Hyperion SmartView Manual

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Installation Instructions

- First, verify no older versions exist and uninstall them if they do:

- Click the Start Menu and choose Settings. Choose Apps and check the list for Oracle Smart View 64-bit for Office or Oracle Smart View 32-bit for Office. Both of these should be uninstalled before proceeding.

- Click the item and choose Uninstall.

Oracle Smart View 64-bit for Office   337 MB
Oracle Corporation   11/14/2017
11.1.2.5.700

Modify   Uninstall
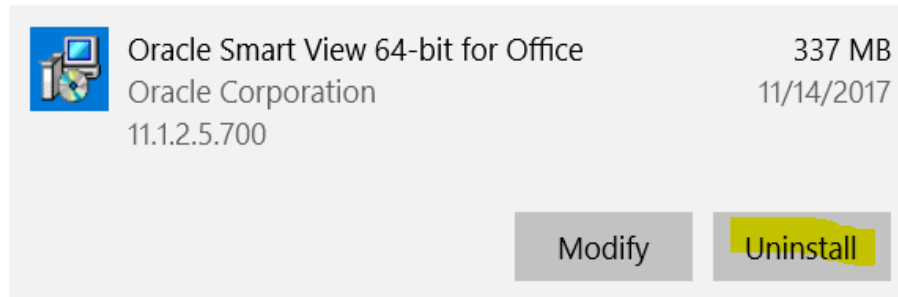
- Reboot your computer before proceeding.

Installation Instructions (cont.)

To install the latest version of SmartView:

- Log into Hyperion at https://foundation01.clemson.edu:4443/workspace/index.jsp
- Click on Tools > Install > Smartview
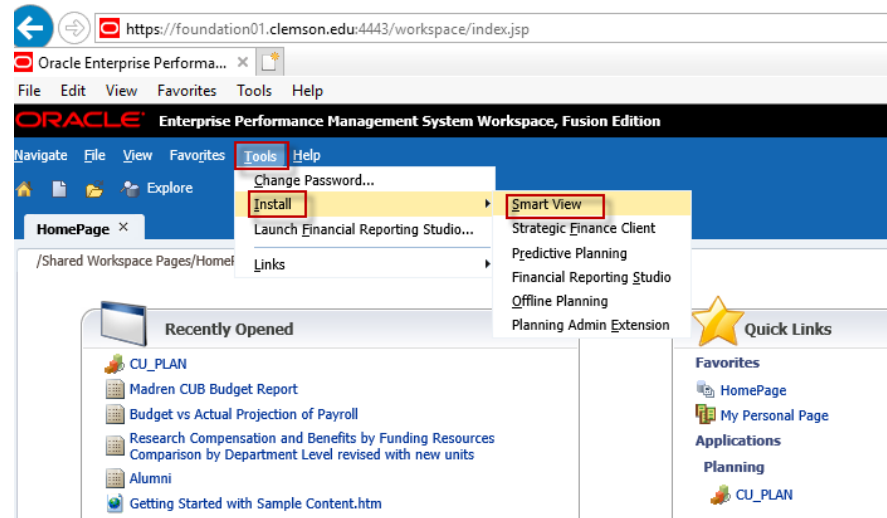

- Save the file on your computer
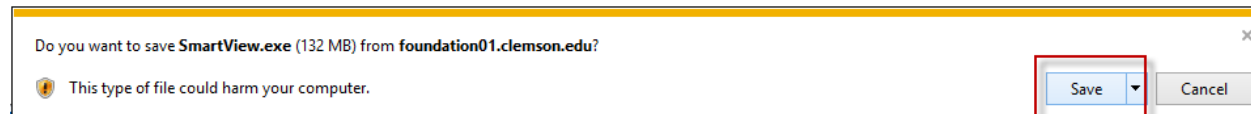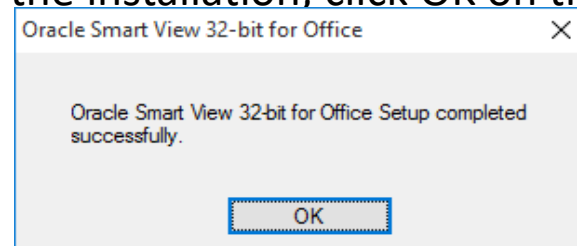
Installation Instructions (cont.)

- Close all Microsoft Office applications (Outlook, Excel, Word, PowerPoint).
- Find the downloaded SmartView.exe file. (Unless you specify otherwise, the Smartview.exe file will be saved by default into your C:\Downloads folder. If you've downloaded more than one SmartView.exe file, select the one with the highest number in the parenthesis at the end of the file name. The "Date Modified" of the SmartView.exe file is also an indicator of your most recent version that you just downloaded). Then, right click on this SmartView.exe file to "Run as Administrator".
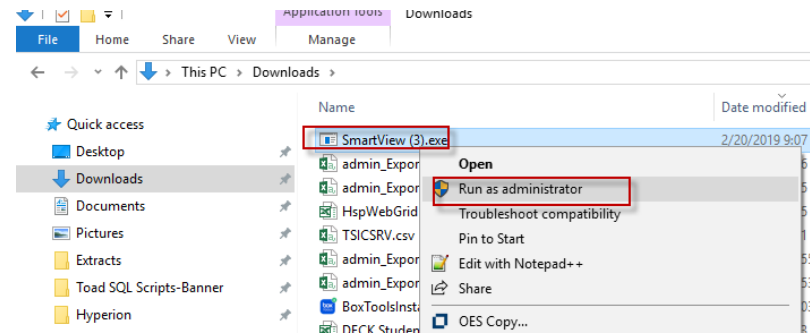
- Choose "Yes" to allow this app to make changes to your computer.
- Leave the default for destination folder and click OK.
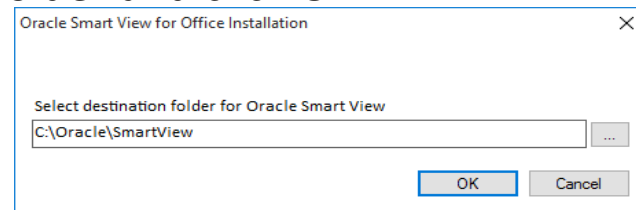
- Several screens will flash, and after the installation, click OK on the message shown below.

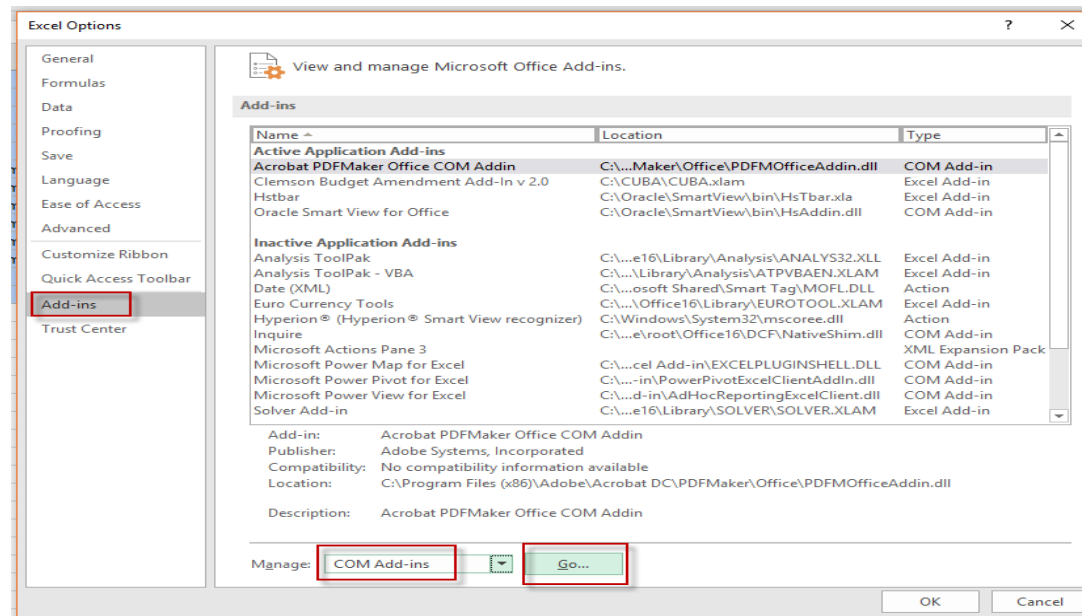# Installation Instructions (cont.)

If prompted (possible if reinstalling), reboot.

Open Excel. If you do not see SmartView in the top ribbon,

Select "File" from the top menu. Select "Options" and then "Add-Ins". At the bottom of that Window, in Manage, choose "COM Add-Ins" and hit "Go".

Make sure the "Oracle Smart View for Office" is selected and click "OK". Then, close and re-open Excel.

Installation Instructions (cont.)

For the first use/connection, select the Smart View ribbon. Select Option
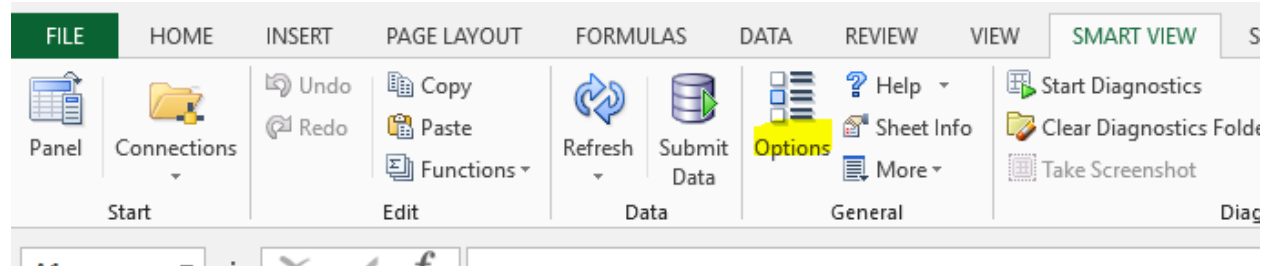
Click on Advanced and make sure the Share Connection URL is
https://foundation01.clemson.edu:4443/workspace/SmartViewProviders
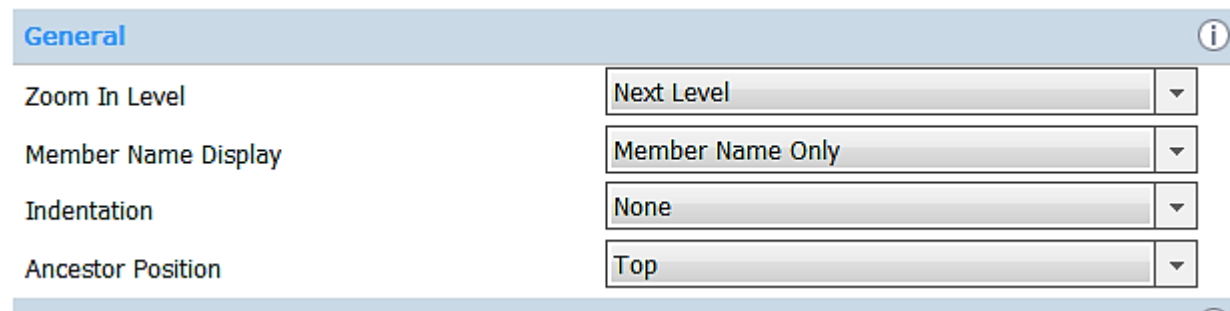
Please note: A blank sheet or existing worksheet has to be open to use SmartView.

If you have any questions or issues, please send an email to Jessica Marchant (jstoots@clemson.edu) for assistance.

Option Button Settings

When selecting the option button under the SMART VIEW tab, a pop-up box will appear with certain settings to choose from.

Under the "Member Options", make sure the zoom in level is "Next Level". Otherwise you have the chance of seeing more or less information than desired.

Option Button Settings (cont.)

Under "Data Options", make sure the "No Data / Missing" is selected under the Suppress Rows sections.

Under "Advanced", always be sure the Shared Connections URL does not change after setting up SmartView.

Option Button Settings (cont.)

The "Formatting" section should appear as below:

Option Button Settings (cont.)

If there are ever issues with the color formatting, simply go to the "Cell Styles" section, select the "Default Styles" drop down box, and then "Common". This should return things to normal.
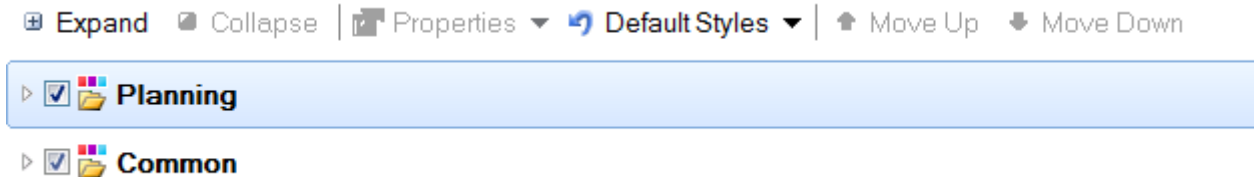
Button Descriptions – PLANNING AD HOC
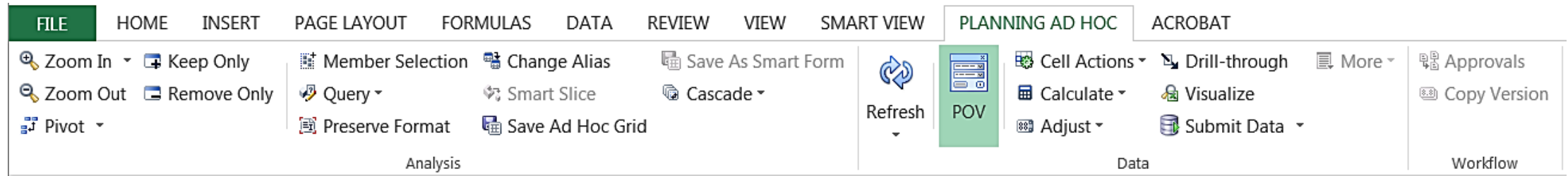
🔍 Zoom In ▾	Allows the user zoom in to the default zoom level.
🔍 Zoom Out	Allows the user to collapse the view based on the default zoom level.
Keep Only	Keeps the currently selected members.
Remove Only	Removes the currently selected members. Can select multiple members.
Pivot ▾	Pivots a dimension or member between rows and columns.
Member Selection	Opens a window to select members applicable for the user variable (applies to active cell). See Mapping pg. 16.
Preserve Format	Applies Smart View formatting selections to cells created by zooming in.
Change Alias	Choose between the descriptive alias or nothing.
Cascade ▾	Generates multiple sheets or workbooks at the next level down.
Refresh	Select this when opening SmartView to allow the user to sign-in and begin working with the document. After signing in, it is used for retrieving and refreshing the data when changing the criteria.

Button Descriptions – PLANNING AD HOC (cont.)
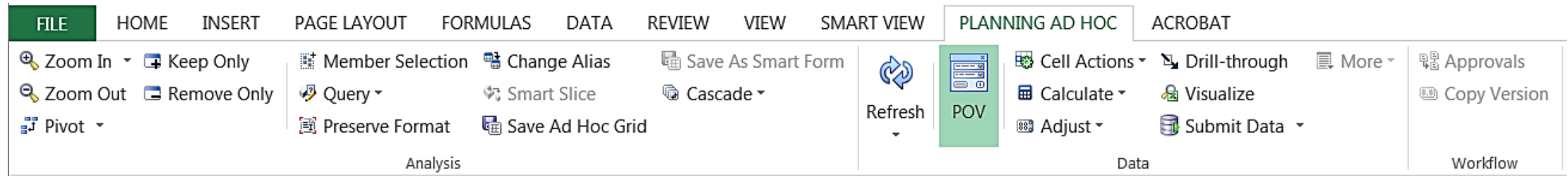
POV — Stands for 'Point Of View'. This can be locked at the top of the screen or moved in a box anywhere on the page. This is where fixed members can be parked.

Drill-through — Takes you to the general ledger.

Visualize — Allows the user to see the information on an Excel grid.

Submit Data — Only applicable during budget development. Saves data to the system.

Button Descriptions – SMART VIEW
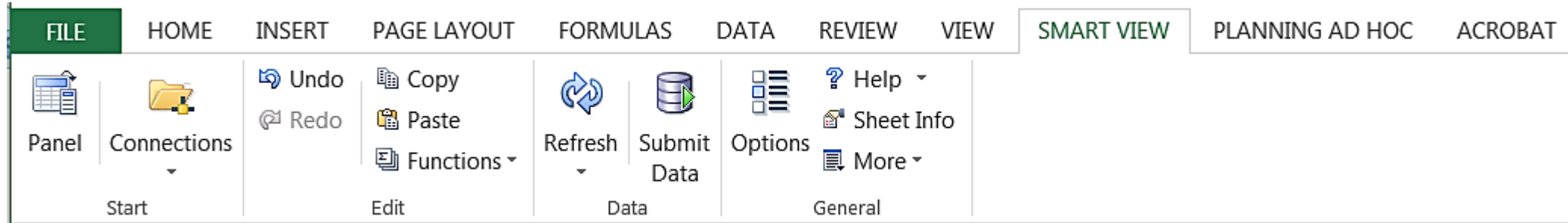
| | Opens a panel on the right side of the screen where you can view task lists, document contents, and more. |
| Panel | |

| | Shows which servers you are connecting to. |
| Connections | |

Undo	Allows the user to undo a step in SmartView. This is different from the normal Undo button.
Redo	Allows the user to redo a step in SmartView. This is different from the normal Redo button.
Copy	Copies a selected portion of SmartView content.
Paste	Pastes the copied portion of SmartView content.
Functions	Allows the user to create or manage functions using the Build Function or POV Manager options.

Button Descriptions – SMART VIEW (cont.)

| FILE | HOME | INSERT | PAGE LAYOUT | FORMULAS | DATA | REVIEW | VIEW | SMART VIEW | PLANNING AD HOC | ACROBAT |

Panel Connections | Undo Copy | Refresh Submit Data | Options | Help Sheet Info
| Redo Paste | | | More
| Functions |

Start | Edit | Data | General

Select this when opening SmartView to allow the user to sign-in and begin working with the document. After signing in, it is used for retrieving and refreshing the data when changing the criteria.

Refresh

Only applicable during budget development. Saves data to the system.

Submit Data

Where the setting for SmartView are located.

Options

Button Descriptions – SMART VIEW (cont.)
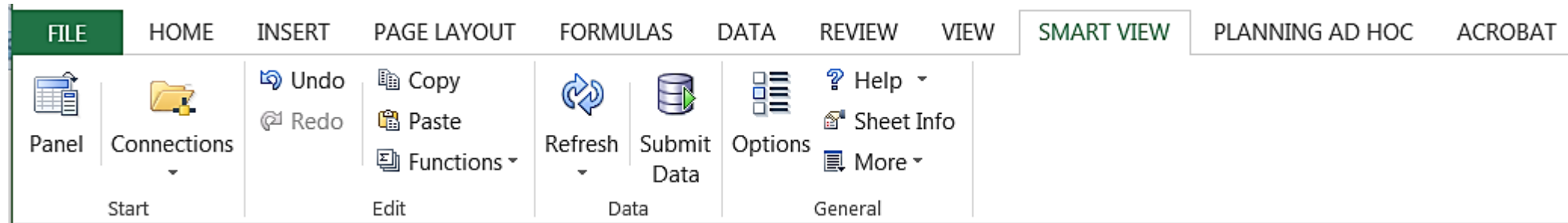
Help — Gives a help menu if you need assistance on a task.

Sheet Info — Allows the user to see connections and other information about their open worksheet.

More — Gives different options for migrating workbooks, importing metadata, or inserting a connections list.

Manipulating Data

When first opening SmartView, select "Refresh". A sign-in pop-up box will appear. After signing in, the user will have access to manipulate the data as they choose.
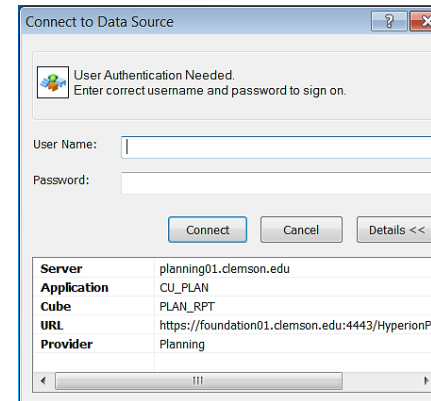
As the workbook is opened, the data will appear the way the workbook is set up. The sample below begins with everything set at the top level.

	A	B	C	D	E	F	G	H
1							FY16	FY16
2							Total Budget	Actual
3							Final	Final
4							Total Ledger	Total Ledger
5							YearTotal	YearTotal
6	FD_ALL	DP_ALL	AC_ALL	CL_ALL	PG_ALL	PJ_ALL	(615,640,051.11)	7,156,839.00

Manipulating Data (cont.)

There are multiple way to manipulate the data to find what you want.

a) The first is by selecting the cell and typing it in. However, what is typed must match exactly what is in the system. If not, an error message will appear.
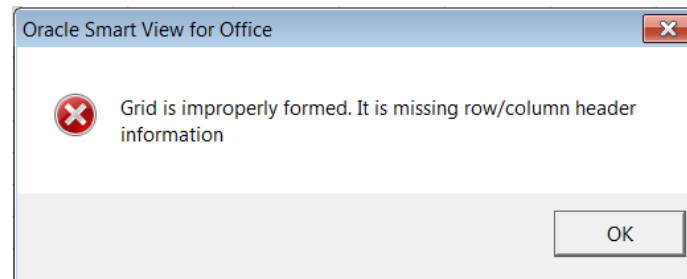
b) The second way is by selecting the "Zoom In" or "Zoom Out" under the PLANNING AD HOC tab. This will allow the you to zoom in or out on members in the grid to display data for their children and descendants.

Manipulating Data (cont.)

FD_ALL	DP_BPA	AC_ALL	CL_ALL	PG_ALL	PJ_ALL

c) A third way is by double clicking on the cells. If you desire to see all funds for a certain department that has already been selected, such as the example above, then simply double-click "FD_ALL". As seen below, the "FD_ALL" has zoomed down to the next level.

	A	B	C	D	E	F	G	H
1							FY16	FY16
2							Total Budget	Actual
3							Final	Final
4							Total Ledger	Total Ledger
5							YearTotal	YearTotal
6	FD_CUF	DP_BPA	AC_ALL	CL_ALL	PG_ALL	PJ_ALL	(68,720.46)	(5,492.98)
7	FD_CUFFU	DP_BPA	AC_ALL	CL_ALL	PG_ALL	PJ_ALL	(201,199.44)	(458,883.12)
8	FD_CUFND	DP_BPA	AC_ALL	CL_ALL	PG_ALL	PJ_ALL	(26,463,034.36)	(26,221,941.09)
9	FD_CURF	DP_BPA	AC_ALL	CL_ALL	PG_ALL	PJ_ALL	(1.00)	35,374.15

Manipulating Data (cont.)

If viewing the funds for a certain department is not desired and instead the account is, then simply select the "Undo" button under the SMART VIEW tab. After doing this it will take you back and you can double-click "AC_ALL".

	A	B	C	D	E	F	G	H
1							FY16	FY16
2							Total Budget	Actual
3							Final	Final
4							Total Ledger	Total Ledger
5							YearTotal	YearTotal
6	FD_ALL	DP_BPA	AC_REV	CL_ALL	PG_ALL	PJ_ALL	18,283,244.85	14,833,129.74
7	FD_ALL	DP_BPA	AC_ALLEXP	CL_ALL	PG_ALL	PJ_ALL	45,016,200.11	41,484,072.78

Note: Performing an Undo after modifying member data returns the sheet to its state before the last refresh, not to its state before the data modification.

Manipulating Data (cont.)

If you only want the revenue accounts, then highlight the cell and select "Keep Only" from the PLANNING AD HOC tab. Another way you could do this is by highlighting "AC_ALLEXP" and selecting "Remove Only" from the PLANNING AD HOC tab.

	A	B	C	D	E	F	G	H	I
1							FY16	FY16	FY15
2							Total Budget	Actual	Total Budget
3							Final	Final	Final
4							Total Ledger	Total Ledger	Total Ledger
5							YearTotal	YearTotal	YearTotal
6	FD_ALL	DP_BPA	AC_REV	CL_ALL	PG_ALL	PJ_ALL	18,283,244.85	14,833,129.74	19,977,067.75

It is important to note that when using the "Keep Only" and "Remove Only" buttons that they will keep or remove the cells that are identical as well. In the last example, if we selected DP_BPA, instead of AC_ALL, and clicked "Keep Only", then nothing would change due to both lines containing this department.

Manipulating Data (cont.)

If you want to view a fiscal year other than the one listed, simply copy the header lines and paste them adjacent to those already in place. Type the fiscal year desired in the cell and click "Refresh".

	A	B	C	D	E	F	G	H	I
1							FY16	FY16	FY15
2							Total Budget	Actual	Total Budget
3							Final	Final	Final
4							Total Ledger	Total Ledger	Total Ledger
5							YearTotal	YearTotal	YearTotal
6	FD_ALL	DP_BPA	AC_REV	CL_ALL	PG_ALL	PJ_ALL	18,283,244.85	14,833,129.74	19,977,067.75

Sample Hierarchy

Fund
- FD_ALL
  - FD_CUF
  - FD_CECCC
  - FD_CRFC
  - FD_CUFFU
  - FD_CUFND
  - FD_CULSF
  - FD_95
  - FD_CURF
  - FD_FCAF
  - FD_LICAM
  - FD_LICAR
  - FD_NDPN
  - FD_IPTAY
- FD_Fund List
  - FD_Unrestricted
  - FD_Restricted
  - FD_CU Foundation
  - FD_Plant
  - FD_CU Endowments
  - FD_CU Research Foundation
  - FD_Related Orgs
  - FD_Other

Account
- AC_ALL
  - UNMAPPED_ACCOUNTS
  - AC_REV
  - AC_ALLEXP
- AC_BD_Budget Document
  - AC_BD_Expense
  - AC_BD_Revenue

Entity
- Total Entity
  - DP_ALL
    - DP_A+A
    - DP_AAH
    - DP_ATH
    - DP_BPA
    - DP_CAFLS
    - DP_CAMP
    - DP_CAPDS
    - DP_CES
    - DP_COES
    - DP_CURF
    - DP_DAPS
    - DP_DCIT
    - DP_ECDEV
    - DP_FAC
    - DP_FIN
    - DP_HEHD
    - DP_LBRY
    - DP_PRES
    - DP_PROV
    - DP_PSAG
    - DP_RES
    - DP_SEC

Program
- PG_ALL_PROGRAMS_2000_07_01
  - PG_ALL
    - PG_PLAN
    - UNMAPPED_PROGRAM
    - PG_ACDEM
    - PG_AUXIL
    - PG_INSSP
    - PG_INSTR
    - PG_NONEX
    - PG_OPMAN
    - PG_PUBSV
    - PG_RESCH
    - PG_SCHOL
    - PG_STUSV

Class
- CL_ALL
  - CL_ALLOC
  - CL_AUXFB
  - CL_DEFLT
  - CL_E&GFB
  - CL_EGAPP
  - CL_FAADM
  - CL_FEDAP
  - CL_FEDGC
  - CL_GADRV
  - CL_GIFTS
  - CL_HOLDB
  - CL_INVST
  - CL_LOANS
  - CL_LOCGC
  - CL_OTHER
  - CL_PLANT
  - CL_PRICG
  - CL_PSAFB
  - CL_PSAPP
  - CL_SALES
  - CL_SCHOL
  - CL_STAGC
  - CL_STFEE
- CL_FB_CLass List
  - CL_FB_Non Fund Balance
  - CL_FB_Fund Balance

Project
- PJ_ALL
  - PJ_09
  - PJ_10
  - PJ_11
  - PJ_12
  - PJ_13
  - PJ_14
  - PJ_15
  - PJ_16
  - PJ_17
  - PJ_18
  - PJ_19
  - PJ_20
  - PJ_21
  - PJ_22
  - PJ_23
  - PJ_29
  - PJ_30
  - PJ_31
  - PJ_32
  - PJ_33
  - PJ_34
  - PJ_35
  - PJ_40
  - PJ_41
  - PJ_42
  - PJ_49
  - PJ_50
  - PJ_51
  - PJ_52
  - PJ_53
  - PJ_55

***These can be seen under the PLANNING AD HOC tab by selecting "Member Selection"