Budget Process Tools: Smart View Ad Hoc Basics 1

10.27.16

CalPlan

HCP  (Human Capital Planning)

CalRptg

HCPRptg

Smart View
What is your particular purpose for querying into your CalPlanning data with Smart View?
1. Smart View Defined
2. Map the Smart View Key Ad Hoc Grid Components
3. Setting Options
4. Zooming and Removing Data in the Ad Hoc Grid
5. Smart View Resources
Smart View Ad Hoc Basics 1 Learning Objectives

• **Explain** how and when you can use Smart View and the Oracle Essbase connection
• **Define** the key components of the Ad Hoc Grid
• **Practice** navigating basic Smart View Ad Hoc functionality, including how to
  • Select Dimension Members
  • Maneuver the Point of View
  • Set User Options
  • Locate and manage data display in the grid
  • Refresh and save data
• **Identify** where to go to access Smart View and get support
Smart View Ad Hoc Basics 2 Learning Objectives

• **Review** how and when you can use Smart View and the Essbase connection
• **Discuss** your Smart View Ad Hoc queries
• **Practice** navigating Smart View Ad Hoc functionality including how to
  • Create multiple POVs within a grid
  • Pivot Dimensions
  • Cascade a report across multiple entities
• **Explore** Importing CalPlanning Reports into Smart View
• **Identify** where to go to access Smart View and get support
Smart View Ad Hoc Basics 1 Materials

Classroom Handouts
- Smart View Ad Hoc Basics 1 Slide Presentation
- Smart View Ad Hoc Basics Exercise Guide

On-Line
- Training Evaluation
- Smart View Job Aids and Materials
1. Smart View Defined
2. Map the Smart View Key Ad Hoc Grid Components
3. Setting Options
4. Zooming and Removing Data in the Ad Hoc Grid
5. Smart View Resources
Smart View Defined

**Smart View** is a Microsoft Office add-in for use in Excel, Word, & PowerPoint that provides access to CalPlanning data from

- CalPlan
- CalRptg
- HCPRptg

**Smart View provides:**

- Ad hoc query capability within MS Excel
- Access to live data to develop user specific queries
- Data analysis results stored as Excel documents
- Imports query ready or formatted CalPlan, CalRptg & HCPRptg financial reports into Excel
- Imports financial reports into MS Word or PowerPoint as document image
Flow and Timing In Our Financial Landscape

**BFS/BAIRS**
- BAIRS: Berkeley Administrative Initiative Reporting System
- BFS: Berkeley Financial System

**CALPLANNING**
- **Planning**
  - CalPlan
  - 5xDaily*: Summarized Compensation Plans

**HCM**
- Human Capital Management

**HR**
- Position Management

**PPS**
- Payroll Personnel System

**Nightly**
- Actuals & Encumbrances

**Monthly**
- Summarized Actuals

**5xDaily***
- Operating Budget & Forecast Plan Data
- Detailed Position & Employee Compensation Plans

**5xDaily* 5xDaily**
- Detailed Employee & Position Data

**Flow and Timing In Our Financial Landscape**
- Nightly Actuals
- Monthly Summarized Actuals

* Data pushes every three hours between 9:00am and 9:00pm. Check [http://budget.berkeley.edu/systems/calplanning](http://budget.berkeley.edu/systems/calplanning) for more on the data push schedule and updates to CalPlanning system availability.

* Job Aid: TBD for FY2017-18

* Note: Smart View is highlighted for its importance in the integration of data from various systems.
Smart View via CalPlan vs. CalRptg cube?

**CalPlan Cube**
- Read Only Access available for Planner roles
- Plan values by:
  - Account
  - Fund
  - Chartfield 1
- Subset of Dimensions Available
- Actual data mapped to Plan Only Members

**CalRptg Cube**
- Read Only access for Planners and Reporting Only roles
- Plan values & detailed Actual data *(daily)* by:
  - Account
  - Fund
  - Chart1
- Access to additional Dimensions
  - Time Series- YTD, QTD, MTD, rounding
  - Chartfield 2
  - Program Code
### Available Dimensions in CalPlanning Tools

<table>
<thead>
<tr>
<th>Dimension</th>
<th>CalRptg</th>
<th>CalPlan</th>
<th>HCP</th>
<th>HCPRptg</th>
<th>Smart View</th>
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<tr>
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<td>Program Code</td>
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<tr>
<td>Job Code</td>
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</tr>
</tbody>
</table>

*HCP and HCPRptg only include Compensation related accounts.*
Smart View Connections

3 Smart View Shared Connection:

1. **Essbase**: Creates ad hoc queries from CalPlanning data cubes.

2. **Hyperion Planning**: Open data input forms from CalPlan and HCP. Smart View forms offer same functionality as those in CalPlanning Workspace.

3. **Reporting and Analysis Framework**: Import financial reports from CalPlan, CalRptg and HCPRptg in fully formatted or query ready format for further ad hoc analysis.
Smart View & Essbase Ribbons

Once Smart View is installed on your desktop or accessed via Citrix, MS Office applications will display a Smart View Tab and Ribbon.

Once you login and connect to Smart View an Essbase Tab and Ribbon will display.
Accessing Smart View via CITRIX

CITRIX remote desktop provides an easy way to access Smart View in addition to CalPlanning and avoids any browser compatibility issues.

1. Click the **CITRIX** link on the CalPlanning website: [http://budget.berkeley.edu/systems/calplanning](http://budget.berkeley.edu/systems/calplanning)

2. Download the Citrix receiver (*1st time only*) and login using your CalNet ID & password

3. Select **Smart View**
1. Open **MS Excel**.
2. Go to the **Smart View** ribbon and click the **Panel** icon.
3. From the **Smart View Panel** click on **Shared Connections**. You will be prompted to enter your User Name and Password*.

*User Name and Password are your CalNet ID and Passphrase.*
4. Choose **Oracle® Essbase** in the “Select Server to proceed” dropdown

5. Drill into the **EssbaseCluster-1** to find silo **CalRptg → CalRptg** cube

6. Click on **Ad hoc analysis** at the bottom left-hand corner to connect to the CalRptg cube
Let’s practice Getting Started in Smart View!

Smart View Ad Hoc Basics 1

Exercise 1
1. Smart View Defined
2. Map the Smart View Key Ad Hoc Grid Components
3. Setting Options
4. Zooming and Removing Data in the Ad Hoc Grid
5. Smart View Resources
Smart View Ad Hoc Key Components

After this section, you should be able to:

- Describe the components of a Smart View Ad Hoc grid
- Locate and describe key icons on the Essbase Ribbon
- Toggle your Point of View (POV) from the default to the grid
- Edit dimension members in
  1. Member Selection dialog boxes
  2. POV dialog box
  3. Directly in fields with free form entry
- Create and refresh ad hoc query
- Disconnect from Essbase
Once connected to Essbase, Smart View displays the

- **Essbase** tab and ribbon
- **Default Point of View (POV)** in Row 1 of the sheet
- **Account** dimension in the row display area
- **Period** dimension in the column display area
- **Intersection** of data in cell B3, 853903095.1
Essbase Ribbon - POV

**Clicking** the **POV icon** on the **Essbase ribbon** moves the POV between the default position in Row 1 of the ad hoc grid to a floating POV Box in the ad hoc grid with Row 1 hidden. B3 is the intersection of POV

**Default POV**

![Default POV Image]

**Click POV**

![Click POV Image]

**Floating POV**

![Floating POV Image]
Setting Your POV is KEY!

Smart View offers 4 options to edit your POV:

1. Essbase Ribbon Member Selection
2. Dimension Label Drop Down Member Selection
3. Free Form Entry
4. POV Dialog Box

Each Dimension in the POV defaults to the top level member.
Selecting POV Dimension Members

Option 1: Essbase Ribbon Member Selection

1. Click the **Dimension label** cell in the default POV row.

2. Click **Member Selection** on the Essbase Ribbon.

3. From the **Member Selection** dialog box, select the members from the right-hand section by clicking on the member.

4. Click on the **left-pointing arrow** to remove.

5. **Check** the box next to the member in the **left hand section** that you want to include.

6. Click on the **right-to right-hand pointing arrow** to move it section.

7. Click “**OK**.”
Selecting POV Dimension Members
Option 2: Dimension Label Drop Down Member Selection

1. Click the **Dimension label** cell in the default POV row.

2. Click on the

3. Either type the member name in the text field

4. From the **Member Selection** dialog box, first remove members from the right-hand section by clicking on the member and then clicking on the **left-pointing arrow**.

5. Then check the box next to the **member you want** to include.

6. Click on the **right-to right-hand pointing arrow** to move it section.

7. Click “**OK**.”
Selecting POV Dimension Members
Option 3: Free Form Entry

Member names can also be **typed** directly into the cells.

Type **Total Expenses** into the **Account** cell and click **Refresh**.
Selecting POV Dimension Members
Option 4: Floating POV Box

1. Click on the **POV icon** in the Essbase ribbon to create a floating POV box

2. Click on the **ellipsis “…”** from the Dimension drop-down to select a member

3. The Member Selection window will appear. Move members out of the selection pane on the right by clicking the **left-pointing arrow**.

4. Check the box in front of the member

5. Click the **right-pointing arrow** to move it to the Selection Pane.

6. Click **OK**.
Account Options in Smart View

- **Primary Account Hierarchy** - Allows users to access the CalPlanning Account Hierarchy

- **Alternate Account Hierarchy** - Allows users to access hierarchies created by request for alternate reporting, such as a hierarchy showing Recharge as Revenue

- **Unknown Account Hierarchy** – Not valid for reporting
Refresh - retrieves data from the reporting cube based on POV member selections and updates the appropriate cells in the ad hoc grid.
Setting Your POV

Smart View Ad Hoc Basics
Exercises 2
Smart View Undo  Smart View Redo

Smart View provides **Undo** and **Redo** functionality to revert to and return to previous selections.
Saving Essbase Files in Smart View

**Saving Ad Hoc Queries**

Save your Smart View ad hoc query as an Excel document for future use!

**Sheet Reuse Options**

- Select how you would like to reuse the content on an existing query.
- Once saved, reopen and reconnect to the database to refresh data.

![Excel Save and Save As options](image)

![Smart View Save and Reuse Sheet contents](image)
Recently Used Connections

Once you have made a connection to Smart View, you will be able to connect using the Recently Used connections.

Simply click the Home icon on the connection panel and you will be prompted to enter your User Name and Password to connect. You will bypass the “Shared Connections” process.
Speed POV: Last Year’s Revenue

When creating your Smart View ad hoc query, begin by asking

- **What question(s) am I trying to solve for with this ad hoc analysis?**
- **What POV intersection of will return the data needed to answer?**

a. **What were the total revenues for the College of Natural Resources in FY16 by current funds?**

   *What POV member selections will return your answer?*

*Staying at a high level member will ensure you are capturing all data in that hierarchy.*
b. What is the total revenue so far this year in the College of Natural Resources for current funds?

What POV member selections will return your answer?
c. What are the total revenues and expenses by current funds in the College of Natural Resources so far this year?

*What member selections will return your answer?*
d. What are the forecasted total revenues & transfers and expenses by current funds in the College of Natural Resources this year?

What POV member selections will return your answer?
Speed POV: Forecasted vs Actual Total Expenses & Revenues & Transfers by Like Timeframe

e. What is the College of Natural Resource’s forecasted total expenses, total revenues & transfers to date compared to last year’s Actual to date by current funds?

*What POV member selections will return your answer?*
1. Smart View Defined
2. Map the Smart View Key Ad Hoc Grid Components
3. Setting Options
4. Zooming and Removing Data in the Ad Hoc Grid
5. Smart View Resources
Options or user preferences in Smart View offer flexibility in accessing and displaying query data and are a key component to the power of Essbase.

- The **Options** menu in Smart View allows you to set application preferences.
- Different **Options** are recommended for different connections and queries.
Member Options: Names and Alias

- **Member Name and Alias** - Displays both member name and alias in row dimensions.
- Additional column will be added to show one column with member name and one column with alias.

![Member Options and Grid Example](image-url)
Essbase: Change Alias

- **Alias Table = Default**: Displays alias & member name for all dimensions.
- **Alias Table = None**: Displays member name only for all dimensions.
Member Options – Formulas and Formatting

Preserve Formulas and Comments:
• If unchecked, formulas and comments will be lost on all ad hoc commands.

Formula and Format Fill:
• Propagates formulas and formatting of selected member to zoomed members.
Smart View Options – Data Options

Suppress Rows
• Must be **unchecked** to start an ad hoc query.
• Once a query is started, you can choose to suppress rows that have ‘0’ or missing data.

Replacement
• Determine the method for displaying no data or no access
• Recommended to select **#NumericZero** for no data to allow for Excel calculations
Smart View Options - Formatting

Use Excel Formatting:
• Check to use Excel formulas and formatting options correctly.
• Unchecked, Smart View formatting will override Excel formatting.
• Unchecked, data refreshes or movement of dimension within the ad hoc grid will override Excel formatting.
• Check Move Formatting on Operations to dynamically move Excel formatting when changing the Smart View query.
Saving Smart View Options

Save as Default Options

• Once all options settings are made, select the dropdown arrow next to ‘OK’ and **Save as Default Options**

• **NOTE:** Updating the Suppress Rows option should be unchecked
Error: Remove Suppress Missing and Zero

• If you get this common error when selecting the Ad Hoc Grid, it means that your Smart View Data Options are suppressing “No Data / Missing” and “Zero.”

• To fix, simply click on the Options Box in the Smart View Ribbon and Select “Data Options”. Uncheck the box for Suppress Rows “No Data/ Missing” and “Zero.”

• Click on Ad Hoc Grid and your POV and data intersection will appear.
Setting Smart View Options

Smart View Ad Hoc Basics

Exercise 4
1. Smart View Defined
2. Map the Smart View Key Ad Hoc Grid Components
3. Setting Options
4. Zooming and Removing Data in the Ad Hoc Grid
5. Smart View Resources
Essbase Ribbon Features

- Zoom In
- Zoom Out
- Keep Only
- Remove Only
- Member Selection
- Refresh
Zoom In & Zoom Out

• **Zoom In**: drills down to display lower level members within the selected dimension hierarchy
• **Zoom Out**: drills up to display higher level members within the selected dimension hierarchy
Zoom In Options Defined

**Next Level**
- Retrieve data for the children of the selected members.

**All Levels**
- Retrieve data for all descendants of the selected members.

**Bottom Level**
- Retrieve data for the lowest level of members in the selected dimension.

**Same Level**
- Retrieve data for all members at the same level as the selected member.

**Sibling Level**
- Retrieve data for the siblings of the selected members.

**Same Generation**
- Retrieve data for all members of the same generation as the selected members.

**Formulas**
- Retrieve data for all members referenced in the formula or consolidation of the selected member.
Zoom In Option Settings

- **Zoom In Option Settings**: determines to what level clicking the Zoom icons will go

![Excel spreadsheet with data and Zoom options highlighted]
Keep Only & Remove Only

- **Keep Only**: Allows you to display only specific selected member(s)
- **Remove Only**: Allows you to delete only specific selected member(s)

**Note**: This functionality only works when selecting members from one dimension at a time.
Opening a Saved Smart View Workbook

Smart View Ad Hoc Basics

Exercise 5
Practice

Smart View Ad Hoc Basics

Exercise 6
Build a SRECNA from Scratch!

Smart View Ad Hoc Basics

Homework
1. Smart View Defined
2. Map the Smart View Key Ad Hoc Grid Components
3. Setting Options
4. Zooming and Removing Data in the Ad Hoc Grid
5. Smart View Resources
Budget Process Calendar on bConnected

Follow these steps to display the **Budget Process** calendar within your bConnected calendar

1. From bConnected calendar navigate to the left frame
2. In the **Other calendars** field type **Budget_Process** to locate “Budget_Process Departmental” <budget_process@berkeley.edu>
3. Click on **Budget_Process Departmental** link display the calendar in your list of **Other calendars**
4. Select the **Budget Process Calendar** when you would like to review upcoming Budget related events relevant to CalPlanning Community Members within your calenda
Check out the CalPlanning website for up to date info on:

- Browser and Citrix Links to the CalPlanning Workspace
- **Training, reference materials and local unit support**
- Latest news and system updates
- Monthly Actuals **Upload Schedule**
- Help Desk Information

http://budget.berkeley.edu/systems/calplanning
CalPlanning Availability & Data Push Schedule

CalPlanning Availability

- **Available:** Monday – Friday, 8am-5pm with technical support, except University holidays
- **Available:** Monday – Friday, 7am-8am, 5pm-3am, and weekends but without technical support
- **Unavailable:** 3am-7am daily

CalPlanning Data Push Schedule

CalPlanning plan data is pushed from
- HCP to both CalPlan and HCPRptg
- CalPlan to CalRptg
5 times daily in the first 15 minutes of the hour starting at 9:00am and then every three hours until 9:00pm.

**Do not run** CalPlanning reports (CalPlan, CalRptg, HCPRptg and Smart View) for the first **15 minutes** of the push hours to avoid an incomplete refresh of your data.

<table>
<thead>
<tr>
<th>Data Push Schedule*</th>
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<tr>
<td>9:00am - 9:15am</td>
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<tr>
<td>12:00pm - 12:15pm</td>
</tr>
<tr>
<td>3:00pm - 3:15pm</td>
</tr>
<tr>
<td>6:00pm - 6:15pm</td>
</tr>
<tr>
<td>9:00pm - 9:15pm</td>
</tr>
</tbody>
</table>

*Do not run reports during the push
Smart View Resources

http://budget.berkeley.edu/systems/calplanning/training/job-aids

Smart View Job Aids

- Smart View Dimension Member Selections with CalRptg Cheat Sheet (2/18/16)
- Searchable Smart View User Guide
- Exporting Query-Ready Reports into Smart View
- Restoring Smart View in MS Excel (8/24/15)
- Printing and Saving a Smart View File via Citrix Remote Access (4/16/14)

Citrax Web Browser for CalPlanning and SmartView
- Printing a CalPlanning Report via Citrix Remote Access (4/16/14)
- Citrix Technical Help: (4/22/14)
Smart View Installation for PC

• To use Smart View, the software add-in needs to be installed on your computer. You will need to work with your local IT personnel for this installation.

• The Smart View add-in and installation instructions are available at Software Central and is titled “Smart View Plug-In for Cal Planning”:

    http://ist.berkeley.edu/software-central/smartview

• The Smart View add-in installation adds a new menu and toolbar.
System Requirements for CalPlanning

Access the web-based Workspace at either:

• https://calpln-rptportal.berkeley.edu/workspace/index.jsp
• https://citrix.berkeley.edu

Details on the system requirements for CalPlanning (including Mac access)
The Help Desk-supported system requirements for CalPlanning are:

• Internet Explorer 10.x and Internet Explorer 11 with Enterprise Mode
• Windows 7 & 8.1
• Microsoft Office 2007, 2010 or 2013
• Adobe Acrobat Reader 7.0+ or higher
Support: Technical and Non-Technical

For technical help with the CalPlanning tool (including logging into or using CalPlan, CalRptg, HCP, HCPRptg and Smart View), contact:

- CalPlanning Help Desk
  - Hours: 8 a.m. to 5 p.m., Monday - Friday, except for University holidays
  - E-mail: calplanhelp@berkeley.edu
  - Phone: (510) 664-9000, Phone Tree: Option 1 (IT), Option 2, then Option 4 (CalPlanning)

For non-technical Budget Process help including questions about your Division’s requirements, decisions for your unit and your CalPlanning access contact your

- local CalPlanning Support Person
- Divisional Finance Leader (DFL)
- Campus Budget Office/Portfolio Budget Office (PBO)
  - Email: budget@berkeley.edu
  - Website: http://budget.berkeley.edu/index.html
Smart View Ribbon

When you connect to any of the MS Office applications you should see a Smart View Ribbon:

<table>
<thead>
<tr>
<th>GROUP</th>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>Panel</td>
<td>Allows you to open the Smart View Panel</td>
</tr>
<tr>
<td></td>
<td>Connections</td>
<td>Displays active or recently used connections</td>
</tr>
<tr>
<td>Edit</td>
<td>Undo/Redo</td>
<td>Allows you to undo or redo your last operation</td>
</tr>
<tr>
<td></td>
<td>Copy Data Point/Paste Data Point</td>
<td>Allows you to copy a data point or paste a previously copied data point</td>
</tr>
<tr>
<td></td>
<td>Functions</td>
<td>Allows you to Open the POV Manager or build a function formula</td>
</tr>
<tr>
<td>Data</td>
<td>Refresh</td>
<td>Refresh the data on the current worksheet from the data source</td>
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<tr>
<td></td>
<td>Submit Data</td>
<td>Submits data entered via Smart View</td>
</tr>
<tr>
<td>General</td>
<td>Options</td>
<td>Allows you to set how data is displayed</td>
</tr>
<tr>
<td></td>
<td>Help</td>
<td>Opens Smart View online help</td>
</tr>
<tr>
<td></td>
<td>Sheet Info</td>
<td>Displays general and connection information for the worksheet</td>
</tr>
<tr>
<td></td>
<td>More</td>
<td>Additional worksheet options</td>
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</table>
## Essbase Ribbon

This ribbon opens once you have connected to Essbase

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<tr>
<th>GROUP</th>
<th>BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Zoom In/Zoom Out</strong></td>
<td>Zooms in/out to members within the selected dimension hierarchy. Options include: Next Level, All Levels, Bottom Level, Same Level, Sibling Level, Same Generation, Formulas.</td>
</tr>
<tr>
<td></td>
<td><strong>Pivot</strong></td>
<td>Pivots dimensions from rows to columns or columns to rows. Options include: Pivot (on grid) Pivot To POV.</td>
</tr>
<tr>
<td></td>
<td><strong>Keep Only/Remove Only</strong></td>
<td>Keeps or removes members and associated data for the highlighted cell(s).</td>
</tr>
<tr>
<td></td>
<td><strong>Member Selection</strong></td>
<td>Opens the Member Selection dialog box.</td>
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<tr>
<td></td>
<td><strong>Query</strong></td>
<td>Opens options to design a query. Options include: Query Designer, Run Report, Execute MDX, Data Filter.</td>
</tr>
<tr>
<td></td>
<td><strong>Member Information</strong></td>
<td>Displays information about the selected member: generation, level, formulas, comments, attributes, UDAs.</td>
</tr>
<tr>
<td></td>
<td><strong>Preserve Format</strong></td>
<td>Preserves the cell formatting. This option is not available when the Use Excel Formatting checkbox has been selected in the Options menu.</td>
</tr>
<tr>
<td></td>
<td><strong>Change Alias</strong></td>
<td>Opens Alias Table which allows toggle between display member aliases or not.</td>
</tr>
<tr>
<td></td>
<td><strong>Data Perspective</strong></td>
<td>Tracks changes in values across an independent dimension.</td>
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<tr>
<td></td>
<td><strong>Smart Slice</strong></td>
<td>Saves the current grid as a Smart Slice.</td>
</tr>
<tr>
<td></td>
<td><strong>Cascade</strong></td>
<td>Creates separate reports on any dimension. Options include: Same Workbook, New Workbook, Different Workbook.</td>
</tr>
<tr>
<td></td>
<td><strong>Refresh</strong></td>
<td>Refreshes the data on the current worksheet from the data source. Options include: Refresh (current worksheet only), Refresh all Worksheets.</td>
</tr>
<tr>
<td></td>
<td><strong>POV</strong></td>
<td>Displays/hides the POV dialog box.</td>
</tr>
<tr>
<td></td>
<td><strong>View Comments</strong></td>
<td>From a list of all comments on the grid, select comments to view or edit.</td>
</tr>
<tr>
<td></td>
<td><strong>Calculate</strong></td>
<td>Recalculates the database after submitting changed data to see the results of the change.</td>
</tr>
<tr>
<td></td>
<td><strong>Visualize</strong></td>
<td>Displays selected dynamic data in an Excel grid or in Visual Explorer.</td>
</tr>
<tr>
<td></td>
<td><strong>Drill-through</strong></td>
<td>Displays a list of available drill-through reports for the selected cell.</td>
</tr>
<tr>
<td></td>
<td><strong>Linked Objects</strong></td>
<td>Associates cell notes, external files, and URLs with the selected data cell.</td>
</tr>
<tr>
<td></td>
<td><strong>Adjust</strong></td>
<td>Adjusts the value of the selected data cells by a percentage or fixed value.</td>
</tr>
<tr>
<td></td>
<td><strong>Submit Data</strong></td>
<td>Submits data entered via Smart View.</td>
</tr>
</tbody>
</table>
Key Concepts – Hierarchy Terms

Hierarchy: Understanding the Hyperion Family Tree

**Parent:**
A member that has an aggregated branch (children) below it
- E.g. Q1 is the parent to Jul, Aug, and Sep

**Children:**
Members that roll up to a parent
- E.g. Jul, Aug, and Sep are children of the parent Q1

**Descendants:**
All the members, regardless of whether they are children or parents in the hierarchy, that report under a particular member
- E.g. Quarters and months are descendants of Year Total
Key Concepts – Generation vs. Levels

**Generation:**
A layer in a hierarchical tree structure that defines member relationships in Essbase. Essbase orders generations incrementally from the top of the dimension (root) hierarchy to the bottom (leaf).

**Levels:**
A branch within a dimension. The levels are numbered incrementally from the leaf member (level 0) towards the root.