OneSource

Using Smart View
UGA Budget Management System

OneSource
UNIVERSITY OF GEORGIA

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Agenda

- Introducing SmartView
- Installing and Setting Up SmartView
- Understanding the Database
- Terminology and Concepts
- UGA Dimensional Models
- Logging Into Smart View
- Creating an Ad Hoc Report
- Symmetric vs Assymetric Reporting
- Hiding and Docking the POV
- Customizing the Quick Access Toolbar
- Using What You Have Learned
- Wrap-Up

Objectives

When you complete this course, you will know how to:
- Setting up Smart View
- Understand basic terminology and functionality
- Log in to Smart View
- Create an Ad-Hoc analysis
- Use Smart View tools
- Work with Smart View grids

*Instructions for installing Smart View are found in the Online Training Library

Introducing Smart View
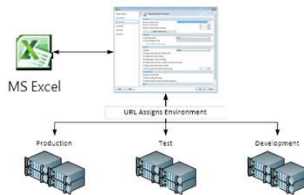
Using Smart View for the UGA Budget Management System

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Overview

- Smart View is based on Microsoft Excel to provide an interface for Oracle Hyperion products
- Users use Smart View to
  - View Data from the UGA Budget Management System
  - Import Data to the UGA Budget Management System
  - Model budget data
  - Report on budget data
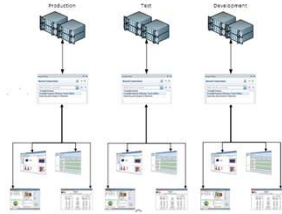- Smart View works with Excel, Word, and PowerPoint

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How Smart View Works

- Connects via a URL that points Excel to different environments

MS Excel

URL Assigns Environment

Production   Test   Development

How Smart View Works

- Uses a Provider Service to talk to an application
- The user selects the application based on security

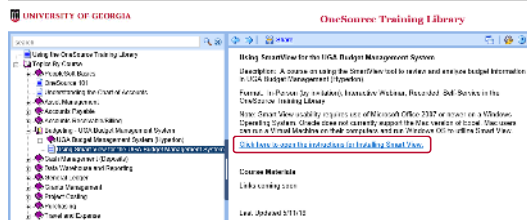## Installing and Setting Up Smart View

Using Smart View for the UGA Budget Management System

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Installing Smart View

- You can find the step-by-step instructions to install Smart View in the OneSource Training Library

Setting Up Smart View

- This will add a new Smart View Ribbon when you open Excel

- Click on the Options tab to set up Smart View

Smart View Shared Connections

- Shared Connections are used to point Smart View to the correct environment URL.
- This will point to the production environment. Enter the production URL on the Options > Advanced page.

Shared Connections

- Choose the Advanced option in the Options dialog box to set up Shared Connections
- Shared connections points Smart View to the production environment for retrieving data
- The production environment URL is:
  https://budgets.onesource.uga.edu/workspace/SmartViewProviders

Understanding the Database

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The Database Layer

- Smart View is used primarily to retrieve data
- It is helpful to understand the database structure to understand how data is retrieved
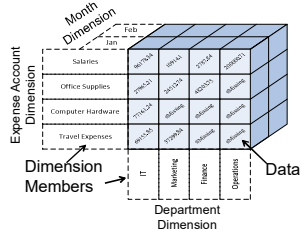- The UGA Budget Management System is based on a multidimensional database

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Relational Database

- A relational database is a collection with data stored in rows and columns
- When new data is added a new row is added at the bottom
- Each time you search for data, the system scans the table starting at the top

Expense Account	Department	Month	Amount
Travel Expenses	IT	Jan	69155.85
Salaries	Marketing	Jan	10914.1
Travel Expenses	Marketing	Jan	37299.84
Salaries	IT	Jan	9617834
Office Supplies	Marketing	Jan	24512.74
Salaries	Finance	Jan	2787.84
Office Supplies	Finance	Jan	4820375
Salaries	Operations	Jan	200000.71
Office Supplies	IT	Jan	27965.21
Travel Expenses	IT	Feb	73810.82
Salaries	Marketing	Feb	58345.88
Salaries	Finance	Feb	61193.23
Office Supplies	Finance	Feb	64093.03
Office Supplies	IT	Feb	97501.17
Salaries	IT	Feb	40906.58
Travel Expenses	Marketing	Feb	87459.36
Salaries	Operations	Feb	200000.71
Computer Hardware	IT	Jan	77161.24

Multidimensional Database

What are my travel expenses in a specific department in a specific month

Dimension Members → Data

- Data is pulled from the relational database in the UGA Financial Management System
- Data is stored in the UGA Budget Management System in a multidimensional database
- Intersections of data dimensions define data storage locations

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Terminology and Concepts

Using Smart View for the UGA Budget Management System

Dimensions

- Dimensions are analogous to PeopleSoft chart fields
- Data is located where the dimensions intersect, the database can easily find and retrieve data
- Examples of Dimensions are:
  - Department
  - Account
  - Year
  - Program
  - Fund
- Dimensions can be thought of as the axis of a report or a question you must answer in Smart View

Dimension Members

- Dimension Members are analogous to PeopleSoft Chart Field Members
- They are the discrete items that make up a dimension.
- Examples of Dimension Members:
  - 20000000 – Terry College of Business
  - 1952000- CSCI Computer Science
  - FY18
  - 10000 – RI-State Appropriations
- A Dimension member can only belong to a single dimension
- Dimension members can exist at various levels of a hierarchy

How Smart View Uses Dimensions and Dimension Members

- Smart View is an Excel interface that allows you to arrange dimensions on various axes of reports
- The axes of the report can be moved around to create the layout the user needs
- Dimension members can be selected to determine exactly what data elements are reported
- Dimension members can be easily changed to create an ad-hoc analysis that unfolds as the user learns more about the data

Rows and Columns

Year and Period are stacked on the columns

	A	B	C	D	E	F
2			FY18	FY18	FY18	FY18
3			BegBalance	YearTotal	YTD	Period
4	All Departments	Operating Revenues	1,143,681,248	570,154,685	1,713,835,933	1,143,681,248
5	All Departments	Non-Operating Revenues	479,786,748	124,311,828	604,098,576	479,786,748
6	All Departments	Total Revenues	1,623,467,996	694,466,513	2,317,934,509	1,623,467,996
7	All Departments	Personal Services	1,047,237,400	128,492,598	1,175,729,998	1,047,237,400
8	All Departments	NonPersonal Services	570,911,945	565,699,675	1,136,611,620	570,911,945
9	All Departments	Total Expenses	1,618,149,345	694,192,273	2,312,341,618	1,618,149,345
10	All Departments	Financial Accounts	5,318,651	274,240	5,592,891	5,318,651
11	All Departments	Account	5,318,651	274,240	5,592,891	5,318,651
12						

Entity and Account are stacked on the rows

- Each grid must have at least one dimension on the rows and one dimension on the column
- You can also stack multiple dimensions

Point of View (POV)

- When you have a grid, the rows and columns represent the X and Y axis
- The Point of View (POV) provides the Z axis that provide the pages of the report
- The POV contains dimensions that don't exist in columns and rows

POV in a Ad Hoc Query

- When used in a Ad Hoc query the POV box that can be "docked" at one edge of the grid or it can "float" in the main worksheet area of Excel.

Example of POV docked at top of screen

Examples of Docked POVs

Example of POV floating in content area

Example of POV docked at right side of screen

Manual POV Line

- Use the first row as the POV line
  - Only when using an Essbase connection

	A	B	C	D	E	F	G	H	I	J	K
1		Program	Fund	Location	Department	Class	Project	Legacy Chart	Scenario	Year	
2		Period									
3	Operating Revenues	#No Access									
4	Non-Operating Revenues	#No Access									
5	Total Revenues	#No Access									
6	Personal Services	#No Access									
7	NonPersonal Services	#No Access									
8	Total Expenses	#No Access									
9	Financial Accounts	#No Access									
10	Account	#No Access									
11											
12											

First row can act as the POV.

Hierarchies

Year
Q1
 Jan
 Feb
 Mar
Q2
 Apr
 May
 Jun
Q3
 Jul
 Aug
 Sep
Q4
 Oct
 Nov
 Dec

Months add up to quarters, quarters add up to years

- Hierarchies organize data into different levels
- The top level is the default when the data is not broken down

Drilling

Expanding the Hierarchy Options
- Double-click
- Ribbon options
- Right Click

	A	B	C
1		All Programs	All Fund Type
2		Total Revenues	
3	YearTotal	1,391,202,958	

	A	B	C	
1		All Programs	All Fund Types	All
2		Total Revenues		
3	Q1	586903525.5		
4	Q2	485047937.4		
5	Q3	319251494.9		
6	Q4	0		
7	YearTotal	1,391,202,958		
8				
9				
10				

An example of drilling into the "YearTotal" value to see the quarterly detail underneath.

A Warning About Drilling

- Drilling is a powerful tool for investigating data and find the details that make up data. However as you drill in it is possible to retrieve thousands or even millions of rows of data
- Retrieving too much data into Excel can cause performance slowdowns
- If you accidentally retrieve too much data restarting Excel or your laptop will usually fix the performance issue.

Hierarchy Terminology

- "Genealogical" or "family tree" language used to describe the positions of dimension members
  - Parent/Child
  - Ancestor/Descendants
  - Siblings
  - Generation
  - Levels
  - Alternate hierarchies
    - If a dimension contains more than one hierarchy, the first value is referred to as the main or base hierarchy
    - Any others are called alternate hierarchies
    - If a member appears in a hierarchy more than once, subsequent appearances are called shared members

Parent/Child

Member Selection

Period
Enter a member name and
Period
BegBalance
YearTotal
Q1
Jul
Aug
Sep
Q2
Oct
Nov
Dec
Q3
Jan
Feb
Mar
Q4
Apr
May
Jun
YTD
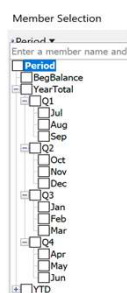
"Jul", "Aug" and "Sep" are all **children** of "Q1".

Likewise, the **parent** of "Q1", "Q2", "Q3" and "Q4" is "YearTotal".

Ancestor/Descendents

- Extending across more than one level in the hierarchy
- Ancestor: All members above a particular member (includes the parent)
- Descendent: all members beneath a particular member (includes the child or children)

Member Selection

The Descendants of "YearTotal" include all the quarters and months.

The Ancestors of "Oct" are "Q2" and "YearTotal"
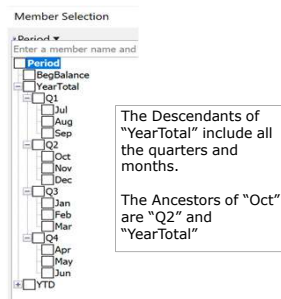
Siblings

- Share the same parent

The siblings of "Apr" are "May" and "Jun"
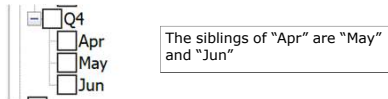
Generation

- A number that represents the distance to the top of the hierarchy.
- The generation number starts with "1"
- A particular member only has one generational number within a hierarchy

Member Selection

Generation 1
Generation 2
Generation 3
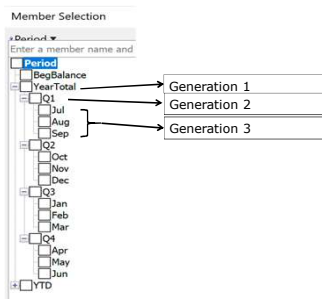
Level

- A number that represents the distance up from the bottom of the hierarchy.
- The generation number starts with "0"
- A particular member only has one generational number within a hierarchy

Member Selection

▲Period ▼
Enter a member name and

- Period
  - BegBalance → Level 2
  - YearTotal → Level 1
    - Q1 → Level 0
      - Jul
      - Aug
      - Sep
    - Q2
      - Oct
      - Nov
      - Dec
    - Q3
      - Jan
      - Feb
      - Mar
    - Q4
      - Apr
      - May
      - Jun
  - YTD

Levels in an Unbalanced Hierarchy

Department
- Institutional Departments
  - All Department
    - 00000000 - All Department
    - 14000000 - SR VP for Acad Aff & Provost
    - 15000000 - Libraries
      - 15100000 - Libraries
      - 15200000 - Libraries Materials
      - 15400000 - The Press
      - 15500000 - Georgia Review
    - 16000000 - EITS (Enterprise IT Services)
    - 17000000 - College of Agric & Environ Sci

In this example, "Libraries" is made up of multiple branches of the family tree, "Libraries", "Libraries Materials", "The Press", etc.

Department
- Institutional Departments
  - All Departments
    - 00000000 - All Department
    - 14000000 - SR VP for Acad Aff & Provost
    - 15000000 - Libraries
      - 15100000 - Libraries
        - 15115000 - Miller Learning Center
          - 15115001 - MLC Budget
          - 15115FMD - MLC Fmd
          - 15115SEC - MLC Security
        - 15121000 - Special Collections Library
        - 15100001 - Libraries Budget
        - 15100ARC - Lib Archival Supplies
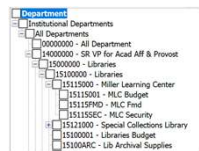
If we start at member "15115001" and walk up the hierarchy using the "Libraries" branch, we would count and say that "All Departments" is at level 5

Levels in an Unbalanced Hierarchy

Department
- Institutional Departments
  - All Departments
    - 00000000 - All Department
    - 14000000 - SR VP for Acad Aff & Provost
    - 42000000 - VP for Instruction
      - 4200000A - VP for Instruction - IU
        - 42013000 - Work Study
        - 42006200 - Freshman College
        - 42005004 - CTL Technology Fee
        - 42004000 - Army ROTC
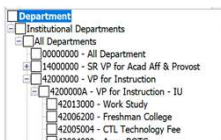
However, if we start at member "42013000" and walk up the hierarchy using the "VP for Instruction" branch, we would count and say that "All Departments" is at level 3.

If you are at Level 0, you are always at the bottom of the hierarchy (also called the "leaf" level)

UGA Dimensional Models

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Cubes Used at UGA

- Report Essbase Application
  - Report Database (11 dimensions)
    - Account
    - Period
    - Program
    - Fund
    - Location
    - Department
    - Class
    - Project
    - Legacy Chart
    - Scenario
    - Year
- UGABUD Planning Application
  - Personal Database (12 dimensions)
    - Account
    - Period
    - Program
    - Fund
    - Location
    - Department
    - Position
    - Class
    - Project
    - Version
    - Scenario
    - Year

Logging In to Smart View

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Log In to Smart View

- Go to the Smart View ribbon in Excel.
- Click on the Panel icon.
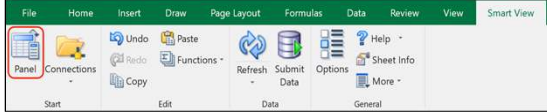
The Smart View Panel Opens

Log In to Smart View
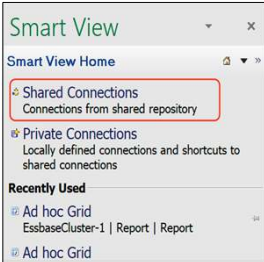
- Click the Shared Connections Option

  A dropdown asks you to select a provider.

Log In to Smart View
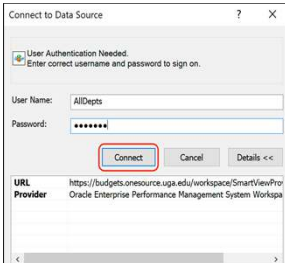
- Enter your MyID credentials to connect to the UGA Budget Management System
- Click the **Connect** button.

Log In to Smart View

Smart View can identify with different types of applications. You will need to select the database you want. This is the Provider.

• Select the appropriate Provider.

Log In to Smart View
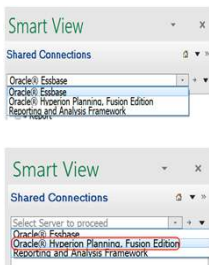
"Oracle Essbase" is the Essbase Provider.
  • Report Application

"Oracle Hyperion Planning, Fusion Edition" is the Planning Provider
  • Personal Application
  • Amendment Application
  • Budgeting Application (future)

Private Connections
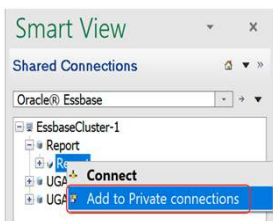
You can create a library of connections that you use frequently.

• As you drill down, you can right-click on the database and select **Add to Private Connections**.
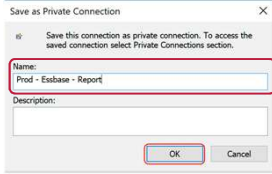
Naming your Private Connection

- A good practice to naming your connection is to provide three pieces of information: the environment name, the provider type, and the database or application name.

Selecting a Private Connection

After you have saved your favorites you can select Private Connections when opening Smart View.

You will then be asked to select a provider
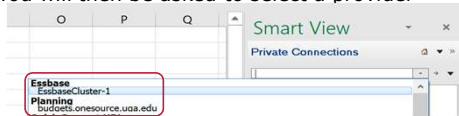
Creating an Ad Hoc Query

Using Smart View for the UGA Budget Management System

Starting your Ad Hoc Query

- Click on the database you want for your query. If you haven't established a connection you will need to login.
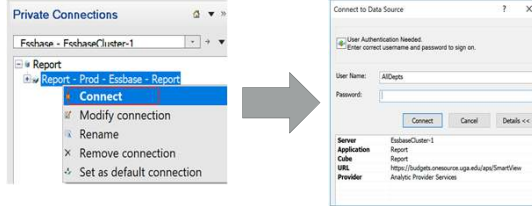
Starting your Ad Hoc Query
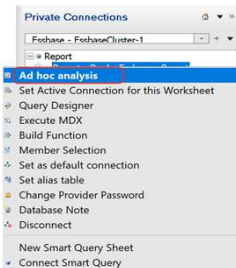
- Right click on the database name or use the menu in the bottom right corner on the Smart View panel to select **Ad hoc analysis**

Starting an Ad Hoc Query

- If you select an application your menu will prompt you to select a database.
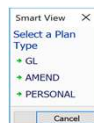
- After you select the database, the ad hoc query grid will open. If there is data from a prior session, you will be asked if you want to clear the contents.

Starting an Ad Hoc Query

• The grid that opens may be different on which provider you select.

Planning Provider Grid

Essbase Provider Grid

Context Sensitive Ribbons

• Different ribbons are displayed for different types of Ad Hoc Queries. Shown below is the Smart View ribbon.
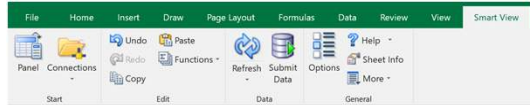
• After connecting a menu specific to the active connection with all necessary commands for a data source displayed on one ribbon.

• Some commands may appear on more than one ribbon.

Other Ribbon Examples

Planning Ribbon

Planning Ad Hoc Ribbon

Essbase Ribbon (Ad Hoc)

Ad Hoc Analysis Tools

- There are several tools that are helpful in ad hoc analysis. Let's explore the following.

- Refresh
- Submit Data
- Member Selector
- Zoom In
  - Next Level
  - All Levels
  - Bottom Level Same Level
  - Sibling Level
  - Same Generation Level
  - Formula

- Retaining Selected Member
- Ancestor Position
- Pivot
  - Planning Pivot
  - Essbase Pivot
  - Dragging and Dropping
- Keep Only
- Remove Only
- Change Alias
- Cascade

Pivot Tool

- The Pivot Tool allows you to switch the axis on which a dimension is reported.
- The default behavior of the pivot tool depends on the type of connection you are using.
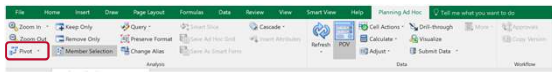
Pivot Tool with Planning Connection

The Pivot tool in a planning connection where you have selected a dimension on the column will pivot to the rows. If you are on a row, it will pivot to the column
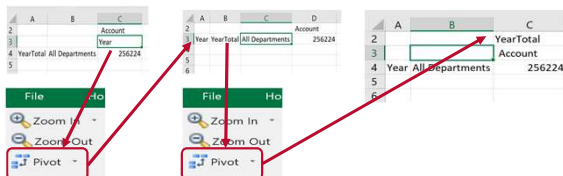
Planning Pivot to POV

- You can use the pivot to POV dropdown to send a row or column dimension to the POV
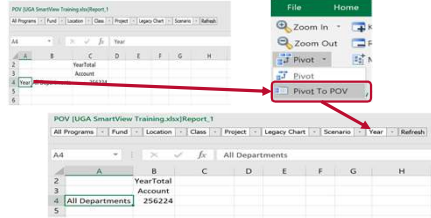
Pivot Tool with Essbase Connection

The Pivot tool in an Essbase connection where you have selected a dimension on the column will pivot to the rows.
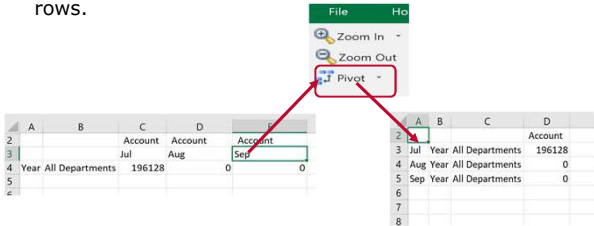
Pivot Tool with Essbase Connection

If you area using the top row of the grid as the POV and Pivot, it will go to the rows.
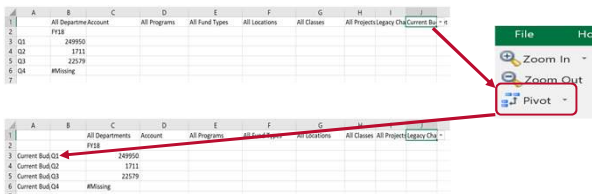
Pivot Tool with Essbase Connection

You must always have at least one dimension on the row and column. If you attempt to pivot with the last dimension on the row or column, you will get the error below:
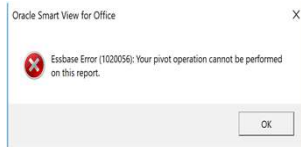
Dragging and Dropping

- You can also change the axis a dimension is on by dragging and dropping.
- For dimensions that are in the rows or columns, right click and hold down to drag and drop.

When released the grid will redraw, pivoting the dropped dimension.

Drag and Drop in Essbase

- You can drag from the grid to the POV.

Drag and Drop from POV to Grid

For both Essbase and Planning connections, you can right or left click on the dropdown button next to the dimension name in the POV to initiate the drag from the POV to a grid.
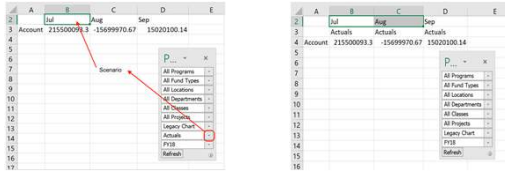
Refresh

- The refresh button lets you take data from the grid you have defined and pull it into Smart View.
- If you don't have a grid open, it will open a new grid.
- If you have a grid open, data will be imported into that and will overwrite any unsaved data you might have.
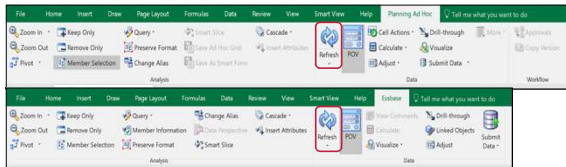
Submit Data

- Submit Data uploads the changes you make to Smart View into the underlying database.
  - You must have write access to the database to do this.
  - Generally, it is better to use planning applications instead of the database to limit this.
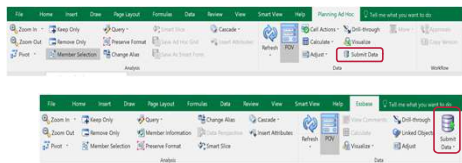
Member Selector

The member selection tool allows you to navigate dimension members using a GUI interface. Selections can be placed on rows and columns

Member Selector

The left half contains all the values available for selection.

Use the checkboxes and arrows to move the values to the right half of the screen.

The right half contains the selected values.
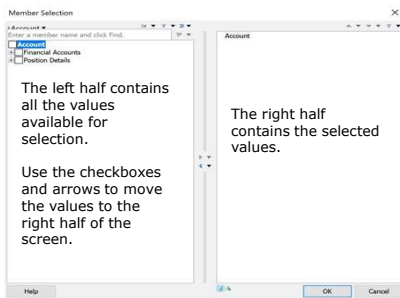
The Member Selector is split into two main areas.

Member Selector

Use the search box at the top of the screen to perform text-based searches of the data. Wildcards are star (*) and question marks (?). The drop-down box to the right of the field controls how the search works.
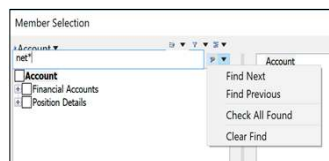
The direction keys at the bottom of the box control whether values are inserted into columns or rows.

Insert on rows

Insert on columns
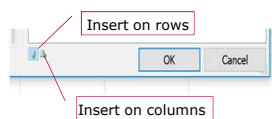
Options Setup

- Use the Options button on the Smart View ribbon to control how data is displayed
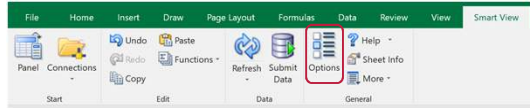
Data Options Set Up

- Choose the Data Options option in the Options dialog box.

Suppression

Smart View has the ability to hide rows and columns of data that are missing. When it does this we say the row or column is "suppressed". This is controlled from the smart view "Data Options" dialog box.
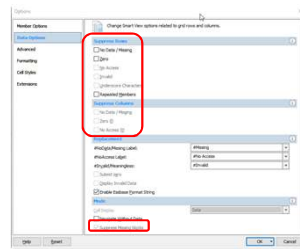
Data Options Set Up

- Choose the Formatting option in the Options dialog box.

Excel Formatting

The easiest way to format data though is to use the normal excel formatting options. To use excel formatting make sure you have the "Use Excel Formatting" and "Move Formatting on Operations" option selected.
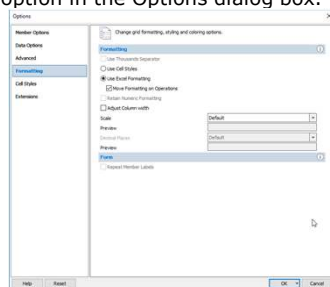
Data Options Set Up

• Choose the Data Options tab in the Options dialog box.

Numeric Zero

Another very useful option is the
ability to define missing data as
"Numeric Zero".
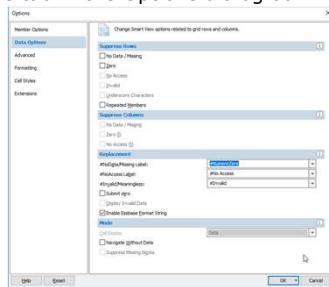
Zoom In

The various Zoom in tools give control over drilling into
and out of data.
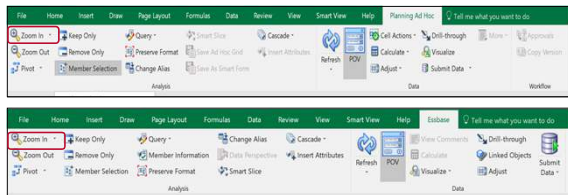
Zoom In Options

There are several options when zooming into data.

• 1 level down
• All levels
• The bottom level of a hierarchy
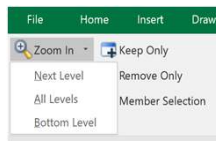
Zoom Behavior

The default behavior is set up on Member Options page of the Smart View options dialog. Select the Zoom In Level option used most often as the default.
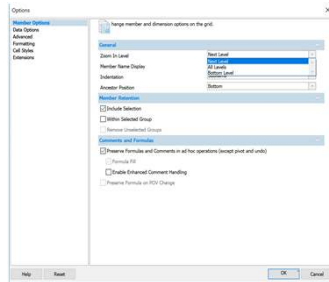
Zoom in Option

If you selected "Use Double-click for Operations" on the Advanced options page, the Zoom In Level action you chose on the Member Options page will be performed when you double-click.
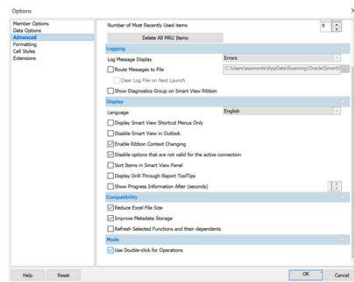
Zoom In Option

No matter what you choose as the default, you can change the type of zoom using the zoom in drop-down list on the right side of the button in the ribbon.

Zooming in is based on a starting point in the hierarchy that is determined by the dimension member currently selected in the grid.

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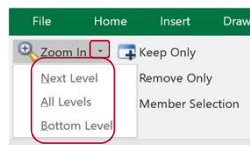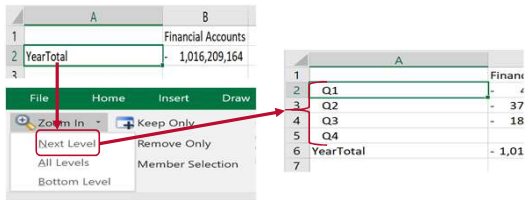
Next Level Zoom

Zooming to the next level opens up the next level down in the hierarchy.
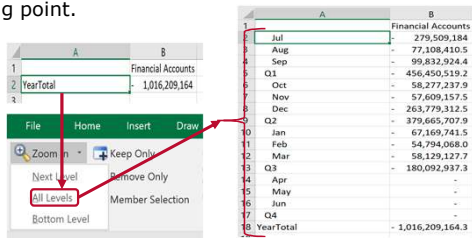
All Levels Zoom

Zooming to all levels will open up all values beneath the starting point.
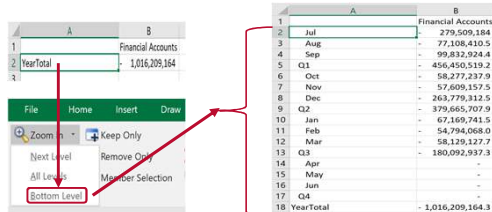
Bottom Level Zoom

Zooming to the bottom level will zoom to the leaf (below zero) level beneath the starting point.

Same Level

Same level zooming will zoom to all values in the same level value. This option is only available in Essbase connections.

Sibling Level

Sibling level zooming will zoom to all values that have the same parent as the source value. This option is only available in Essbase connections.

Retaining Selected Member Options

- On the Member Options page, the "Include Selection" options control whether the initial starting point is retained in the zoom or discarded.

Zoom Retaining Selected Member

Member Retention

☑ Include Selection

	A	B
2		Account
3	YearTotal	256224
4		
5		

File	Home

🔍 Zoom In ▾

Next Level

All Levels

Bottom Level

	A	B
2		Account
3	Q1	196128
4	Q2	12700
5	Q3	48181
6	Q4	-785
7	YearTotal	256224
8		

With member retention turned on, the Year Total stays in the query.

Zoom Without Selected Member

Member Retention

☐ Include Selection

	A	B
2		Account
3	YearTotal	256224
4		
5		

File	Home

🔍 Zoom In ▾

Next Level

All Levels

Bottom Level

	A	B
2		FY18
3	Q1	249950
4	Q2	1711
5	Q3	22579
6	Q4	#Missing
7		

With member retention turned off, the Year Total is not included in the query.

Ancestor Position Options

- When zooming into data, you can control how members in the hierarchy are sorted.
  - Ancestors at the top and descendants at the bottom (how database nerds like things)
  - Descendants at the top and ancestors at the bottom (how accounting nerds like things)

*Only for Planning Connections

Set up on the Member Options page
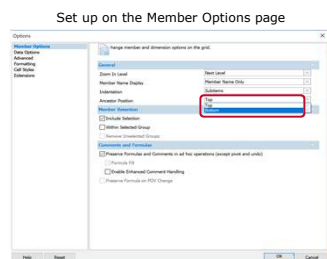
Ancestor Position Examples

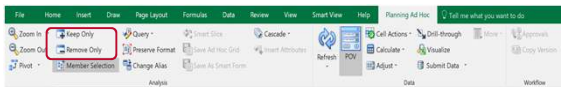Ancestor Position = Bottom   Ancestor Position = Top

Zoom Out

- Zoom Out is the opposite of Zooming In.
- It moves from the selected member one step up the hierarchy.
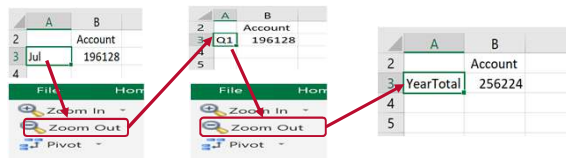
Keep and Remove

The Keep and Remove tools allow you to easily subset the data in your grid.

Keep Only

It is possible to select more than one dimension member (use control or shift keys) when using the Keep or Remove option.

It is keeping the selected members, not the rows or columns. In this example, July & Aug were selected on rows 6 & 7. All occurrences were saved, not just the ones on rows 6 & 7.

Remove Only

The Remove Only option is similar. It removes values from the grid instead of keeping them.

It is keeping the selected members, not the rows or columns. In this example, July & Aug were selected on rows 6 & 7. All occurrences were saved, not just the ones on rows 6 & 7.

Change Alias

The Change Alias button allows you to control the alias table that is displayed in a grid (or if no alias table is used)
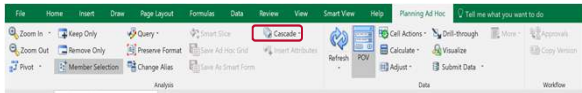
Change Alias

Tip: If you are using a private connection, you can change the default alias table associated with the connection by right clicking on the connection name.
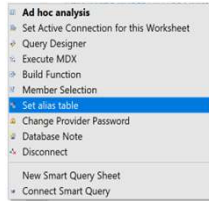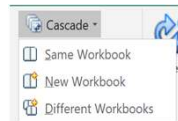

Cascade

Cascade allows you to take any dimension values selected in the POV and expand them out across multiple Excel tabs.


Performing a Cascade Operation

- When performing a cascade operation, it is possible to have the new tabs be in the same workbook, a new workbook or different workbook.
- If you select Different Workbooks, it will open a different workbook for each permutation instead of different tabs.

Using Member Selection

When you open the cascade dialog box, you'll be prompted to choose multiple values for any dimension that exists in the POV. Use the Member Selection tool to select the values you want.
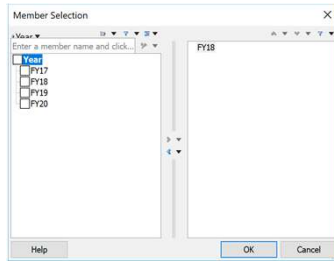
Cascade Results
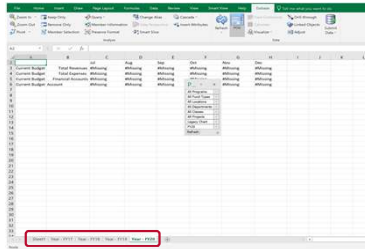
Smart View will create a new tab (or workbook) for each selected value.

Undo/Redo

- The native Undo and Redo functionality in Excel does not work with Smart View.
- There are separate undo and redo functions on the SmartView ribbon.
- These can undo and redo many tasks.
- These cannot undo a data submission in a data form.

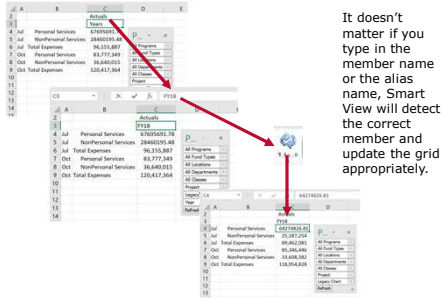The Excel undo and redo buttons will not work with Smart View actions
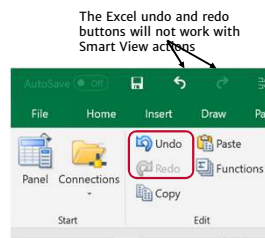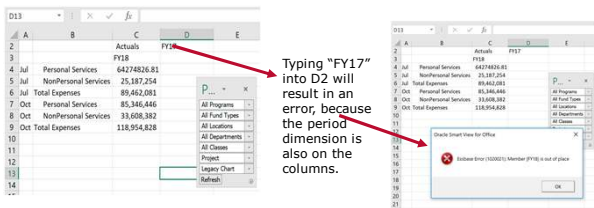
Select Members by Typing

If you know the name of a member, you can simply type it in the correct location in the grid. Then when you press refresh, the grid will update appropriately.

It doesn't matter if you type in the member name or the alias name, Smart View will detect the correct member and update the grid appropriately.

Selecting Members by Typing

You can add new members into an adjacent cell to expand the grid. Be sure that all dimensions for that axis are fully accounted for.
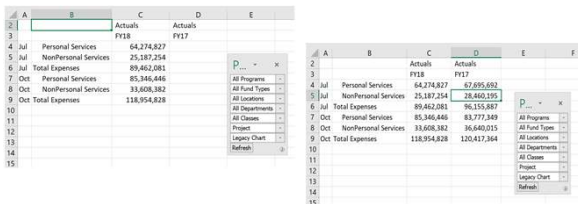

Typing "FY17" into D2 will result in an error, because the period dimension is also on the columns.
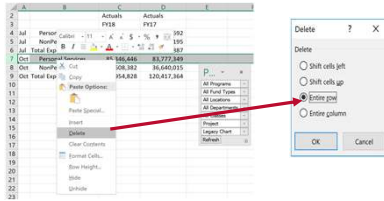
Selecting Members by Typing

In the example below, the number of columns is expanded because all dimensions are accounted for.

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Deleting Rows and Columns

- Use the normal Excel Delete Row or Delete Column functions to re-draw a grid and refresh. This can be an easy way to remove data.

After deleting the row in Excel and refreshing, the grid will continue to function normally.

Symmetric vs Asymmetric Reporting

Using Smart View for the UGA Budget Management System

OneSource
UNIVERSITY OF GEORGIA

website: onesource.uga.edu
email: onesource@uga.edu
service desk: 706-542-0202

Symmetric vs Asymmetric Reporting

- The default behavior for Smart View is for data to expand symmetrically.
- This means that when there is more than one dimension on an axis, any expansion of one dimension will happen for all permutations of the other dimension members on that axis.

Symmetric Example

If you zoom in one level on Q1, the grid grows symmetrically.

	A	B	C
2			Actuals
3	FY18	Jul	25187253.8!
4	FY18	Aug	67767805.8;
5	FY18	Sep	37207244.8!
6	FY18	Q1	130162304.(
7	FY17	Jul	28,460,195
8	FY17	Aug	53205809.2;
9	FY17	Sep	42670613.7!
10	FY17	Q1	124336618.!
11			
12			

Asymmetric Example

- If you only want to see a select combination of dimensions on the rows, you can manually type in values and delete rows to just retain the values you want.
- Not every member of the first dimension would be associated with every member of the second dimension.

	A	B	C
2			Actuals
3	FY18	Jul	25,187,254
4	FY18	Aug	67,767,806
5	FY17	Sep	42,670,614
6			

Hiding and Docking the POV

Using Smart View for the UGA Budget Management System

The Floating POV Box

- Use the POV button to display the floating POV box
- You have the ability to either hide or dock the POV box at any time in a Planning or Essbase query.

The POV button will hide the POV box.

Essbase with Floating POV

Essbase with floating POV

Essbase with 1st Row as POV

You can toggle between having a separate POV box and using the first row of the grid.

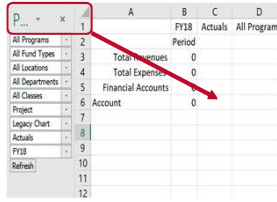You can only use the first row as the POV on an Essbase connection.

Docking the POV

- Grab the top part of the floating POV with your mouse and drag it to one of the edges of the screen.
- You can dock on the top, bottom, left or right side of the screen.

Undocking the Toolbar

- Undocking is the reverse. Grab the top of the docked POV and drag it to the center part of the grid

Customizing the Quick Access Toolbar
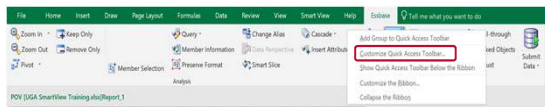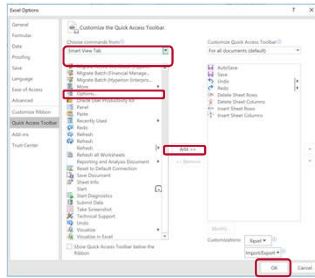
Using Smart View for the UGA Budget Management System

Customizing the Quick Access Toolbar

- Using standard Excel functionality you can customize the Quick Access Toolbar at the top of the Excel screen.
- To start, open the ribbon you want to customize.
- Right-click and select Customize Quick Access Toolbar from the menu that appears.

Customizing the Quick Access Toolbar

- In the Choose commands from field, select the ribbon or All Commands option to find the shortcut you are interested in.
- Select the shortcut to add.
- Click the Add button in the middle.
- When the shortcut is added to the right side, click on OK.

Questions

Department Specific Questions?

Call or email the OneSource Service Desk
onesource@uga.edu
706-542-0202

Using What You Have Learned

Using Smart View for the UGA Budget Management System

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service desk: 706-542-0202

Duplicate This Report in Smart View

- Have a look at the Budgetary Detail Report and recreate the layout using Smart View

Wrap Up

Using Smart View for the UGA Budget Management System

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Summary

During this training, you have learned to:

- Configure Smart View to create ad hoc reports
- Understand basic terminology and functionality
- Log in to Smart View
- Create an Ad-Hoc analysis
- Use Smart View tools

Resources

- OneSource Budgeting Resources page
- OneSource website Resources page
- OneSource Training Library: training.onesource.uga.edu

Contact Us

Project Information
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