Smart View
Training Guide

Cornerstone
Transforming the Way We Work at Rutgers
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What is Smart View?

- Microsoft Office Add-in for Oracle
- Allows users to dynamically access live data from Essbase
- Allows reporting via Ad-hoc functionality or via Excel functions to create queries
- Users can apply Excel formatting to imported data
- Templates can be saved for future use and update with live data with a simple “refresh”

Installing Smart View

1. You will need OIT administrative rights to install Smart View on your computer
2. The .exe can be downloaded from the course Canvas page: https://rutgers.instructure.com/courses/3442
3. After you download the file, right click the file and select Run as administrator
4. Once Smart View is installed, set your shared connection URL by clicking on the Smart View tab in Excel, then click Options.
5. Under Advanced, type or copy/paste the following URL in the Shared Connections URL field: https://ecbg.bi.us2.oraclecloud.com/workspace/SmartViewProviders
Establishing a Connection

1. Open up Microsoft Excel. Click the Smartview Panel

2. Select the Shared Connections link on the right side of the Worksheet

3. When you first open the spreadsheet and to give you access to connect to the data source, a Rutgers users authentication window will open. Enter NetID and Password credentials to gain access.
4. Click on the Select Server to proceed field drop down arrow. Click on Oracle EssBase Shared Connection.

5. Click on db-Essbase_FA_Cluster_RUCOAIInstance

6. Click Connect located on the bottom right
Ad-Hoc Analysis

A Smart View Ad-Hoc analysis allows you to create dynamic reports with which you can zoom in and out of the different dimensions of data in Oracle Essbase. Reports are highly customizable, and once created and saved can be easily updated and refreshed to provide the latest data.

Creating an Ad-Hoc Analysis

1. Once connected to the database, click on the Ad hoc analysis link located on the bottom right in the panel:

Your tool bar will now have the Essbase Tab and the Ad-Hoc Grid dimensions will be loaded in the top three rows.
Dimensions Layout

When you start an ad-hoc analysis, you will see three rows of dimensions at the top of your spreadsheet.

These dimensions are arranged to form a grid. At the cross-section of this grid—cell B3—is where the data is placed. You will see “#No Access” to start because none of the dimensions have been specified.

To create your own ad-hoc analysis, you will arrange the various dimensions into three rows based on how you want to filter your data:

1. **Page Dimensions** – the dimensions in the topmost row of dimensions in an ad-hoc analysis are the page dimensions. They serve as global filters for all data on the current worksheet.
2. **Column Dimensions** – any dimensions directly under the page dimensions are column dimensions that filter the data displayed in that column. Multiple dimensions can be stacked here so long as they are all under the page dimensions.
3. **Row Dimensions** – any dimensions below AND to the left of the column dimensions are row dimensions. They control what dimension you are searching by. For instance, Figure 2 has the “Account” dimension as a row dimension, so the data provided is that in the selected accounts filtered by the column and page dimensions.

The figure above shows a simple Ad-Hoc Analysis with Page, Column, and Row Dimensions aligned to produce a simple analysis of one month’s Beginning Balance, Period Activity, and Ending Balance.

Dimensions can be dragged, cut and pasted, copy and pasted, or moved using the [POV tool](#).
Dimensions Overview

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ledger</td>
<td>There is currently only one. Select “Rutgers Ledger”.</td>
</tr>
<tr>
<td>Unit</td>
<td>The string segment that corresponds to your Unit.</td>
</tr>
<tr>
<td>Division</td>
<td>The string segment that corresponds to your Division.</td>
</tr>
<tr>
<td>Organization</td>
<td>The string segment that corresponds to your Organization.</td>
</tr>
<tr>
<td>Location</td>
<td>The location to filter data by.</td>
</tr>
<tr>
<td>Fund Type</td>
<td>The fund type to filter data by.</td>
</tr>
<tr>
<td>Business Line</td>
<td>The business line to filter data by.</td>
</tr>
<tr>
<td>Account</td>
<td>The natural account to filter data by.</td>
</tr>
<tr>
<td>Activity</td>
<td>The activity type.</td>
</tr>
<tr>
<td>IntraUnit</td>
<td>The other unit in an intra-unit transaction. Select “All IntraUnit Values” if your unit does not have any intra-unit transactions.</td>
</tr>
<tr>
<td>Future</td>
<td>A placeholder dimension for future values. Select “All Future Values”.</td>
</tr>
<tr>
<td>Scenario</td>
<td>Actual, Budget, or Encumbrance, as well as any children categories they contain.</td>
</tr>
<tr>
<td>Balance Amount</td>
<td>Beginning Balance, Period Activity, or Ending Balance, with credit/debit for each.</td>
</tr>
<tr>
<td>Amount Type</td>
<td>Base, PTD, QTD, YTD. You will mostly want to use PTD or YTD.</td>
</tr>
<tr>
<td>Currency</td>
<td>Select USD.</td>
</tr>
<tr>
<td>Currency Type</td>
<td>You will want to select “Total”.</td>
</tr>
<tr>
<td>Accounting Period</td>
<td>Can be months, quarters, or years.</td>
</tr>
</tbody>
</table>

Changing Dimensions
All dimensions must have a selected value for the Ad-Hoc analysis to work.

Member Selection

The most reliable way to change dimensions is to highlight the cell of the dimension you want to change and click Member Selection in the Essbase tab.

This will open the Member Selection tool.
1. **Dimension Selection** – this will populate with the dimension of the highlighted cell by default, but can be changed to another dimension as a way of manipulating the grid as well.

2. **Hierarchy** – lists all the available values for the selected dimension. The top hierarchy labeled *All Dimension Values* contains all the lowest level values. The bottom hierarchy (Current) contains the full hierarchy of values with all parent and children values.

3. **Selection Arrows** – moves all selected values between the two panes of the *Member Selection* tool.

4. **Selected Pane** – contains all currently selected values for the dimension

5. **Member Selection Options** – where the user can change display options for the *Member Selection* tool, including displaying names and descriptions.

Select a value from the left-hand side and use the selection arrow to move it to the *Selected Pane*. Click *OK* to confirm your selection. If multiple values are selected, SmartView will create a row for each value.
Query-Designer

An effective way to create your query without having to manually drag or copy/paste dimensions is to use the Query Designer to create your grid and POV.

To use the Query Designer, click on the Query button and select Query Designer. Depending on your version of Smart View, this may be towards the left under Member Selection or on the right-hand side.

This will create a Query Designer panel that can be docked on top or to the right of the Excel grid.

Using the Query Designer, users can form the Excel grid for their Ad-Hoc Query by dragging dimensions to the Columns, Rows, or POV sections as desired. Clicking on dimensions in the Rows or Columns section will open the Member Selection pane. The POV continues to function as outlined in the next section. Click on Apply Query once you have chosen values for all dimensions.
POV

Selecting the **POV** tool in the *Essbase* tab will hide the page dimensions and move them to a POV panel. This panel can be used to easily change between values for each of the page dimensions.

**POV Button:**

Before POV:

![Before POV](image1)

After POV:

![After POV](image2)
This panel can be left free-floating or docked on the top or right-hand side by dragging it to the desired location.
Pivoting POV Dimensions (if not using Query Designer)

Dimensions can be moved from the POV to the Grid to create column or row dimensions, or from the columns/rows to the POV to create page dimensions. **You must always have at least one row dimension**, so do not attempt to move the last row dimension to the POV without first moving a dimension from the POV to the Grid.

From the POV to the Grid (if not using Query Designer)

To move a dimension from the POV to the Grid, **right click the drop-down arrow next to the dimension and drag it on top of the current row/column dimension.** This will create a new row or column with the new dimension.
From the Grid to the POV (if not using Query Designer)

To move a dimension from the Grid to the POV:

1. Click the dimension to select it
2. From the Essbase tab, click the arrow next to Pivot and select Pivot to POV.

Changing POV Dimensions

To change the value of a POV dimension, click the drop-down arrow and select ...

This will bring you to the Member Selection Dialog. All values sent to the Selected Pane will be added to the POV dropdown menu for easy switching.
Most formatting options can be accessed from the *Options* menu in the *SmartView* tab.

Show Aliases
Suppress Rows with Missing Data
Replace #Missing with 0
Excel Formatting for Cells

Additional Resources

Oracle's Official Smart View Documentation