' button highlighted. Below it, a table is displayed with the following data:</p> <table border="1"> <tr> <th></th><th>B</th><th>C</th><th>D</th><th>E</th><th>F</th><th>G</th><th>H</th></tr> <tr> <td></td><td>YearTotal</td><td>Q1</td><td>Q2</td><td>Q3</td><td>Q4</td><td>BegBalance</td><td></td></tr> <tr> <td></td><td>-547553</td><td>-310546</td><td>-237007</td><td>--</td><td>--</td><td></td><td></td></tr> <tr> <td></td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td></td><td></td></tr> <tr> <td></td><td>547553</td><td>310546</td><td>237007</td><td>--</td><td>--</td><td></td><td></td></tr> <tr> <td></td><td>447644</td><td>229628</td><td>218016</td><td>--</td><td>--</td><td></td><td></td></tr> </table>		B	C	D	E	F	G	H		YearTotal	Q1	Q2	Q3	Q4	BegBalance			-547553	-310546	-237007	--	--				--	--	--	--	--				547553	310546	237007	--	--				447644	229628	218016	--	--			<p>Current Budget data is stored in the Period member <b>BegBalance</b>.</p>
	B	C	D	E	F	G	H																																											
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Step	Action	Notes
11.	<p>On the <b>POV box</b>, click the drop-down arrow next to <b>Year</b>. Change the selection to <b>FY 14-15</b>.</p> 	
12.	<p>Click the drop-down arrow next to <b>Scenario</b>. Change the selection to <b>Budget</b>.</p> 	
13.	<p>Click <b>Refresh</b>.</p> 	<p>You may click the <b>Refresh</b> button on the <b>Smart View Ribbon</b> or the <b>POV box</b>. Both actions produce the same result.</p>



Step	Action	Notes
14.	<p>The <b>Budget</b> data displays in the <b>BegBalance</b> column.</p> 	
15.	<p>Change the Point of View to:</p> <ul style="list-style-type: none"> <li>• Scenario – <b>Forecast</b></li> <li>• Year – <b>FY13 -14</b></li> </ul> <p>Click <b>Refresh</b>. The Forecast data displays.</p> 	
16.	<p>Click <b>File &gt; Save As</b>. On your desktop, save with the file name <b>Activity 3D</b>.</p>	

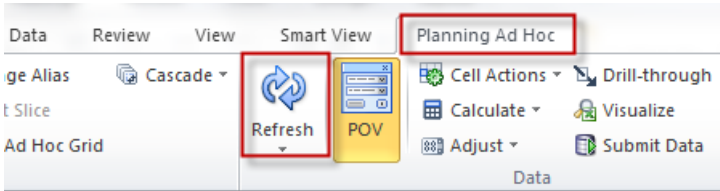
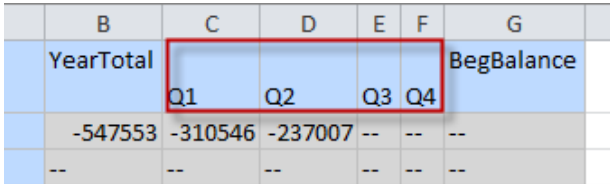
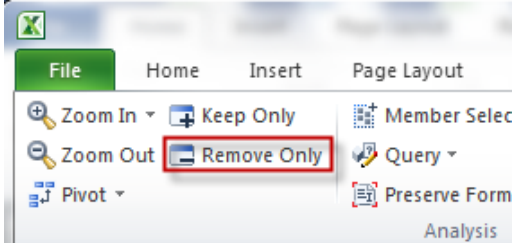
--END--

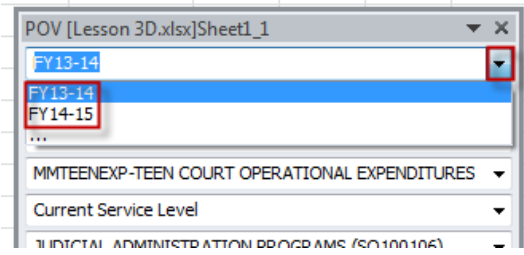
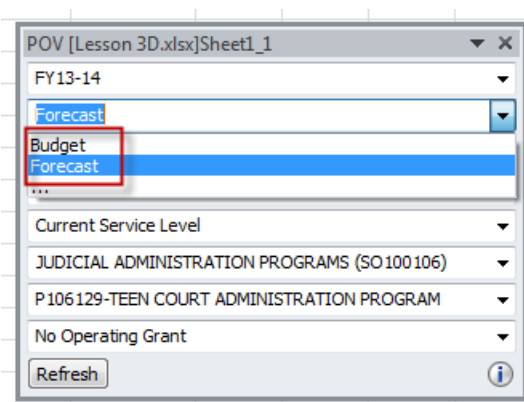
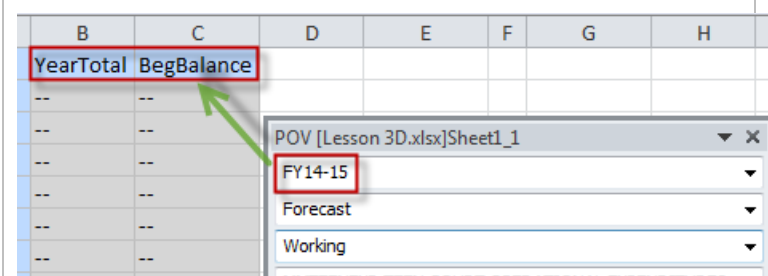


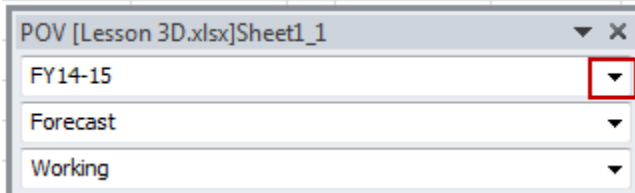
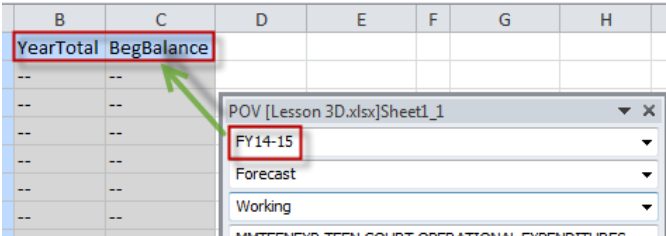
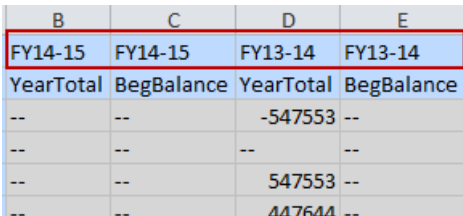
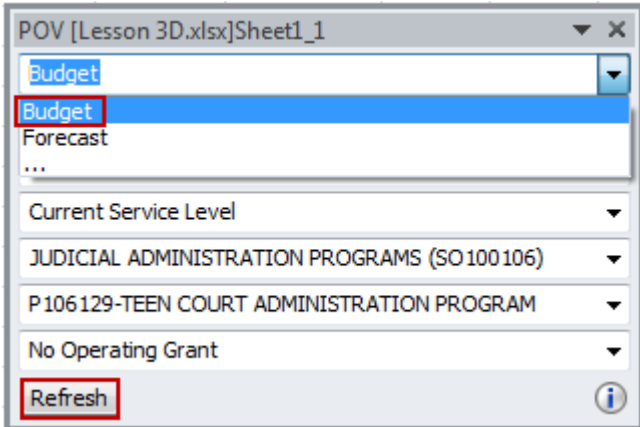
## Activity 4: Using the Pivot Function in Smart View.

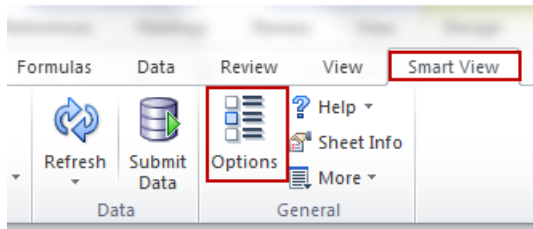
In this activity, you will:

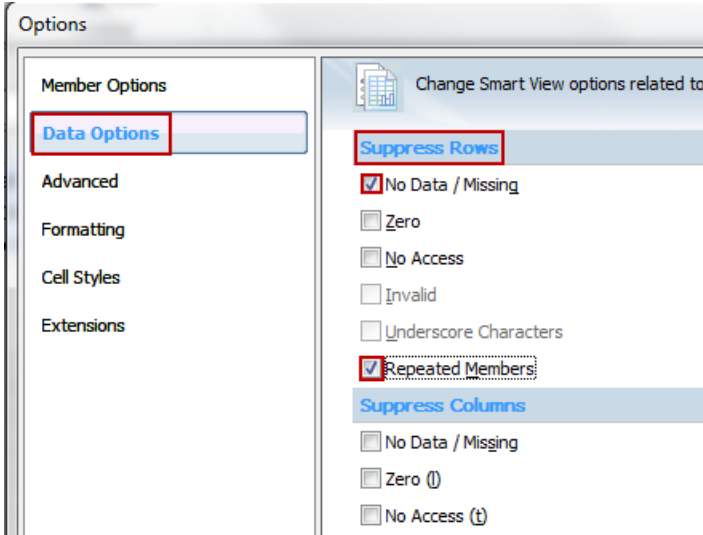
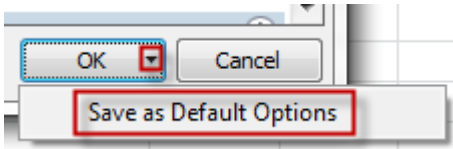
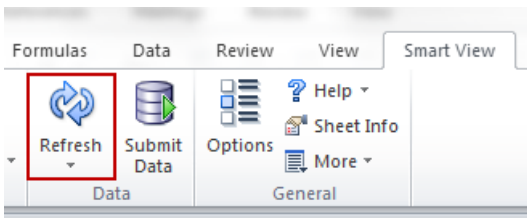
- Open an Active Smart View Sheet
- Use Pivot function in and out of the Point of View box
- Pivot members between Rows and Columns
- Work with nested dimensions in the Rows and Columns
- Set Smart View Options to adjust display of data on the Ad Hoc Sheet

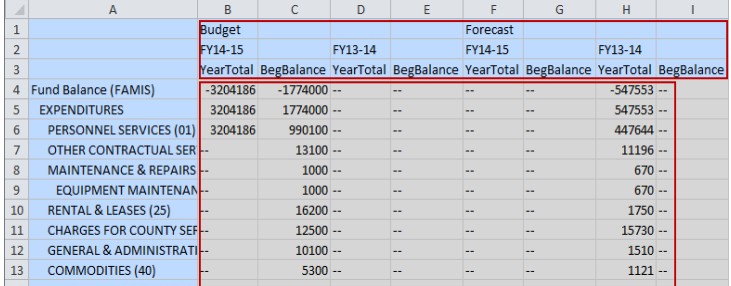
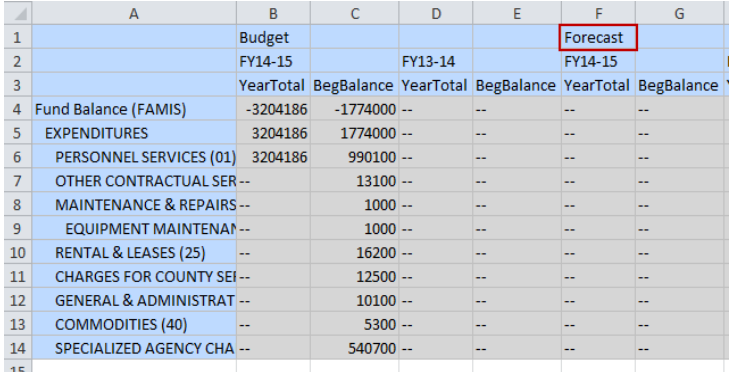
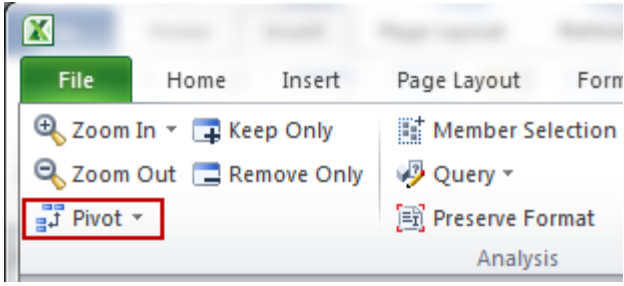
1.	Be sure that the <b>Activity 3D</b> file is open. Select <b>File &gt; Save As</b> and save the file with the name <b>Activity 4</b> .	
2.	Click <b>Refresh</b> to display the current data on the sheet.	You may be prompted to log in to the application. Enter your <b>User Name</b> and <b>Password</b> and click <b>Connect</b> .
		
3.	Click and drag to select <b>Q1, Q2, Q3</b> and <b>Q4</b> .	
		
4.	On the <b>Planning Ad Hoc Ribbon</b> , click <b>Remove Only</b> .	
		

Step	Action	Notes
5.	<p>We will now pivot the <b>Year</b> and <b>Scenario</b> dimension members to the columns.</p> <p>From the <b>POV</b> box, click the drop-down arrow next to the <b>Year Dimension</b>. Verify that both <b>FY 13-14</b> and <b>FY 14-15</b> display in the list.</p> 	
6.	<p>Click the drop-down arrow next to the <b>Scenario Dimension</b>. Verify that both <b>Forecast</b> and <b>Budget</b> display in the list.</p> 	
7.	<p>You will now move the <b>Year</b> dimension (FY 13-14 and FY 14-15) from the <b>POV</b> box to the <b>Columns</b>.</p> 	

Step	Action	Notes
8.	<p>Using your mouse, float your mouse arrow over the <b>drop-down arrow</b> next to the <b>Year</b> Dimension.</p> 	
9.	<p>Right-click and <u>hold</u> your right-mouse button. Drag the dimension to the column members then release the mouse.</p>  <p>The <b>Year</b> members display across the columns.</p> 	<p>If you are unsuccessful in the pivot maneuver, you may try again until you are successful.</p>
10.	<p>On the <b>POV</b> box, change the <b>Scenario</b> dimension to <b>Budget</b>. Click <b>Refresh</b>.</p> 	

Step	Action	Notes																																																																																																																																																						
11.	<p>The <b>Budget</b> data displays.</p> <table><tr><th>B</th><th>C</th><th>D</th><th>E</th></tr><tr><th>FY14-15</th><th>FY14-15</th><th>FY13-14</th><th>FY13-14</th></tr><tr><th>YearTotal</th><th>BegBalance</th><th>YearTotal</th><th>BegBalance</th></tr><tr><td>-3204186</td><td>-1774000</td><td>--</td><td>--</td></tr><tr><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>3204186</td><td>1774000</td><td>--</td><td>--</td></tr><tr><td>3204186</td><td>990100</td><td>--</td><td>--</td></tr><tr><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>--</td><td>13100</td><td>--</td><td>--</td></tr><tr><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>--</td><td>1000</td><td>--</td><td>--</td></tr><tr><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>--</td><td>1000</td><td>--</td><td>--</td></tr><tr><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>--</td><td>--</td><td>--</td><td>--</td></tr></table>	B	C	D	E	FY14-15	FY14-15	FY13-14	FY13-14	YearTotal	BegBalance	YearTotal	BegBalance	-3204186	-1774000	--	--	--	--	--	--	3204186	1774000	--	--	3204186	990100	--	--	--	--	--	--	--	13100	--	--	--	--	--	--	--	1000	--	--	--	--	--	--	--	1000	--	--	--	--	--	--	--	--	--	--	--	--	--	--																																																																																							
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12.	<p>Repeat step 9 to pivot the <b>Scenario</b> dimension from the <b>POV</b> to the <b>columns</b>.</p> <table><tr><th></th><th>A</th><th>B</th><th>C</th><th>D</th><th>E</th><th>F</th><th>G</th><th>H</th><th>I</th></tr><tr><td>1</td><td></td><td>Budget</td><td>Budget</td><td>Budget</td><td>Budget</td><td>Forecast</td><td>Forecast</td><td>Forecast</td><td>Forecast</td></tr><tr><td>2</td><td></td><td>FY14-15</td><td>FY14-15</td><td>FY13-14</td><td>FY13-14</td><td>FY14-15</td><td>FY14-15</td><td>FY13-14</td><td>FY13-14</td></tr><tr><td>3</td><td></td><td>YearTotal</td><td>BegBalance</td><td>YearTotal</td><td>BegBalance</td><td>YearTotal</td><td>BegBalance</td><td>YearTotal</td><td>BegBalance</td></tr><tr><td>4</td><td>Fund Balance (FAMIS)</td><td>-3204186</td><td>-1774000</td><td>--</td><td>--</td><td>--</td><td>--</td><td>-547553</td><td>--</td></tr><tr><td>5</td><td>REVENUES</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>6</td><td>EXPENDITURES</td><td>3204186</td><td>1774000</td><td>--</td><td>--</td><td>--</td><td>--</td><td>547553</td><td>--</td></tr><tr><td>7</td><td>PERSONNEL SERVICES (01)</td><td>3204186</td><td>990100</td><td>--</td><td>--</td><td>--</td><td>--</td><td>447644</td><td>--</td></tr><tr><td>8</td><td>COURT COSTS (10)</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>9</td><td>OTHER CONTRACTUAL SERVI</td><td>--</td><td>13100</td><td>--</td><td>--</td><td>--</td><td>--</td><td>11196</td><td>--</td></tr><tr><td>10</td><td>INSURANCE (23)</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>11</td><td>MAINTENANCE &amp; REPAIRS (2</td><td>--</td><td>1000</td><td>--</td><td>--</td><td>--</td><td>--</td><td>670</td><td>--</td></tr><tr><td>12</td><td>OUTSIDE CONTRACTUAL SV</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td></tr><tr><td>13</td><td>EQUIPMENT MAINTENANC</td><td>--</td><td>1000</td><td>--</td><td>--</td><td>--</td><td>--</td><td>670</td><td>--</td></tr><tr><td>14</td><td>PARKS MAINTENANCE (242</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td><td>--</td></tr></table>		A	B	C	D	E	F	G	H	I	1		Budget	Budget	Budget	Budget	Forecast	Forecast	Forecast	Forecast	2		FY14-15	FY14-15	FY13-14	FY13-14	FY14-15	FY14-15	FY13-14	FY13-14	3		YearTotal	BegBalance	YearTotal	BegBalance	YearTotal	BegBalance	YearTotal	BegBalance	4	Fund Balance (FAMIS)	-3204186	-1774000	--	--	--	--	-547553	--	5	REVENUES	--	--	--	--	--	--	--	--	6	EXPENDITURES	3204186	1774000	--	--	--	--	547553	--	7	PERSONNEL SERVICES (01)	3204186	990100	--	--	--	--	447644	--	8	COURT COSTS (10)	--	--	--	--	--	--	--	--	9	OTHER CONTRACTUAL SERVI	--	13100	--	--	--	--	11196	--	10	INSURANCE (23)	--	--	--	--	--	--	--	--	11	MAINTENANCE & REPAIRS (2	--	1000	--	--	--	--	670	--	12	OUTSIDE CONTRACTUAL SV	--	--	--	--	--	--	--	--	13	EQUIPMENT MAINTENANC	--	1000	--	--	--	--	670	--	14	PARKS MAINTENANCE (242	--	--	--	--	--	--	--	--	Data for both Budget and Forecast display on the sheet...
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13.	<p>To suppress rows that are missing data, select <b>Smart View &gt; Options</b>.</p> 																																																																																																																																																							

Step	Action	Notes
14.	<p>Click <b>Data Options</b>. In the <b>Suppress Rows</b> section, click the check box next to:</p> <ul style="list-style-type: none"> <li>No Data / Missing</li> <li>Repeated Members</li> </ul> 	
15.	<p>To save the changes, click the <b>down-arrow</b> next to the <b>OK</b> button and click <b>Save As Default Options</b>.</p> 	
16.	<p>Click <b>Refresh</b>.</p> 	

Step	Action	Notes
17.	<p>The rows with no data are suppressed on the sheet. Additionally, the repeated members in the column headers no longer repeat.</p> 	
18.	<p>Now Pivot the <b>Scenario</b> members to the rows. Click either <b>Forecast</b> or <b>Budget</b> (not both).</p> 	
19.	<p>From the Planning ribbon, click <b>Pivot</b>.</p> 	



Step 20.

Action

The **Scenario** members are pivoted from the columns to the rows. You will notice that a separate group of **Accounts** display for **Budget** and **Forecast**.

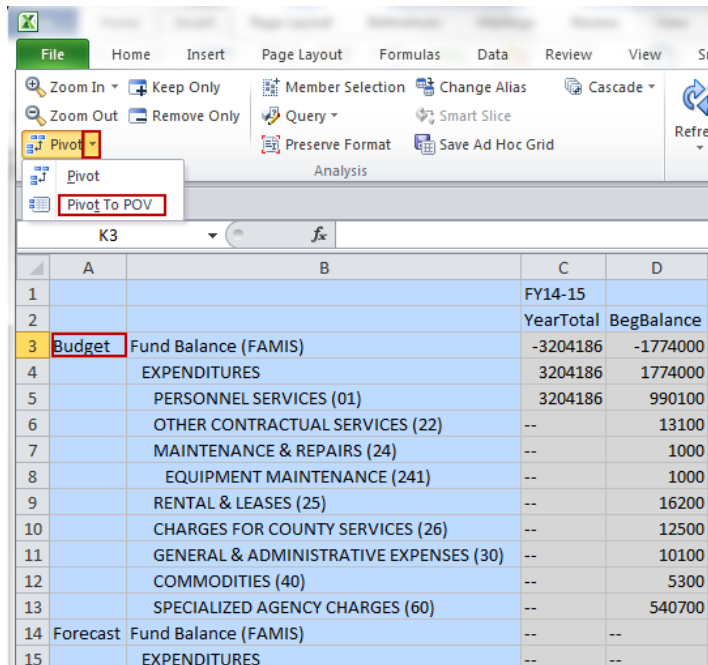
	A	B	C	D	E	F
1			FY14-15		FY13-14	
2			YearTotal	BegBalance	YearTotal	BegBalance
3	Budget	Fund Balance (FAMIS)	-3204186	-1774000	--	--
4		EXPENDITURES	3204186	1774000	--	--
5		PERSONNEL SERVICES (01)	3204186	990100	--	--
6		OTHER CONTRACTUAL SERVICES (22)	--	13100	--	--
7		MAINTENANCE & REPAIRS (24)	--	1000	--	--
8		EQUIPMENT MAINTENANCE (241)	--	1000	--	--
9		RENTAL & LEASES (25)	--	16200	--	--
10		CHARGES FOR COUNTY SERVICES (26)	--	12500	--	--
11		GENERAL & ADMINISTRATIVE EXPENSES (30)	--	10100	--	--
12		COMMODITIES (40)	--	5300	--	--
13		SPECIALIZED AGENCY CHARGES (60)	--	540700	--	--
14	Forecast	Fund Balance (FAMIS)	--	--	-547553	--
15		EXPENDITURES	--	--	547553	--
16		PERSONNEL SERVICES (01)	--	--	447644	--
17		OTHER CONTRACTUAL SERVICES (22)	--	--	11196	--
18		MAINTENANCE & REPAIRS (24)	--	--	670	--
19		EQUIPMENT MAINTENANCE (241)	--	--	670	--
20		RENTAL & LEASES (25)	--	--	1750	--
21		CHARGES FOR COUNTY SERVICES (26)	--	--	15730	--
22		GENERAL & ADMINISTRATIVE EXPENSES (30)	--	--	1510	--
23		COMMODITIES (40)	--	--	1121	--
24		SPECIALIZED AGENCY CHARGES (60)	--	--	67933	--

Notes

You may also use the right-click and hold functionality to pivot the dimension between columns and rows.

21.

Click the Scenario member **Budget**. Click the down-arrow next to the **Pivot** button and select **Pivot to POV**.



	A	B	C	D
1			FY14-15	
2			YearTotal	BegBalance
3	Budget	Fund Balance (FAMIS)	-3204186	-1774000
4		EXPENDITURES	3204186	1774000
5		PERSONNEL SERVICES (01)	3204186	990100
6		OTHER CONTRACTUAL SERVICES (22)	--	13100
7		MAINTENANCE & REPAIRS (24)	--	1000
8		EQUIPMENT MAINTENANCE (241)	--	1000
9		RENTAL & LEASES (25)	--	16200
10		CHARGES FOR COUNTY SERVICES (26)	--	12500
11		GENERAL & ADMINISTRATIVE EXPENSES (30)	--	10100
12		COMMODITIES (40)	--	5300
13		SPECIALIZED AGENCY CHARGES (60)	--	540700
14	Forecast	Fund Balance (FAMIS)	--	--
15		EXPENDITURES	--	--

You may pivot any dimension between rows, columns and POV at any time.

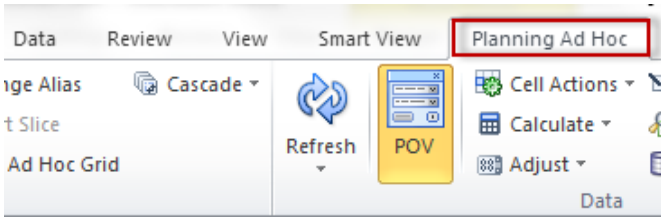
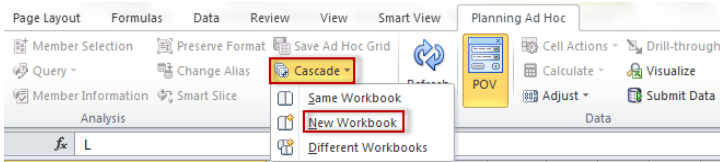
Step	Action	Notes																																																																																																												
22.	<p>The <b>Scenario</b> dimension is now moved to the POV box.</p> <table><thead><tr><th>C</th><th>D</th><th>E</th><th>F</th><th>G</th><th>H</th></tr></thead><tbody><tr><td></td><td>FY13-14</td><td></td><td></td><td></td><td></td></tr><tr><td>BegBalance</td><td>YearTotal</td><td>BegBalance</td><td></td><td></td><td></td></tr><tr><td>-1774000</td><td>--</td><td>--</td><td></td><td></td><td></td></tr><tr><td>1774000</td><td>--</td><td>--</td><td></td><td></td><td></td></tr><tr><td>990100</td><td>--</td><td>--</td><td></td><td></td><td></td></tr><tr><td>13100</td><td>--</td><td>--</td><td></td><td></td><td></td></tr><tr><td>1000</td><td>--</td><td></td><td></td><td></td><td></td></tr><tr><td>1000</td><td>--</td><td></td><td></td><td></td><td></td></tr><tr><td>16200</td><td>--</td><td></td><td></td><td></td><td></td></tr><tr><td>12500</td><td>--</td><td></td><td></td><td></td><td></td></tr><tr><td>10100</td><td>--</td><td></td><td></td><td></td><td></td></tr><tr><td>5300</td><td>--</td><td></td><td></td><td></td><td></td></tr><tr><td>540700</td><td>--</td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table> <div><p>POV [Lesson 3D.xlsx]Sheet1_1</p><p>Budget</p><p>Working</p><p>MMTEENEXP-TEEN COURT OPERATIONAL EXPENDITURES</p><p>Current Service Level</p><p>JUDICIAL ADMINISTRATION PROGRAMS (SO 100 106)</p><p>P 106 129-TEEN COURT ADMINISTRATION PROGRAM</p><p>No Operating Grant</p><p>Refresh</p></div>	C	D	E	F	G	H		FY13-14					BegBalance	YearTotal	BegBalance				-1774000	--	--				1774000	--	--				990100	--	--				13100	--	--				1000	--					1000	--					16200	--					12500	--					10100	--					5300	--					540700	--																													
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23.	Select <b>File &gt; Save.</b>																																																																																																													
24.	Select <b>File &gt; Close.</b>																																																																																																													

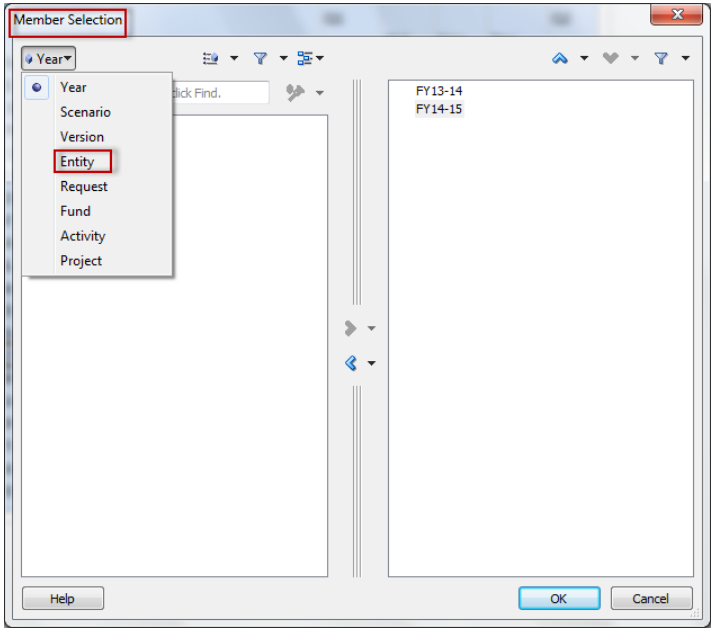
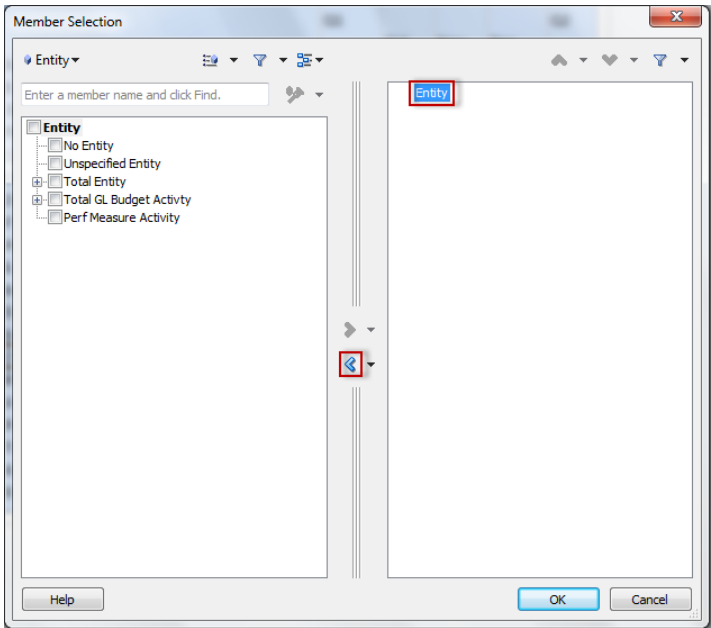
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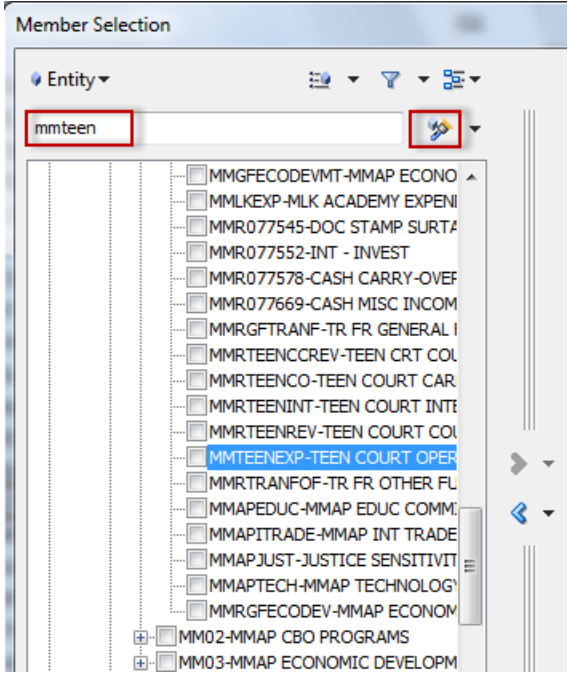
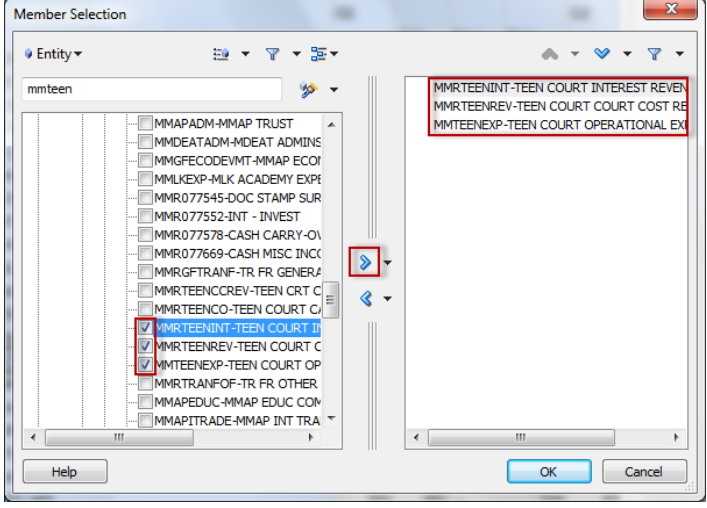
## Activity 5: Cascading Ad Hoc Grids.

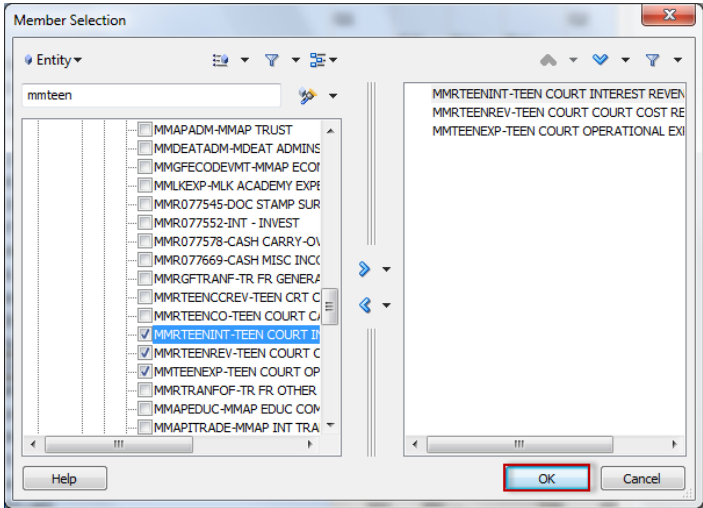
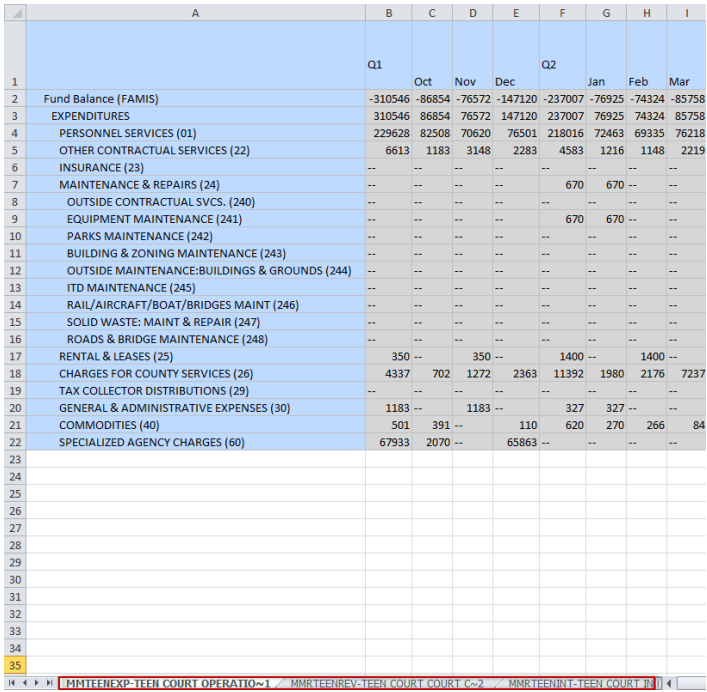
In this activity, you will:

- Open an existing Ad Hoc Smart View sheet
- Create a Cascade sheet by Entity
- Save the new file to your hard drive

Step	Action	Notes
1.	Open the <b>Activity 3D.xlsx</b> file. Be sure that you are connected to the <b>BAT OpPlan</b> database.	
2.	Click the <b>Planning Ad Hoc</b> menu option located on the Excel menu bar.  	
3.	From the <b>Planning Ad Hoc</b> tab, click <b>Cascade &gt; New Workbook</b> .  	The option <b>New Workbook</b> will create a new Excel sheet. A new tab will be created for each dimension member selected in the Cascade function.

Step	Action	Notes
4.	<p>From the dimension drop-drop list, select the <b>Entity</b> dimension.</p> 	
5.	<p>Click the <b>left-arrow</b> to remove the current selection.</p> 	

Step	Action	Notes
6.	<p>In the <b>Search field</b>, type the <b>Entity</b> member name and click the <b>Search Icon</b>.</p> 	
7.	<p>Place a check mark next to multiple members of the <b>Entity</b> dimension. A separate tab on the Excel sheet will be created for each Entity selected.</p> <p>Click the <b>right-arrow</b> to move to the <b>Selection Panel</b>.</p> 	

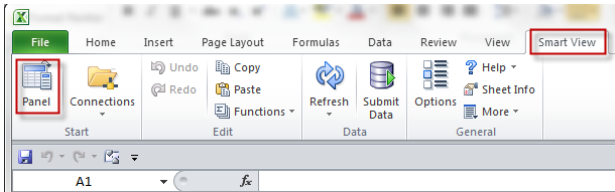
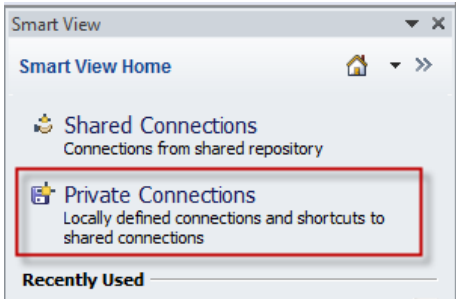
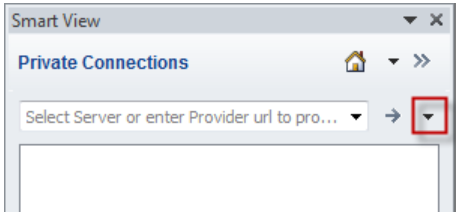
Step	Action	Notes
8.	<p>Click <b>OK</b> to create the <b>Cascade</b> sheet.</p> 	
9.	<p>A new Excel workbook is created for the <b>Cascade</b> report. A separate worksheet tab is created for each Entity member selected.</p> 	
10.	Click each tab to view the data sheets.	
11.	Click <b>File &gt; Save</b> . On the desktop save the file as <b>Cascade.xlsx</b> .	

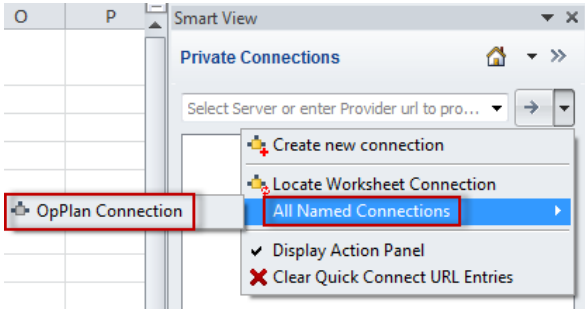
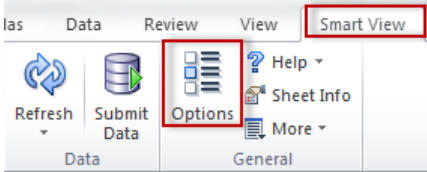
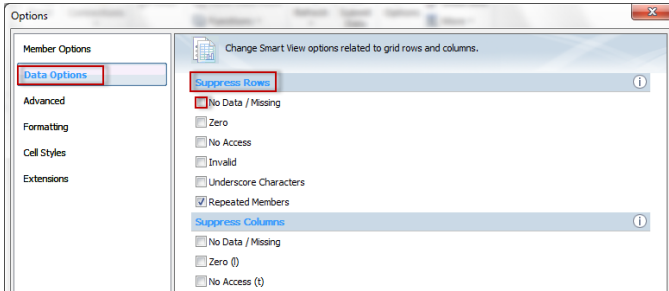
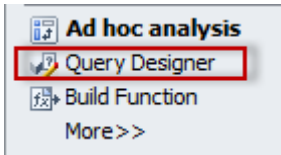
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## Activity 5: Create Ad Hoc Sheet Using Query Designer.

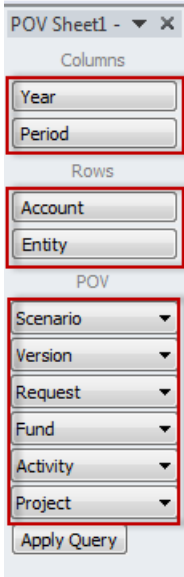
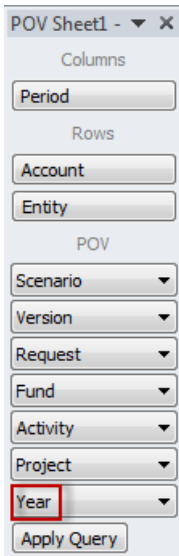
In this activity, you will:

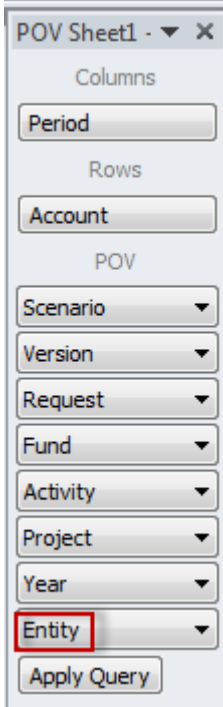
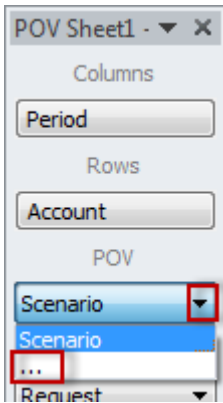
- Open a New Excel Sheet
- Verify you are connected using Private Connection
- Create a new Query Designer Sheet
- Modify the layout of the Dimensions on the Sheet
- Make Point of View Selections
- Execute the Query and View data on the Ad Hoc Sheet.

1.	Open <b>Microsoft Excel</b> and click <b>File &gt; New &gt; Blank Document</b> .	
2.	Click Smart <b>View &gt; Panel</b> . 	
3.	Click the <b>Private Connections</b> hyperlink. 	
4.	From the <b>Private Connection</b> screen, click the <b>down-arrow</b> icon. 	

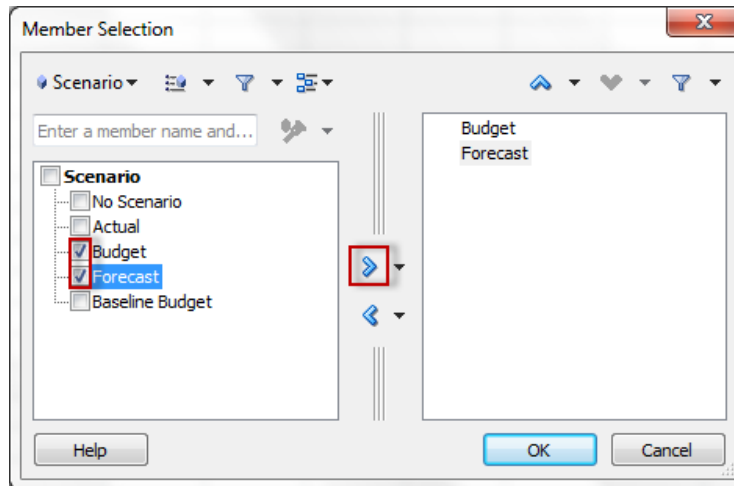
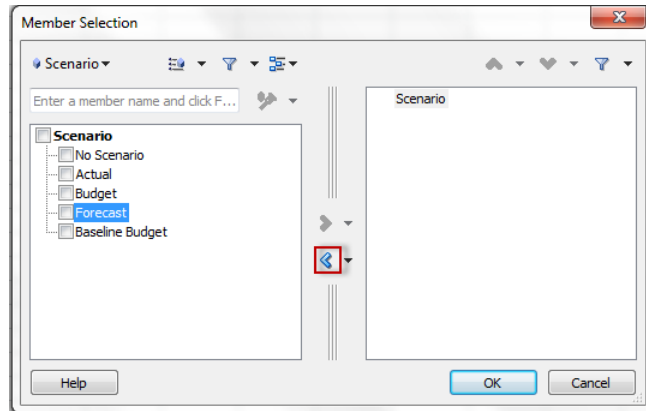
Step	Action	Notes
5.	<p>Click <b>All Named Connections &gt; OpPlan Connection.</b></p> 	
6.	<p>Click <b>Smart View &gt; Options.</b></p> 	
7.	<p>Click <b>Data Options.</b> In the <b>Suppress Rows</b> section, be sure <b>No Data / Missing</b> is unchecked.</p> 	
8.	<p>Located at the bottom of the screen, click <b>Query Designer.</b></p> 	

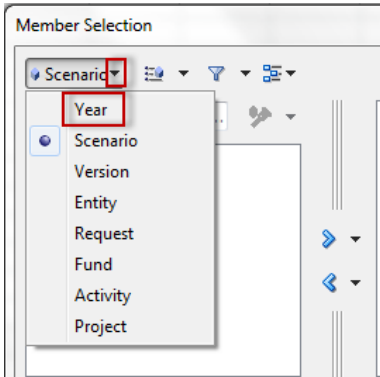
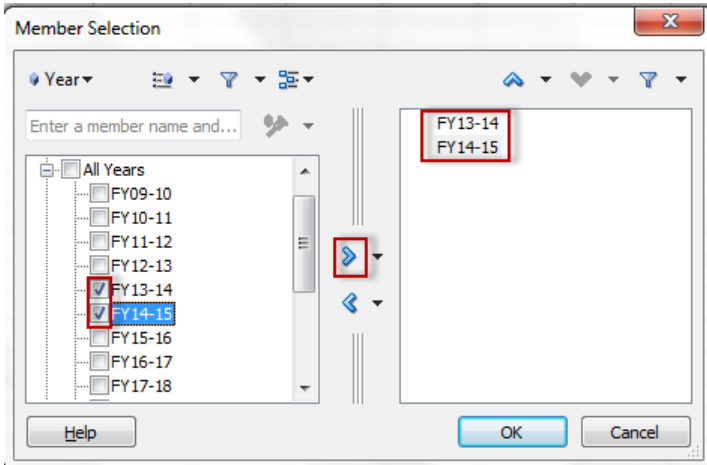


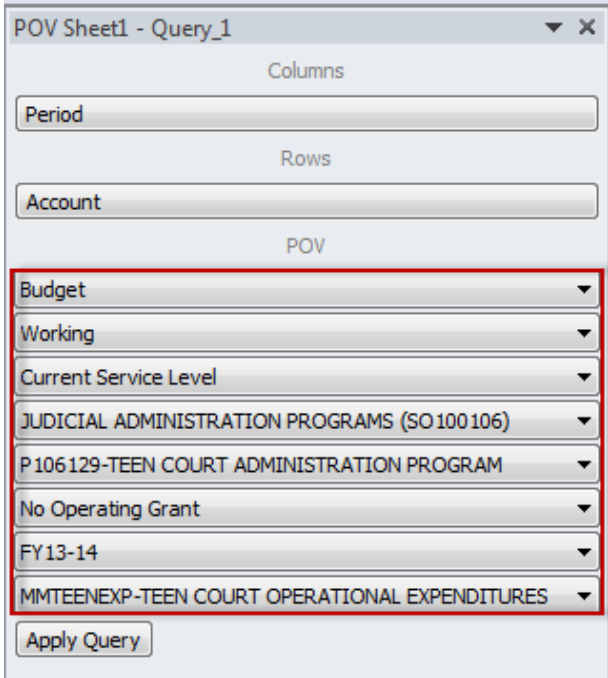
Step	Action	Notes
9.	<p>The <b>Query Designer Dimension Tiles</b> display next to the <b>Connection Panel</b>.</p>  <p>The screenshot shows the 'POV Sheet1' window with three sections: 'Columns', 'Rows', and 'POV'. In the 'Columns' section, 'Year' and 'Period' are listed. In the 'Rows' section, 'Account' and 'Entity' are listed. In the 'POV' section, there are dropdown menus for 'Scenario', 'Version', 'Request', 'Fund', 'Activity', and 'Project'. An 'Apply Query' button is at the bottom.</p>	<p>A separate section for <b>Columns, Rows</b> and <b>POV (Point of View)</b> displays.</p>
10.	<p>Click and drag the <b>Year</b> dimension from the <b>Columns</b> section to the <b>POV</b> section.</p>  <p>The screenshot shows the same 'POV Sheet1' window. In this step, the 'Year' dimension has been moved from the 'Columns' section to the 'POV' section, appearing as a dropdown menu below 'Project'. The 'Period' dimension remains in the 'Columns' section. The 'Apply Query' button is still at the bottom.</p>	<p>Use your left-mouse button to move the dimension tiles between Column, Row and POV...</p>

Step	Action	Notes
11.	<p>Click and drag the <b>Entity</b> dimension from the <b>Rows</b> section to the <b>POV</b> section.</p>  <p>The screenshot shows the 'POV Sheet1' window. It has three sections: 'Columns' with 'Period', 'Rows' with 'Account', and 'POV' with a list of dimensions: Scenario, Version, Request, Fund, Activity, Project, Year, and Entity. The 'Entity' dimension is highlighted with a red rectangular box. Below the list is an 'Apply Query' button.</p>	
12.	<p>Click the drop-down arrow next to the <b>Scenario</b> dimension and click the ellipsis (...).</p>  <p>The screenshot shows the 'POV Sheet1' window. The 'Scenario' dimension is selected in the 'POV' section. A red box highlights the drop-down arrow to the right of 'Scenario'. Another red box highlights the ellipsis (...) option in the expanded list below 'Scenario'.</p>	

Step	Action	Notes
13.	Click the <b>left arrow</b> to remove the current selection.	
14.	Check the boxes next to <b>Budget</b> and <b>Forecast</b> and click the <b>right arrow</b> to add the members to the selection panel.	



Step	Action	Notes
15.	<p>From the dimension drop-down arrow, click <b>Year</b>.</p> 	
16.	<p>Remove <b>Year</b> from the selection pane and move <b>FY13-14</b> and <b>FY14-15</b> to the selection pane.</p> 	

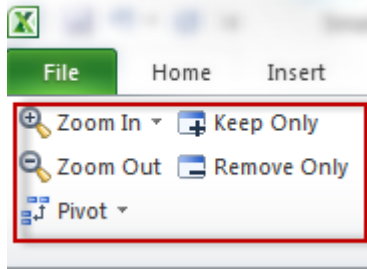
Step	Action	Notes
17.	<p>Continue setting the POV as follows:</p> <ul style="list-style-type: none"> <li>• Version = <b>Working</b></li> <li>• Entity = <b>Your Department Index Code</b></li> <li>• Request = <b>Current Service Level</b></li> <li>• Fund = <b>Fund Associated with Entity</b></li> <li>• Activity = <b>Activity Associated with Entity</b></li> <li>• Project = <b>Grant Associated with Entity</b></li> </ul> 	

18. Click **Apply Query**.

19. The **Query** is now converted to an **Ad Hoc** sheet.

	A	B	C	D	E	F	G	H
1		Period						
2	Account	--						
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

20. Use the standard Ad Hoc features change the display of the row and column dimensions.



21. Configure the **Ad Hoc Sheet** to display similar to the following screenshot.

	A	B	C	D	E	F	G	H
		BegBalance	YearTotal					
1				Q1	Q2	Q3	Q4	
2	All GL Accounts	--	--	--	--	--	--	
3	Fund Balance (AV)	--	--	--	--	--	--	
4	Fund Balance (FAMIS)	--	-1514831	-310546	-237007	-481872	-485406	
5	REVENUES	--	--	--	--	--	--	
6	EXPENDITURES	--	1514831	310546	237007	481872	485406	
7	PERSONNEL SERVICES (01)	--	894227	229628	218016	221524	225059	
8	COURT COSTS (10)	--	--	--	--	--	--	
9	CONTRACTUAL PROFESSIONAL SERVICES (21)	--	--	--	--	--	--	
10	OTHER CONTRACTUAL SERVICES (22)	--	22939	6613	4583	5872	5872	
11	INSURANCE (23)	--	--	--	--	--	--	
12	MAINTENANCE & REPAIRS (24)	--	1675	--	670	503	503	
13	RENTAL & LEASES (25)	--	13225	350	1400	5738	5738	
14	CHARGES FOR COUNTY SERVICES (26)	--	25207	4337	11392	4739	4739	
15	TAX COLLECTOR DISTRIBUTIONS (29)	--	--	--	--	--	--	
16	GENERAL & ADMINISTRATIVE EXPENSES (30)	--	7487	1183	327	2989	2989	
17	COMMODITIES (40)	--	3030	501	620	954	954	
18	SPECIALIZED AGENCY CHARGES (60)	--	408291	67933	--	170179	170179	
19	DEBT PAYMENTS (70)	--	--	--	--	--	--	
20	DEPRECIATION, AMORTIZATION AND DEPLETION (80)	--	--	--	--	--	--	
21	LAND AND LAND IMPROVEMENTS (91)	--	--	--	--	--	--	
22	BUILDING & BUILDING IMPROVEMENTS (92)	--	--	--	--	--	--	
23	IMPROVEMENTS OTHER THAN BUILDINGS (93)	--	--	--	--	--	--	
24	COST OF GENERAL CONSTRUCTION (94)	--	--	--	--	--	--	
25	MACHINERY, EQUIP, FURNITURE, AUTO, OTHER (95)	--	--	--	--	--	--	
26	INFRASTRUCTURE (99)	--	--	--	--	--	--	
27	INTERFD TRSF-OUT	--	--	--	--	--	--	
28	INTRAFD TRSF-OUT	--	--	--	--	--	--	
29	Fund Balance (HD)	--	--	--	--	--	--	
30	All Accounts (WS)	--	--	--	--	--	--	
31								

--END--





## Activity 6: Ad Hoc Analysis Case Study.

In this activity, you will:

- Create the Smart View Sheet displayed below using Query Designer and Ad Hoc functions.
- In the Rows: **Accounts**
- In the columns: **Year, Scenario and Period**
- All other dimensions in the Point of View box (use appropriate information from your department: Entity, Fund, Project, Grant)
- Expand the rows and columns to display appropriate data
- Use Smart View Options to suppress missing data rows on the sheet
- Save the sheet on your desktop – **Case Study.xlsx**

	A	B	C	D	E	F	G	H	I	J	K	L
1		FY13-14				FY14-15						
2		Budget		Forecast		Budget		Forecast				
3		BegBalance	YearTotal	BegBalance	YearTotal	BegBalance	YearTotal	BegBalance	YearTotal			
4	Fund Balance (FAMIS)	--	--	--	-1514831	-1563554	-1003997	--	--			
5	EXPENDITURES	--	--	--	1514831	1563554	1003997	--	--			
6	PERSONNEL SERVICES (01)	--	--	--	894227	1003997	1003997	--	--			
7	OTHER CONTRACTUAL SERVICES (22)	--	--	--	22939	15600	--	--	--			
8	MAINTENANCE & REPAIRS (24)	--	--	--	1675	2000	--	--	--			
9	RENTAL & LEASES (25)	--	--	--	13225	15650	--	--	--			
10	CHARGES FOR COUNTY SERVICES (26)	--	--	--	25207	19289	--	--	--			
11	GSA CHARGES (260)	--	--	--	25207	19289	--	--	--			
12	GENERAL & ADMINISTRATIVE EXPENSES (30)	--	--	--	7487	9370	--	--	--			
13	TRAVEL (312)	--	--	--	1597	1570	--	--	--			
14	ADVERTISING (314)	--	--	--	5250	7000	--	--	--			
15	PRINTING & GRAPHICS (315)	--	--	--	413	550	--	--	--			
16	MAILING SERVICES (316)	--	--	--	188	250	--	--	--			
17	MISCELLANEOUS (330)	--	--	--	41	--	--	--	--			
18	COMMODITIES (40)	--	--	--	3030	2200	--	--	--			
19	SPECIALIZED AGENCY CHARGES (60)	--	--	--	408291	345448	--	--	--			
20	SPECIAL TRANSPORTATION (602)	--	--	--	6728	6000	--	--	--			
21	GRANTS TO OUTSIDE ORGANIZATIONS (606)	--	--	--	401563	339448	--	--	--			
22	INTERFD TRSF-OUT	--	--	--	138750	150000	--	--	--			
23												

POV [Book4]Sheet1\_1

Working

Current Service Level

JUDICIAL ADMINISTRATION PROGRAMS (SO100106)

P106129-TEEN COURT ADMINISTRATION PROGRAM

No Operating Grant

MMTEENEXP-TEEN COURT OPERATIONAL EXPENDITURES

Refresh

--END--



## Appendix A: Hyperion Smart View Options

MS Office (Excel) Smart View has a set of options that operate as preferences. These options affect the view of data forms ad hoc sheets and reports. These options do not affect other users' view of the report or their data. The options are divided into several windows:

Member Options

Data Options

Advanced

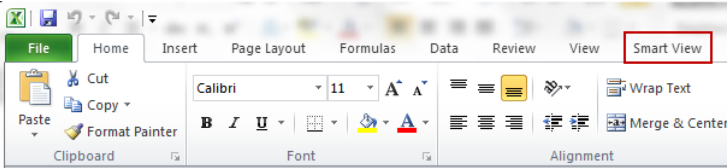
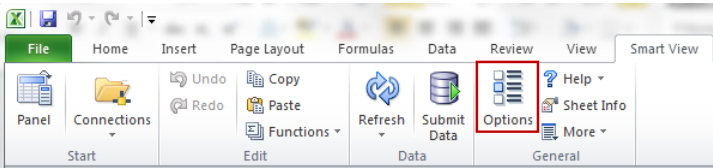
Formatting

Cell Styles

Extensions

In this section of the activity, you will:

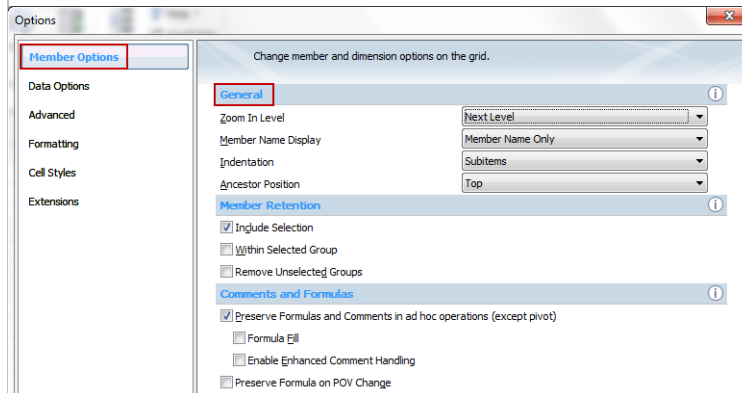
- Access Hyperion Smart View and set Options

Step	Action	Notes
1.	<p>Launch <b>Microsoft Office Excel</b> and navigate to the <b>Smart View</b> menu option.</p> 	
2.	<p>From the Smart View ribbon, click the <b>Options</b> icon. .</p> 	

3. The **Options** dialog box opens, with the **Member Options** panel displayed. The named links on the left open the option panels in the dialog box

The **Members Options** link provides generic preferences for Smart View.

#### **Member Options > General:**



#### **General Options:**

**Zoom In Level:** allows you to set the dimension level that displays when you zoom in on a dimension.

**Member Name Display:** controls the appearance of dimension member name and description in queries.

**Indentation:** controls how children dimensions are indented in Excel.

**Ancestor Position:** determines the order in which parent and children dimensions appear in Excel.

#### **Mode:**

**Use Double Click for Operations:** When enabled, this allows you to double-click to expand parent dimension members in query results.

4.

## Member Options > Member Retention:

### Member Retention:

This option affects the display of members that are drilled on (either up or down). If no option is selected, Smart View removes the item drilled on and displays only the children or descendants. The following options are available:

**Include Selection:** keeps the member when you drill-down. For example, if you drill from YearTotal to quarters and this option is selected, the YearTotal member will be retained as part of the report.

### Within Selected Group:

keeps the member at the same indentation as the resulting member.

### Remove Unselected

**Groups:** drills to the next level on the item selected and remove all other items for the row or column. For example, if your report had quarters on the columns and you drill on Q1 with this option selected, the result would be Oct, Nov, and Dec. All other quarters would be removed from the report.

5.

**Data Options** allow you to set row suppression controls and replacement value controls for data grids.

## Suppress Rows and Suppress Columns:

The items control how no data and missing values display in Smart View sheets. Each setting will control either row or column data

**NOTE:** If you attempt a new query and click **Refresh**, you may receive an error message if the **#No Data / Missing** and the **Zero** options are selected.

The options available for row and column information include:

### No Data / Missing:

suppresses rows or columns that contain no data.

**Zero:** suppresses any rows of columns where the value is 0.

**No Access:** user does not have access to selected members

**Invalid:** intersection is not valid

**Underscore Characters:** if these members are used in Planning, suppress them on the sheet

**Repeated Members:** hides repeated labels in the rows or columns.  
For example, if you were looking at 10 accounts for each Entity (Index Code), rather than seeing the Entity display next to each account, it would only appear for the first account – when this option is selected.

6.

## Replacement:

Options

Member Options

**Data Options**

Advanced

Formatting

Cell Styles

Extensions

Change Smart View options related to grid rows and columns.

**Suppress Rows**

☐ No Data / Missing

☐ Zero

☐ No Access

☐ Invalid

☐ Underscore Characters

☒ Repeated Members

**Suppress Columns**

☐ No Data / Missing

☐ Zero (t)

☐ No Access (t)

**Replacement**

#NoData/Missing Label: --

#NoAccess Label: #No Access

#Invalid/Meaningless: #Invalid

☐ Submit zero

☐ Display Invalid Data

☒ Enable Essbase Format String

**Mode**

Cell Display: Data

☐ Navigate Without Data

☐ Suppress Missing blocks

The options in this section allow you to enter what you want to see for **#Missing**, Zero, and Errors (usually generated from a formula). Whatever is entered gets saved or displayed as text. This can be a hindrance to formatting and formulas.

**#Missing** is the default setting for **#NoData/Missing Label**. You may replace this value with – or a value of **0**. The display of any value in this field is displayed as text on the Smart View sheet.

7.

## Mode:

Options

Member Options

**Data Options**

Advanced

Formatting

Cell Styles

Extensions

Change Smart View options related to grid rows and columns.

**Suppress Rows**

☐ No Data / Missing

☐ Zero

☐ No Access

☐ Invalid

☐ Underscore Characters

☒ Repeated Members

**Suppress Columns**

☐ No Data / Missing

☐ Zero (t)

☐ No Access (t)

**Replacement**

#NoData/Missing Label: --

#NoAccess Label: #No Access

#Invalid/Meaningless: #Invalid

☐ Submit zero

☐ Display Invalid Data

☒ Enable Essbase Format String

**Mode**

Cell Display: Data

☐ Navigate Without Data

☐ Suppress Missing blocks

**Cell Display:** allows you to select **Data** or **Calculation Status** to appear in queries.

### Navigate Without data:

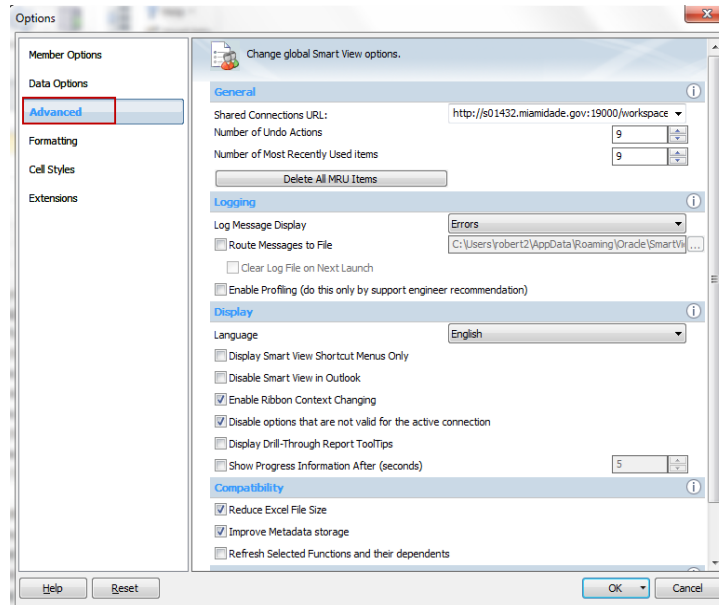
Navigating for your data can be a tedious process involving a lot of drilling up and down the hierarchies. This can be time consuming as data is retrieved every time you drill on a member. The **Navigate Without data** option allows you to quickly retrieve members you want without waiting for data to be returned from the database. Once you have the required metadata selected, return to this window and deselect this selection.

### Suppress Missing Blocks:

Use this option to hide Essbase blocks that contain **#missing**.

8.

## Advanced:



### Shared Connections URL:

This option allows you to establish a connection to a shared server, which maintains all Hyperion connections for that server.

**Log Message Display:** This option affects how error messages are logged in the log file by the server. This does not affect their display because warnings and errors are always displayed.

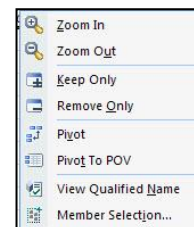
You can also choose to put the error messages in a local file so you can view them and clear the local file each time you open Smart View.

**Others:** There are several additional items listed here that can affect performance and the display of your window:

### Display Smart View

#### Shortcut Menus Only:

controls the right-click menu on a member. If this is selected, you are presented with a menu specific to Smart View rather than the normal Excel right-click options:



#### Reduce Excel File Size:

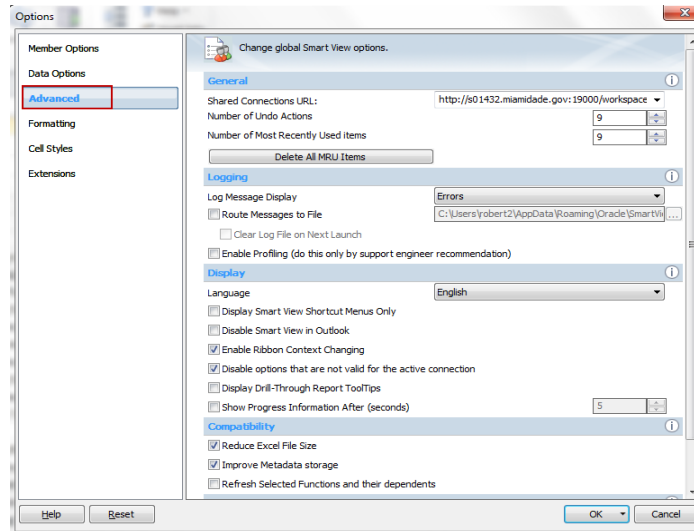
This option is selected by default and helps manage the file size created when retrieving and storing large volumes of data.

#### Improved Metadata

**Storage:** If you want to copy all the metadata



## Advanced – Continued:



settings from one worksheet to another including Smart View custom properties, or metadata, associated with the original sheet, such as connection information, POV selections, and alias tables, you can do this if this option is selected. This allows you to quickly replicate an existing worksheet in a new workbook with all settings intact. This is selected by default. This option works in conjunction with the **Import Metadata** Option under the **Planning Ad Hoc** menu.

### Disable Smart View

**Microsoft Outlook:** Smart View often has trouble with Microsoft Outlook. If you know that you will not be using Microsoft Outlook with Smart View, click this option to work more productively.

### Enable Ribbon Context

**Changing:** This option is useful if you have multiple Hyperion products. If this option is selected, the menu options under Smart View will be focused on those features that pertain to the current worksheet connection.

9.

## Formatting:

Options

Member Options  
Data Options  
Advanced  
**Formatting**  
Cell Styles  
Extensions

Change grid formatting, styling and coloring options.

**Formatting**

☐ Use Thousands Separator  
☐ Use Cell Styles  
☒ Use Excel Formatting  
☐ Move Formatting on Operations  
☐ Retain Numeric Formatting  
☒ Adjust Column width

Scale: Default  
Preview:   
Decimal Places: Default  
Preview:

**Number Formatting:** The number formatting options affect the way formatting of the data values render when you click **Refresh**.

**Use Thousands Separator:** inserts commas or other characters into large numbers to identify thousands.

**Use Cell Styles:** Sheet inherits the settings from the Use Cell Styles screen.

**Use Excel formatting:** Enables the use of Excel standards for \$, etc. as defined for the current worksheet.

**Retain Numeric Formatting:** retains the number formatting in query results.

**Scale:** Allows you to alter the appearance of numbers by scaling up or down, which is useful when dealing with large numbers.

10.

### Cell Styles:

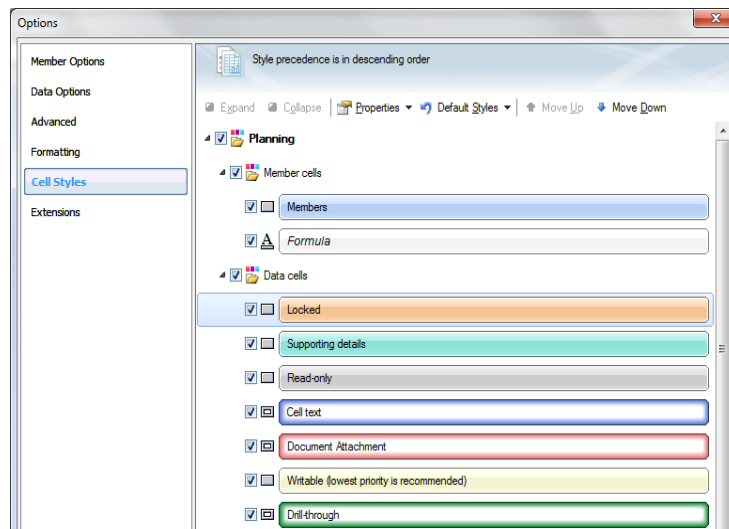
Cell style options are global options, which apply to the entire current workbook and to any workbook and worksheet that are created henceforth. On the Cell Styles page, you can specify formatting to indicate certain types of member and data cells.

You can specify a style to indicate the type of member and data cells. Because cells may belong to more than one type — a member cell can be both parent and child, for example — you can also set the order of precedence for how cell styles are applied.

**Member Cell:** Applies formatting to Members and Formulas

**Data Cell:** Applies formatting to the following conditions:

- Locked
- Supporting Detail
- Read Only
- Cell Text
- Document Attachments
- Writable
- Drill-through



11	<p><b>Extensions:</b></p> <p>Extension options are global options, which apply to the entire current workbook and to any workbook and worksheets that are created henceforth.</p> <p>The Extensions page contains a list of the extensions that are installed to leverage Smart View functionality for other Oracle products. From this page you can do the following:</p> <ul style="list-style-type: none"><li>• Enable and Disable extensions.</li><li>• Check for updates to extensions.</li><li>• Enable logging for extension installations.</li></ul>	
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**--END--**