

Quick Start to Smart View

General Tips:

- Take your time.
- The Point of View (POV) is a drop-down box at the top of the page where you select a segment value
 - Imagine the POV as book table of contents that lets you jump to a specific page of data

The Smart View Screen:

Tools

Smartview for Report UAT tests.xlsx - Excel

File Home Insert Page Layout Formulas Data Review View Developer **Smart View** Essbase Tell me what you want to do

Panel Connections Undo Paste Redo Functions Refresh Submit Data Options Sheet Info More

Start Edit Data General

Smart View has add-in specific ribbons to access the various Smart View tools

Rows of data

	B	C	D	E	F	G	H	I
2	Program	Fund	Location	All Departments	Class	Project	Legacy Chart	FY18
3	Original Budget							
4	BegBalance							
5	A442110	838,000.00						
6	A442116	7,000.00						
7	A452219	474,000.00						
8	A452220	210,000.00						
9	A452522	1,510,000.00						

Columns of data

The POV is the top row of the worksheet or in a POV box

Smartview for Report UAT tests.xlsx - Excel

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Start Edit Data General

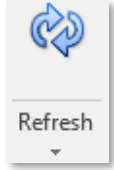
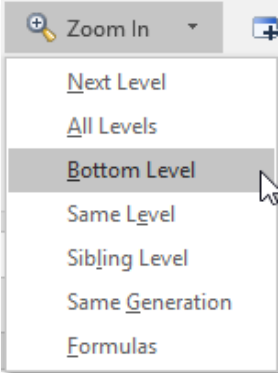
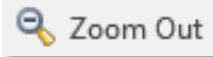
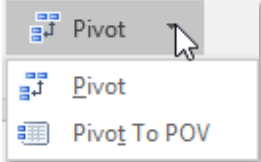


POV [Smartview for Report UAT tests.xlsx]JOB Account_1

Program Fund Location All Departments Class Project Legacy Chart FY18 Refresh

A4 A442110

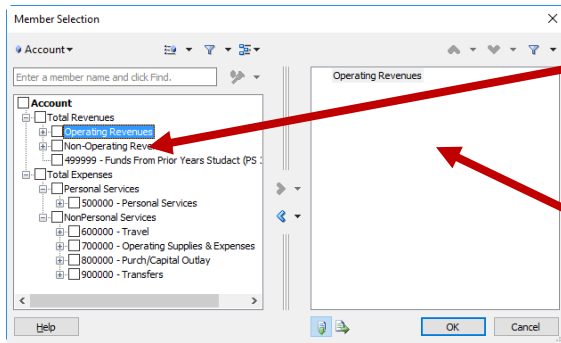
	A	B	C	D	E	F	G
2		Original Budget					
3		BegBalance					
4	A442110	838,000.00					
5	A442116	7,000.00					

Smart View Menu Options

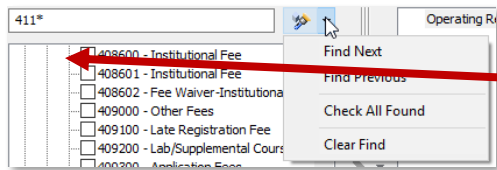
	<p>Refresh: Used to pull data from the database into Excel. As you make changes to your spreadsheet pull it is important to remember to refresh your data.</p>
	<p>Zoom In: Allows you to drill into a more granular level of data. Use the drop down arrow next to the “Zoom In” button to choose which level you want to look at. The most common level will be “Bottom Level”</p>
	<p>Zoom Out: Does the opposite of “Zoom In”, it moves up the hierarchy one level.</p>
	<p>Pivot: Pivots the dimension from POV to Rows and then to Columns. Click the dropdown to pivot a row or column dimension back to the POV. To move from a row or column back to the POV, you must use the “Pivot To POV” in the drop down menu</p>
	<p>Keep Only: Keeps only the dimension member selected. You can use the control and shift keys to select multiple members</p>
	<p>Remove Only: Removes only the dimension selected. You can use the control and shift keys to select multiple members</p>

Member Selection

Member Selector: Provides dropdown functionality for any dimension member



- In the member selection dialog box, the members on the left are store in hierarchical order and are the members that are available to be selected.
- The members on the right side of the box are the members that are in the current smart view worksheet.



- You can search for members on the left side of the screen by using the search box. Use a star (“*”) for wildcard matching.

Additional information on Smart View can be found in the OneSource Training Library (<https://training.onesource.uga.edu/>).