

Using Smart View for budget DATA Entry

The following steps and screen shots are for Smart View using Excel 2016.

Smart View is an Excel add-in that allows an end-user to open Hyperion Forms or Reports directly in Excel. Any right click options available within Hyperion are also available within Smart View. The most common way to utilize Smart View is to open forms and enter budget data from Excel. This is an ideal situation for those comfortable with Excel functions.

This is an option to make budget entry easier by sharing the form in an excel spreadsheet format with an end user. Give very detailed instructions to ONLY key data and not make any formatting changes to the spreadsheet, save it as an excel spreadsheet with their data and email back to you.

After you receive the spreadsheet, you will need to look it over carefully and make sure nothing moved or changed on the original spreadsheet. Then you can hit the submit button from the Smart View Tab and the data will be loaded directly to Essbase/Hyperion. You will not have to rekey any of the numbers.

Validate this by opening Hyperion and checking a few key cells for the update from the spreadsheet submission.

When you use Smart View to enter budgets there are some Do's and Don'ts to keep in mind.

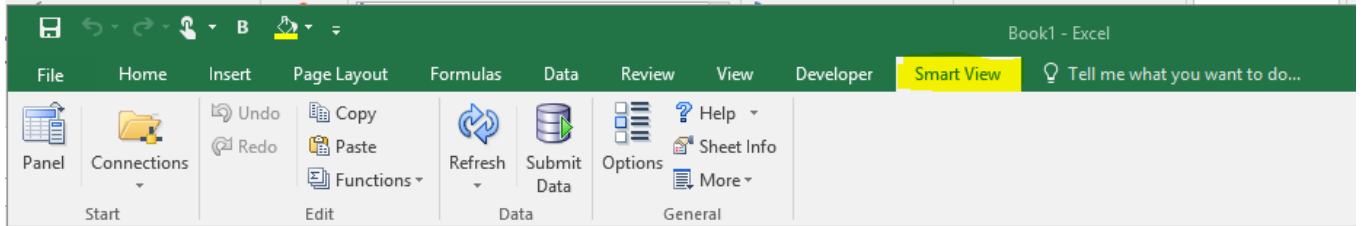
DO's

- Follow the instructions as written.
- Only areas with Hyperion Security Access will be updated with the Submit button
- Use of Smart View can reduce the fetching delays sometimes encountered within the Hyperion Application.
- When sharing the Smart View spreadsheet with an end-user, be sure that the POV is set to the correct combination/Entity for their security access.
- Before you hit SUBMIT, it is imperative that you are fully aware and confident that what you are about to do is accurate and correct.

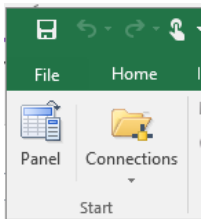
Don't

- When a form is opened using Smart View within Excel, it is critical to the functionality of the Form that no Cells/Rows/Columns are removed, added, or changed. If any change is made to the design/structure of the Form within the default Excel Sheet, functionality could be impacted. Data Submissions could become corrupt and data could post in areas not anticipated within Hyperion.
- AD HOC forms are for administrative access only.
- Sort/Filter within Smart View is a known bug logged with Oracle. (Sort/Filter functions within the Hyperion Application only.)
- Any cosmetic changes or additions of rows, calculations should not be done in the Sheet 1 of the Smart View form.

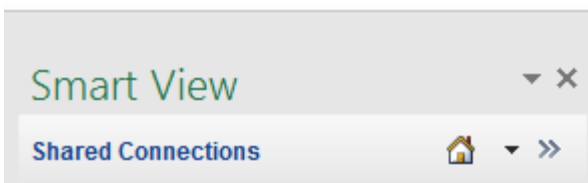
1. Open Excel
2. Click on the Smart View Menu item. (NOTE: If you do not have this option, then the Add-in is either disabled and you need to enable it OR Smart View is not installed. Follow installation instructions here: https://it-training.missouri.edu/hyperion/SmartViewReporting_QuickReferenceGuides/InstallingSmartView_QuickReference.pdf (You will need to login, when prompted, to get to the instructions.)



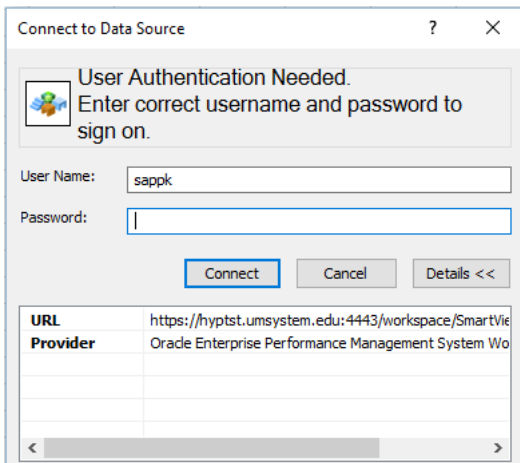
3. Click on the Panel icon



4. Click on the Shared Connections option that should now appear on the right side of the window.



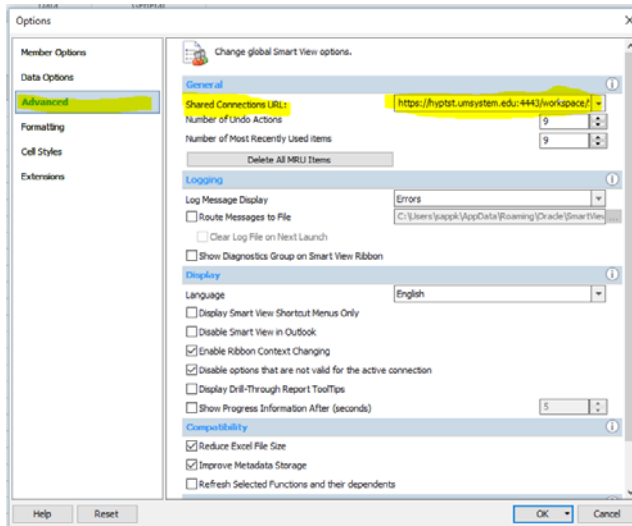
5. Connect to Data Source entry window should appear.



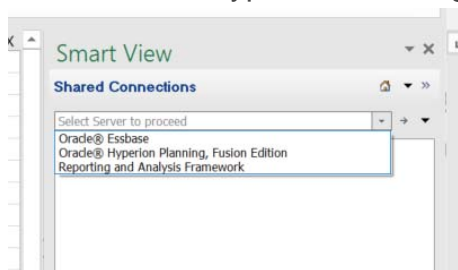
6. Enter your User Name and Password in the appropriate blanks and verify the URL is pointing to the appropriate Hyperion Environment.
 - a. <https://hyptst.umssystem.edu:4443/workspace/SmartViewProviders> for TEST
 - b. <https://hyprd.umssystem.edu:4443/workspace/SmartViewProviders> for PRODUCTION

NOTE: If the wrong path appears in the Connect to Data Source Window, do the following steps and enter the correct path in the Options.

- Click on Options in the Smart View Ribbon.
- Click on Advanced in the left selection pane
- Type or paste the correct path in the Shared Connections URL: area.

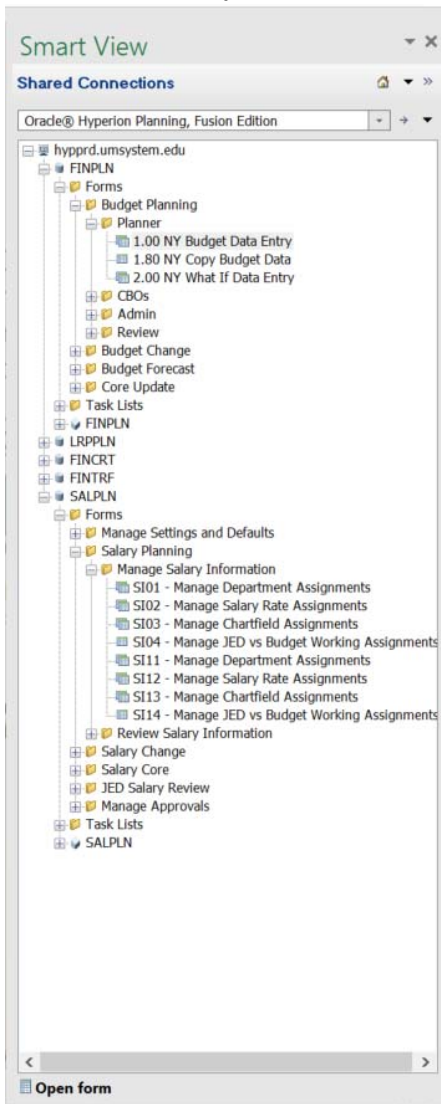


7. Click the down arrow to the right of the Select Server to proceed selection box.
8. Select Oracle Hyperion Planning, Fusion Edition



- Then expand by clicking on the + signs until you are at the Form you want to open within Excel. (Open the form by double clicking on the form you want to open or single click to select it and then click on Open form at the bottom of the panel.

NOTE: This step could take a little while depending on how many records are loaded.



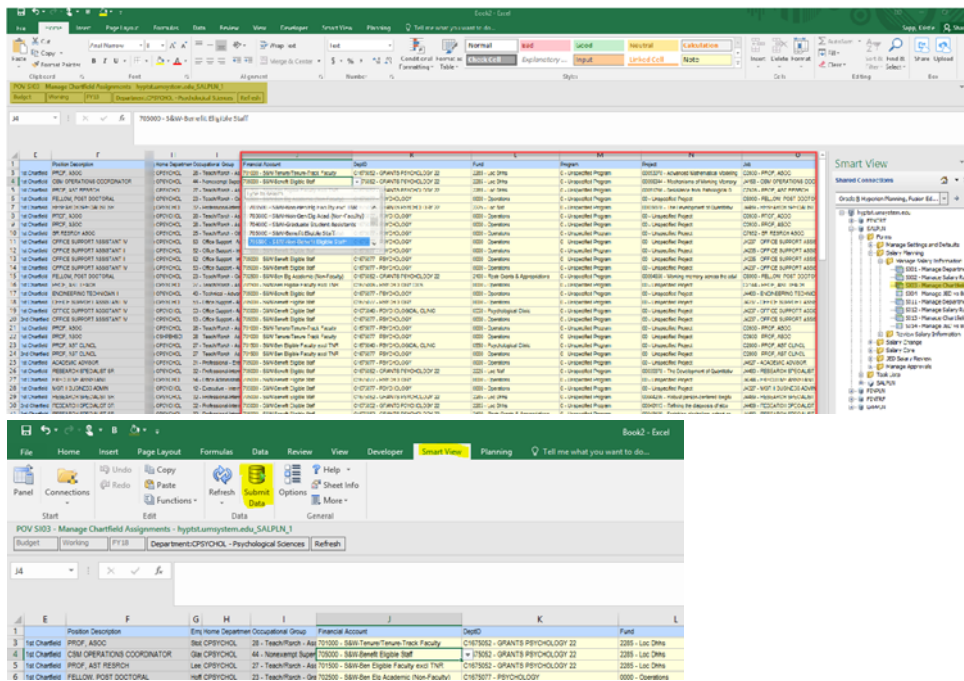
- The Form will then Open in Excel and the cells where you can enter data will appear white and you can type numbers directly in those cells.
- The POV at the top of the sheet can be changed to the appropriate combination you need.
- After you are sure you have entered all of the appropriate budget numbers, you can click the Submit button on the Smart View Ribbon at the top.

NOTE: Do NOT add/delete/move any row/cell etc. from the excel sheet if you plan to SUBMIT data from this form.

If you plan to change the look of the Sheet in any way...LINK to this tab from another TAB and format and change from there. Only submit from the original Sheet.

One way to use this option is to get the POV set and save the Excel Sheet as a regular document.

- 13. You then can email it to the appropriate end user. They do NOT need to have Hyperion Access. They can enter their numbers and save the document with those changes and email it back to you. NOTE: They can change nothing else. Just key in numbers.
- 14. You open that spreadsheet up, verify nothing but the numbers have changed, connect to Hyperion through the Smart View Panel and then hit the Submit button. Those numbers will now appear in Hyperion.
- 15. Open Hyperion and check to see that the numbers uploaded correctly.
- 16. This screen shot is of the SI03 – Manage Chatfield Assignments
 - a. The default Entity will be the Entity you had selected within Hyperion the last time you exited.
 - b. If you are not at a zero level, you may get an error message because the file is too large to load.
 - c. Once the form loads, all Hyperion options are available thru the right click option.
 - d. Drop down selection menus are also available through Smart View as seen below.
 - e. An end user will not be able to use the submit button (located on both the Smart View tab and the Planning Tab unless they have Smart View installed.)
 - f. Only the person requesting the numbers will do the submitting of the data.



- 17. Once you have submitted the numbers and are satisfied with the submission. You may want to Save this document for future reference. Do this function with the Excel Save functionality. File=>Save As=>Browse to the appropriate folder location=>Give the file a name=>Click Save at the bottom of the window.
- 18. To properly Exit from the Smart View Submission ability and disconnect from Hyperion, Click on the Down Arrow to the right of the House Icon in the Smart View Panel.
- 19. Select Disconnect All from the drop down selections.