Compliment the Excel Add-In or SmartView with Excel Custom Lists

Many people use Custom Lists in Excel – sometimes without even knowing. If you have ever typed January into a cell and used autofill (click the dark plus sign, and drag across other cells) to create February through December, you have used Custom Lists.

Excel has a few Custom Lists setup for users when it is installed. Select the Tools / Options menu, and display the Custom Lists tab to view them. Users can create their own Custom Lists in this dialog box by entering a list separated by commas or importing a range of cells that already includes a list.

For Essbase users who use the Hyperion Spreadsheet Add-In or SmartView, this can become a valuable tool. Many times Essbase users will want to display a specific list of accounts, measures, products, etc. Rather than selecting these from the member selection, or typing them, Custom Lists can be created and used to reduce the effort.

Let's assume a user is responsible for a subset of the existing products and those products are only sold in a few of the markets. The user may spend a lot of time creating the market list every time they create a new retrieve. If the user creates a Custom List, they can automate this selection process. A Custom List might include the following members.

Columbus,Cincinnati,Los Angeles,Tempe,Dallas,Austin,Seattle,Denver,Nashville

All the user has to do now is type Columbus in the first cell and use the autofill to list the rest of the markets. This

function can save those who frequently create add hoc reports a lot of time.

Custom Lists can be created for just about anything, are easy and quick to create, and are useful in a variety of situations. www.In2Hyperion.com is not just for those in a technical capacity. User related ideas, such as using Custom Lists, will become more prevalent on this site. Sign up for our newsletter and receive notifications when more Excel tips for Essbase users become available.