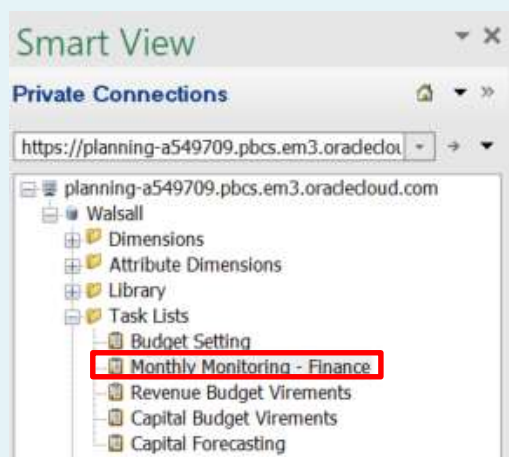


Revenue Monitoring- Ad-hoc Zoom In-Out Process

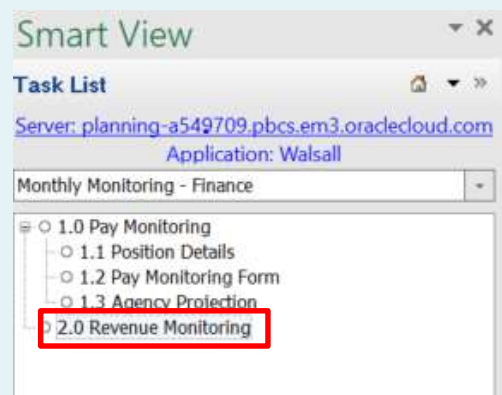
1

Revenue Monitoring – Ad-hoc Zoom In/Out Process

1. Select the form you want to work on by selecting it from the **Smart View** panel i.e. Pay Monitoring by selecting the Monthly Monitoring- Finance Option shown below:



This will expand into the options below. Select Revenue Monitoring



2

2. Once the form is open select **Analyze** to open the form in **Ad-Hoc**. This will open another tab and allow you to enter data at multiple cost centre level.

The screenshot shows the 'Ad-Hoc' form interface. The 'Analyze' button in the top toolbar is highlighted with a red box. Below the toolbar, there is a table with columns A, B, C, T, and Y. The table contains data for various employee categories and their associated costs.

	A	B	C	T	Y
2		Prior Year Outturn (£)	Annual Budget (£)	Actuals (£)	
		Details	Y-T-D(Feb)	+YearTotal	
4					
5		Balances Version	Mar Monitoring	Balances Version	
10	+Direct Employee Expense	863897	921921	838126	
11	17001 : Salaried Employees - Holiday Pay			3128	
12	17002 : Salaried Employees - Overtime	1254	2255	953	
13	17006 : Salaried Employees - Other Allowances			43	
14	34200 : Insurance Premiums - Employees	1916			
15	34302 : Gratuities	684	627	350	
16	34303 : Compensation			14766	

The screenshot shows a 'POV [Book3]Sh...' pop-up form. It contains several dropdown menus for selecting details, budget, working, default properties, fiscal year, and a specific service. A 'Refresh' button is at the bottom.

- This pop up will appear on screen.
- If not, click the '**POV**' button located near the top.
- Drag the pop up to the top of the workbook to keep it in view just below the smart view ribbon.

Revenue Monitoring- Ad-hoc Zoom In-Out Process

3

3. For the next stage, you must **Drag and Drop** the **Service Type, Cost Centre & AD** fields into the spreadsheet by hovering over the field and dragging it with your mouse.

	A	B	C	D
1		FY18	FY19	FY19
2		Prior Year Outturn (E)	Annual Budget (E)	Actuals (E)
3		Actual	Budget	Actual
4		Details		
5		Balances Version	Y-T-D(Feb)	Apr
6	Total Subjective	53616	73381	-175906

Please note the data should be in the following order and look like the image below

- 1-Service Type should be in Column A – Drag and drop between Column A and the numbers
- 2- Cost Centre should be in Column B- Drag and drop between Column A & B
- 3- Additional should be in Column C- Drag and drop between Column B & C
- 4-Total Subjective should be in Column D

4

4. Scroll to find **Total Subjective** select this cell and click **Keep only** in the planning ad-hoc ribbon.

	A	B	C	D	E	F	G	H	I
1	FY18	FY19	FY19	FY19	FY19	FY19	FY19	FY19	FY19
2	Prior Year Outturn (E)	Annual Budget (E)	Actuals (E)	Actuals (E)	Actuals (E)	Actuals (E)	Actuals (E)	Actuals (E)	Actuals (E)
3	Actual	Budget	Actual	Actual	Actual	Actual	Actual	Actual	Actual
4	Details								
5	Balances Version	Y-T-D(Feb)	Apr	May	Jun	Q1	Jul	Balances Version	Balances Version
6	Total Subjective	53616	73381	-175906	222253	-336606	-290258	966	

5. You should have just **one line** where you can now bring in your data for your code service areas at multiple cost centre level. To adjust your Service Type & Cost Centre to show the data you want please see below:

	A	B	C	D	E	F	G	H	I
1	FY18	FY19	FY19	FY19	FY19	FY19	FY19	FY19	FY19
2	Prior Year Outturn (E)	Annual Budget (E)	Actuals (E)	Actuals (E)	Actuals (E)	Actuals (E)	Actuals (E)	Actuals (E)	Actuals (E)
3	Actual	Budget	Actual	Actual	Actual	Actual	Actual	Actual	Actual
4	Details								
5	Balances Version	Y-T-D(Feb)	Apr	May	Jun	Balances Version	Balances Version	Balances Version	Balances Version
6	Total Subjective	53616	73381	-175906	222253	-336606			

Revenue Monitoring- Ad-hoc Zoom In-Out Process

5

6. Select the **Additional** cell (AD0000) in **Column C** and click **Zoom Out** in the planning ad-hoc ribbon until you reach **Total Additional** in the cell as shown in the images below:

POV [Book3]Sheet8_1

Details Budget-20 Working Default Properties FY20 Refresh

C2

	A	B	C
1			
2	6222:Vulnerable Children	2221101 : Initial Response Service	AD0000 : Default
3	6222:Vulnerable Children	2221101 : Initial Response Service	AD0000 : Default
4	6222:Vulnerable Children	2221101 : Initial Response Service	AD0000 : Default

POV [Book1]Sheet2_1

Details FY19 Working Default Properties Refresh

C3

	A	B	C	D	E	F	G
1						Actual	Actual
2						Current Grade	Prev Years' Spinal Point
3	6633:Benefits	6331060 : Processing	Total Additional	Total Employee	Total Position		

6

7. Select the cost centre in **Column B** and Click **Zoom Out** until you reach to the area you want to work on. For example **LEGAL** service area.

POV [Book1]Sheet2_1

Details FY19 Working Default Properties Refresh

C7

	A	B	C	D	E	F	G
1						Actual	Actual
2						Current Grade	Prev Year
3	6610:Legal & Democratic Services	E490000 : LEGAL	Total Additional	Total Employee	Total Position		
4							

8. Select the **Service Type** cell (6610) in **Column A** and click **Zoom Out** in the planning ad-hoc ribbon until you reach **Total Service Type** in the cell as shown in the images below:

POV [Book1]Sheet2_1

Details FY19 Working Default Properties Refresh

F8

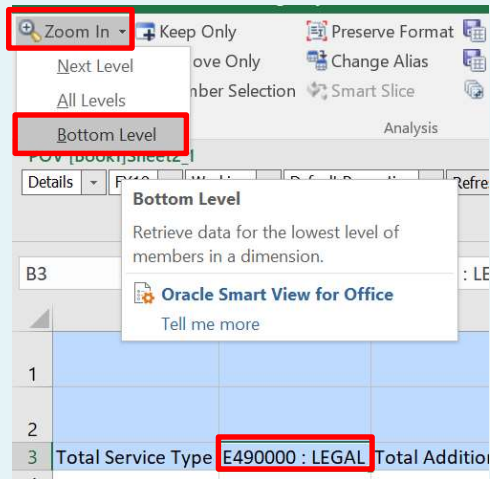
	A	B	C	D	E	F	G
1						Actual	Actual
2						Current Grade	Prev Years' Spinal Point
3	Total Service Type	E490000 : LEGAL	Total Additional	Total Employee	Total Position		

Revenue Monitoring- Ad-hoc Zoom In-Out Process

7

9. To pull the relevant data relating to your code combinations you need to now zoom into the lowest levels so you can input data into the forms.

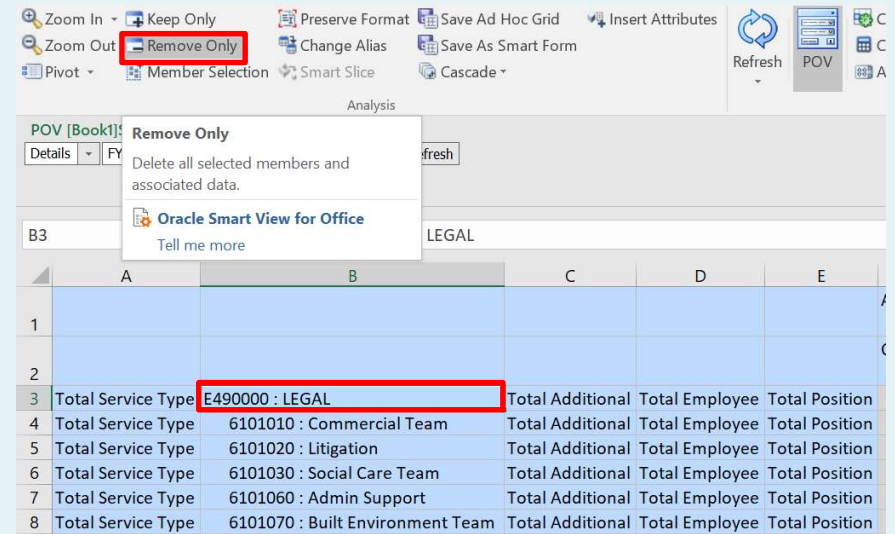
10. Select the **Service Area** in **Column B** and click the drop down arrow next to **Zoom In** and **Select Bottom Level**.



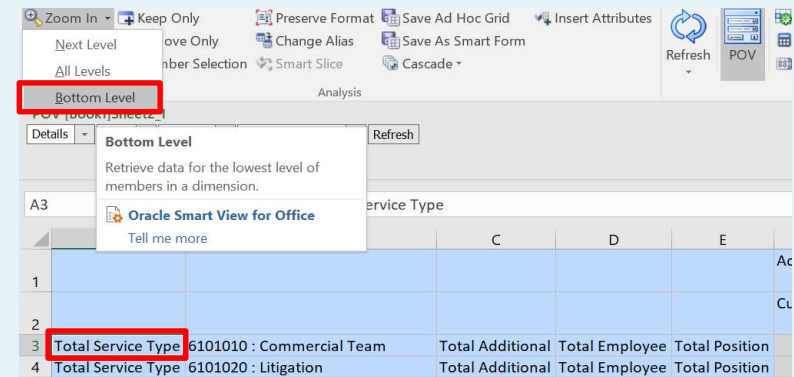
This will bring in all the cost centres relating to that service area as shown below.

11. Select the **Cost Centre Heading (LEGAL)** and click **Remove Only** in the planning ad-hoc ribbon to remove this line.

8



12. Select **Total Service Type** in **Column A** and click **Zoom In, Bottom Level** to view all Service Types available within Legal. (or the area you have chosen).



Revenue Monitoring- Ad-hoc Zoom In-Out Process

9

13. Select **Total Service Type** and click **Remove Only** to get rid of this line.

The screenshot shows the Oracle Smart View for Office interface. The 'Remove Only' context menu is open over the 'Total Service Type' row in the 'Total Additional' column. The menu options include 'Delete all selected members and associated data.' and 'Oracle Smart View for Office Tell me more'.

	A	B	C	D	E
1					
2					
3	Total Service Type	6101010 : Commercial Team	Total Additional	Total Employee	Total Position
4	6610:Legal & Democratic Services	6101010 : Commercial Team	Total Additional	Total Employee	Total Position
5	Total Service Type	6101020 : Litigation	Total Additional	Total Employee	Total Position
6	6610:Legal & Democratic Services	6101020 : Litigation	Total Additional	Total Employee	Total Position
7	Total Service Type	6101030 : Social Care Team	Total Additional	Total Employee	Total Position

14. Select **Total Additional** in Column C and click **Zoom In Bottom Level**. This will bring up all the additional codes relating to the area selected.

The screenshot shows the Oracle Smart View for Office interface. The 'Zoom In Bottom Level' context menu is open over the 'Total Additional' cell in the 'Total Additional' column. The menu options include 'Next Level', 'All Levels', and 'Bottom Level'.

	A	B	C	D	E
1					
2					
3	Total Service Type	6101010 : Commercial Team	Total Additional	Total Employee	Total Position
4	6610:Legal & Democratic Services	6101010 : Commercial Team	Total Additional	Total Employee	Total Position
5	Total Service Type	6101020 : Litigation	Total Additional	Total Employee	Total Position
6	6610:Legal & Democratic Services	6101020 : Litigation	Total Additional	Total Employee	Total Position

10

15. Select **Total Additional** and click **Remove Only** to get rid of this line.

The screenshot shows the Oracle Smart View for Office interface. The 'Remove Only' context menu is open over the 'Total Additional' cell in the 'Total Additional' column. The menu options include 'Delete all selected members and associated data.' and 'Oracle Smart View for Office Tell me more'.

	A	B	C	D	E
1					
2					
3	Total Service Type	6101010 : Commercial Team	Total Additional	Total Employee	Total Position
4	Total Service Type	6101010 : Commercial Team	AD00000 : Default	Total Employee	Total Position
5	6610:Legal & Democratic Services	6101010 : Commercial Team	Total Additional	Total Employee	Total Position

16. Select **Total Subjective** in Column D and click **Zoom in, Bottom Level**. This will bring up all the subjectives related to that area.

The screenshot shows the Oracle Smart View for Office interface. The 'Zoom in, Bottom Level' context menu is open over the 'Total Subjective' cell in the 'Total Subjective' column. The menu options include 'Next Level', 'All Levels', and 'Bottom Level'.

	A	B	C	D	E	F	G	H	I
1									
2									
3	Total Service Type	6101010 : Commercial Team	Total Additional	Total Employee	Total Position				
4	6610:Legal & Democratic Services	6101010 : Commercial Team	Total Additional	Total Employee	Total Position				
5	Total Service Type	6101020 : Litigation	Total Additional	Total Employee	Total Position				
6	6610:Legal & Democratic Services	6101020 : Litigation	Total Additional	Total Employee	Total Position				

17. You will then be left with data you are able to require and can manipulate. The cells which are editable will turn **YELLOW**, which is when you will know you can enter your forecast information.

Further Support If you have any further queries, please contact the **One Source helpdesk** on **01922 654320**.