

# Smart View Navigation “Cheat Sheet”

## 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 let’s you jump to a specific page of data

## The Smart View Screen:

The screenshot shows the Excel ribbon with the Smart View tab selected. Callouts provide the following information:

- Tools:** A callout points to the 'Tools' dropdown menu in the top left corner.
- Smart View has add-in specific ribbons to access the various Smart View tools:** A callout points to the 'Smart View' and 'Essbase' tabs on the ribbon.
- Rows of data:** A callout points to the data rows in the worksheet, specifically the 'Original Budget' and 'BegBalance' rows.
- Columns of data:** A callout points to the column headers in the worksheet, such as 'Fund', 'Location', 'All Departments', 'Class', 'Project', 'Legacy Chart', and 'FY18'.
- The POV is the top row of the worksheet or in a POV box:** A callout points to the 'POV [Smartview for Report UAT tests.xlsx]JOB Account\_1' section above the worksheet, which contains a row of dropdown menus for selecting filters.

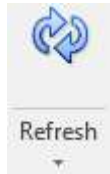
	A	B	C	D	E	F	G	H	I
		Program	Fund	Location	All Departments	Class	Project	Legacy Chart	FY18
		Original Budget							
		BegBalance							
3									
4	A442110	838,000.00							
5	A442116	7,000.00							
6	A452219	474,000.00							
7	A452220	210,000.00							
8	A452522	1,510,000.00							

This screenshot shows the 'POV [Smartview for Report UAT tests.xlsx]JOB Account\_1' section. It features a row of dropdown menus for selecting filters, followed by a 'Refresh' button. Below this, the worksheet grid is visible, showing the same data as the previous screenshot.

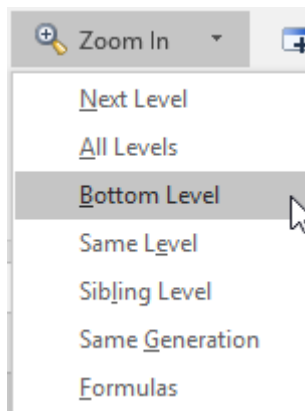
	A	B	C	D	E	F	G
2		Original Budget					
3		BegBalance					
4	A442110	838,000.00					
5	A442116	7,000.00					

## Navigating Smart View:

- 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.



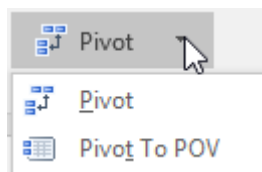
- Zoom In – Allows you to drill into a more granular level of data. Use the drop down arrow next to the “Zoom In” button to choose which level you want to look at. The most common level will be “Bottom Level”



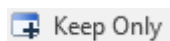
- Zoom Out – Does the opposite of “Zoom In”, it moves up the hierarchy one level.



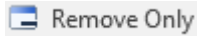
- Pivot - Pivots the dimension from POV to Rows and then to Columns. Click the dropdown to pivot a row or column dimension back to the POV. To move from a row or column back to the POV, you must use the “Pivot To POV” in the drop down menu



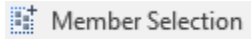
- Keep Only - Keeps only the dimension member selected. You can use the control and shift keys to select multiple members



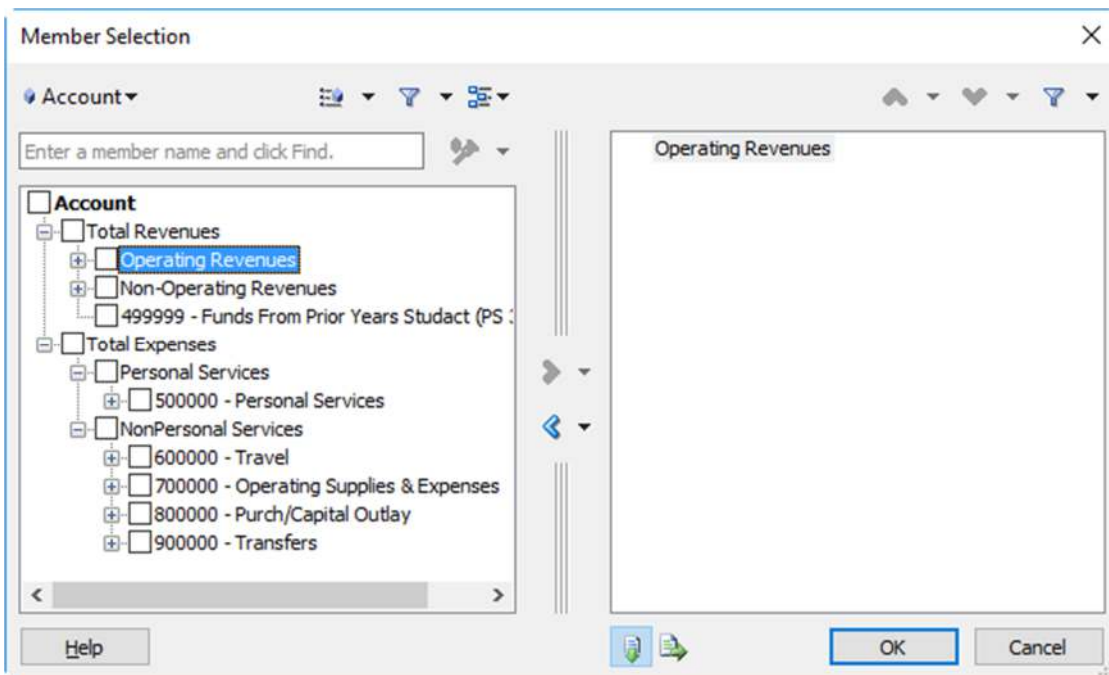
- Remove Only - Removes only the dimension selected. You can use the control and shift keys to select multiple members



- 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.

