Budget Process Tools: Smart View Ad Hoc Basics 2

6.21.17

CalPlan  
HCP  
CalRptg  
HCPRptg  
Smart View

(Human Capital Planning)
Agenda

1. Smart View Ad Hoc Basics 1 Homework Review
2. Creating Multiple POVs in the Ad Hoc Grid
3. Cascading Reports in Smart View
4. Pivoting Dimensions within the Ad Hoc Grid
5. Importing Financial Reports from CalPlanning
6. Smart View Resources
3 Smart View Shared Connections:

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 Ad Hoc Basics 2 Materials

Classroom Handouts
- Smart View Ad Hoc Basics 2 Slide Presentation with Exercises

On-Line
- Smart View Job Aids and Materials
- Training Evaluation
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Smart View Ad Hoc Basics 1 Task List

- Check to see if you have the Smart View tab displays when you open MS Excel
- If no, submit a ticket with CalPlanHelp@Berkeley.edu requesting to have the Smart View Ad Hoc Plug installed on your workstation
- If yes, complete Exercise 4 from the Smart View Ad Hoc 1 Activity Packet to set your Smart View User Options
- Complete the Smart View Ad Hoc Basics 1 Homework
What did you learn about Smart View in doing your homework assignment?
Logging into Citrix and Connecting to Oracle Essbase

1. Follow the facilitator’s instructions for accessing [Citrix.berkeley.edu](http://Citrix.berkeley.edu)

2. Log into Citrix
   a. User Name = Your CalNet ID
   b. Password = Your CalNet Passphrase
   c. Click Log On

3. Double click on the Smart View icon from the applications displayed to open a new Excel workbook.

4. From the new MS Office Excel Workbook within Citrix, navigate to the Smart View menu option in the Excel Ribbon. Click the Panel icon to launch the Smart View Connection panel.

5. From the Smart View Home dialog box, Click Shared Connection.
6. When prompted enter your **CalNet User Name** and **Password**. Click **Connect**.
   a. User Name = Your CalNet ID
   b. Password = Your CalNet Passphrase
c. Click **Connect**

7. Select Oracle Essbase from the Select Server dropdown box.

8. Click on the + sign to expand the **EssbaseCluster-1** and navigate to > CalRptg > CalRptg. At the bottom on the screen, click **Ad hoc analysis**.
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. Not available with Citrix.
Reusing Essbase Files in Smart View

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.
Flow and Timing In Our Financial Landscape

**BFS/BAIRS**

1. **BAIRS**
   - Berkeley Administrative Initiative Reporting System
   - Nightly Actuals & Encumbrances

2. **BFS**
   - Berkeley Financial System
   - Monthly Summarized Actuals
   - Nightly Actuals

**CALPLANNING**

1. **CalPlan**
2. **Smart View**
   - 5xDaily* Summarized Compensation Plans
   - 5xDaily* Operating Budget & Forecast Plan Data

2. **HCP**
   - Human Capital Planning
   - 5xDaily* Detailed Position & Employee Compensation Plans

2. **CalRptg**
2. **HCP Rptg**

**HR**

1. **HCM**
   - Human Capital Management
   - Position Management
   - Annual Snapshot Detailed Employee & Position Data
   - HCM snapshot on 1/30/2017 of active data from 7/01/2016 and forward.

2. **PPS**
   - Payroll Personnel System
   - Monthly Detailed Employee Payroll Actuals

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*CalPlanning data push time is every three hours starting at 9:00am to 9:00pm. Check [http://budget.berkeley.edu/systems/calplanning](http://budget.berkeley.edu/systems/calplanning) for the current data push schedule.*
Saving Essbase Files in Smart View Citrix

Do a **Save As** action and place your file in a preferred folder within the Computer. *Do NOT select Favorites > Desktop or >Downloads from within Citrix.*
Smart View Options

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.
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.
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 Panel](image)

<table>
<thead>
<tr>
<th>Member Name</th>
<th>Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>A42000</td>
<td>42000 - U.S. Government Appropriations</td>
</tr>
<tr>
<td>A42090</td>
<td>42090 - Federal Approp - Contra - BD</td>
</tr>
<tr>
<td>A42100</td>
<td>42100 - U.S. Government Grants</td>
</tr>
<tr>
<td>A42190</td>
<td>42190 - Federal Grants - Contra - BD</td>
</tr>
<tr>
<td>A42200</td>
<td>42200 - U.S. Government Contracts</td>
</tr>
<tr>
<td>A42290</td>
<td>42290 - Federal Contracts - Contra-BD</td>
</tr>
<tr>
<td>A42300</td>
<td>42300 - US Govt Federal Capital Contr</td>
</tr>
<tr>
<td>A42400</td>
<td>42400 - Federal Loans Received</td>
</tr>
<tr>
<td>A42XXX_Plan</td>
<td>42XXX - Federal Contracts &amp; Grants - Direct - Plan</td>
</tr>
</tbody>
</table>
Essbase: Change Alias

- **Alias Table = None**: Displays member name only for all dimensions.

- **Alias Table = Default**: Displays alias & member name for all dimensions.
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
Selecting POV Dimension Members in the Rows

- Members default populate horizontally
- When selecting members for a dimension in the rows, check the “Fill Vertically” box
Create a Smart View Ad Hoc Report

Create a Smart View report for this year’s forecast of current funds that includes your:

- Salaries & Wages
- Employee Benefits
- Compensation Expenses
- Non-Compensation Expenses
- Total Expenses
- Total Revenue & Transfers
Create a Smart View Ad Hoc Report

Which member selection approach did you use to create your account list?

What questions does this analysis generate for you about your forecast?
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Essbase Ribbon Features

- Zoom In
- Zoom Out
- Keep Only
- Remove Only
- Member Selection
- Refresh
- Change Alias
- Pivot
- Cascade
Approach to Creating Multiple POVs within the Grid

1. What question are you trying to solve for with your Smart View Ad Hoc analysis?

   What is the trend in Compensation Expenses for the last three years? What is the average? What % are they to Total Expenses?

2. Identify which Dimensions will be consistent in all POVs. Place these dimensions in the default POV location, row #1.

   - Scenario
   - Version
   - Entity
   - Period
   - Account
   - Chart 1 & 2
   - Funds
   - Program Code
   - Time Series

3. Identify which Dimensions will vary in all POVs. Allow for one row below the default row #1 for each of these dimensions.

   - Year
Creating Multiple POVs within the Grid 1 of 2

- Identify which **Dimensions** will be constant in all POVs. These will stay in the default POV location, row #1.

- Delete the dimensions that will vary and move constant Dimensions as needed to default row #1.

- Insert rows below default row #1 for each varying Dimension.

---

<table>
<thead>
<tr>
<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>
<th>J</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Forecast</td>
<td>Working</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>FY17</td>
<td></td>
<td></td>
<td>1_CO1NR - College of Natural Resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Year Total**

- Salaries & Wages: $36,036,225
- Employee Benefits: $10,728,023
- Total Compensation: $46,764,247

---

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<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></td>
<td>Current</td>
<td>Program</td>
<td>Chart1</td>
<td>Chart2</td>
<td>Periodic ($)</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>1_CO1NR - College of Natural Resources</td>
<td></td>
<td>Code</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Salaries & Wages: $36,036,225
- Employee Benefits: $10,728,023
- Total Compensation: $46,764,247

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Creating Multiple POVs within the Grid 2 of 2

• **Move, Copy &/or Free Form enter your varying** Dimension members in stacks keeping like dimensions aligned in the same rows.

• **Click Refresh**
Steps for Creating Multiple POV within the Grid

1. From your basic ad hoc report, identify which Dimension Members will be consistent in all POVs within the grid. Keep these Dimensions in POV default row #1.

2. **Insert** one row below the default row to hold each Dimension that will vary across the stacked dimensions and NOT be stored in the POV default row #1. These Dimensions will be stacked in the Column display area.

3. **Move/Copy/Free Form edit varying** Dimension members in stacks keeping like dimensions aligned in the same rows.

4. Click **Refresh**.
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Cascading Reports

**Cascade** automatically replicates versions of a current ad hoc report along one dimension for user defined members. Each report version is populated on a separate **tab** of an Excel workbook of your choice:

- Current workbook
- New workbook
- Existing workbook

Tabs labeled with the dimension member defined in the cascade.

*Excel limits tab names to only 31 characters*
Cascading with Smart View

1. Click **Cascade** and select either
   - Same
   - New
   - Different workbooks to store the cascaded files.

2. From the **Member Selection** dialog box choose which Dimension you want to cascade and select the individual members.

3. Click **OK**.
Cascading

1. Click on the Dimension cell you would like to Cascade or create a version of this report for other members.
2. Click on **Cascade** from the Essbase Ribbon.
3. Choose the destination of the cascaded reports
   - Current Workbook
   - New Workbook
   - Existing Workbook
4. From the Member Selections Dialog box check the box preceding each members you would like to create a version of this report.
5. Click on the right facing arrow move them to the right hand Selected frame.
6. Click **OK**.
7. Navigate through the tabs of your new report. **Save** your workbook.
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Pivoting in Smart View

Pivoting allows you to swap dimensions:

• Between columns and rows
• Between the worksheet and POV

Smart View requires one dimension in the row display area and one dimension in the column display area at all times.

• This means that you must have at least two dimensions in rows or columns before you are able to pivot.
Pivoting Dimensions in the Ad Hoc Grid

1. Select the Dimension you would like to Pivot from the Column to the Row or the Row to the Column
2. Navigate to the Essbase ribbon
3. Click on Pivot

Zoom In to Next Level to display to Departments
Pivoting Dimensions: Ad Hoc Grid -> Floating POV

Pivoting dimensions from the Ad Hoc Grid to the Floating POV:

1. Move the POV from the Essbase Ribbon to the ad hoc grid.
2. Click on the dimension you want to move in the grid.
3. Select Pivot -> Pivot to POV from the Essbase ribbon to move the dimension to the POV toolbar.
Moving Dimensions: Floating POV -> Ad Hoc Grid

Moving dimensions to the Grid:
1. Right-click on the dropdown arrow of the Dimension in the Floating POV and drag to a row or column in the grid.
2. Release the right click.
3. There is no Pivot to Grid option in Smart View. Dimensions can only be added with an active Smart View connection.
Pivoting Exercise

In this exercise you will create a report that shows your Total Revenue by Department and Fund Type for next year’s Operating Budget.

1. Add a new worksheet to your workbook and connect to Essbase.
2. Select members to return the desired report data. Use the dimensions of your choice for those not defined above.
3. Click on your entity and select Pivot -> Pivot to move Entity to the Row Display area.
4. Entity pivots to the row display area.
Pivoting Exercise, cont.

5. Select Total Revenue and select Pivot -> Pivot to move Account to the Default POV Row 1.

6. Account is in the Default POV row 1.

7. Click on the Fund Dimension in the Default POV Row 1 and select Pivot -> Pivot to move Fund to the Row Display area.

8. Select Entity and Fund in the Row Display area and Zoom In one level.
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Importing CalPlanning Financial Reporting Documents into Smart View

- Select "Reporting and Analysis Framework" from the list of connections.
- Navigate to the "Budget Process Reports" folder and select "CR120 - SRECNA Trend".
Importing as Fully Formatted or Query-Ready

- **Fully Formatted** maintains CalPlanning HTML display in Smart View
- **Query-Ready** displays raw data ready for ad hoc analysis using like Oracle Essbase data cube.
Smart View Financial Reporting Framework

Import Document As

Fully Formatted

Import Document As

Query-Ready

Excel screenshots showing financial data and trend analysis.

Revenues and Operating Transfers
- Net Tuition and Fees
- Private Gifts for Current Use
- Investment Income
- Sales and Services
- Total Revenue

Campus Support

Total Compensation

CR120 - SRECNA Trend Sheet5

CR120 - SRECNA TR(1) CR120 - SRECNA TR(2)
Importing a Query-Ready CalPlanning Report

1. Add a new worksheet to your workbook and connect to the Reporting and Analysis Framework.
2. Expand the folders to navigate to CalPlanning -> CalRptg and select the CR120 Trend Report.
3. From the Import Workspace Document dialog box, from the Import Document As drop down select Query-Ready.
4. Click Finish. Locate the complete CR120 data from the multiple worksheets that were added to your Excel workbook. See graphic on slide #42.
5. Change cell background color to white. Delete the additional worksheets.
6. Connect to Oracle Essbase to perform additional analysis.
Importing a Fully Formatted CalPlanning Report

1. Add a new worksheet to your workbook and connect to the Reporting and Analysis Framework.
2. Expand the folders to navigate to CalPlanning -> CalRptg and select the CR120 Trend Report.
3. From the Import Workspace Document dialog box, from the Import Document As drop down select Fully Formatted.
4. Click Finish.
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Check out the CalPlanning website for up to date info on:

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

http://calplanning.berkeley.edu
Budget Process Calendar on bConnected

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

1. From your bConnected calendar navigate to the left frame
2. Type **Budget_Process** to locate “Budget_Process Departmental” <budget_process@Berkeley.edu>
3. Click on the link to 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 calendar
Smart View Resources

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

CalPlanning | CalPlanning Smart View Ad Hoc Basics 2

June 2017

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System Requirements for Smart View

• Details on the system requirements for CalPlanning (including Mac access)
  – The Help Desk-supported system requirements for CalPlanning are:
    – Windows 7
    – Microsoft Office 2007 or 2010
    – Adobe Acrobat Reader 7.0+ or higher
    – Internet Explorer 9.x
    – Firefox 10.x

• If you are not ready to upgrade, you can use CITRIX to access a remote desktop. Details and link are available on the CalPlanning website at:
  – [http://budget.berkeley.edu/systems/calplanning](http://budget.berkeley.edu/systems/calplanning)
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.
APPENDIX
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>
</tr>
<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>
</tr>
</tbody>
</table>
### Essbase Ribbon

This ribbon opens once you have connected to Essbase

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