



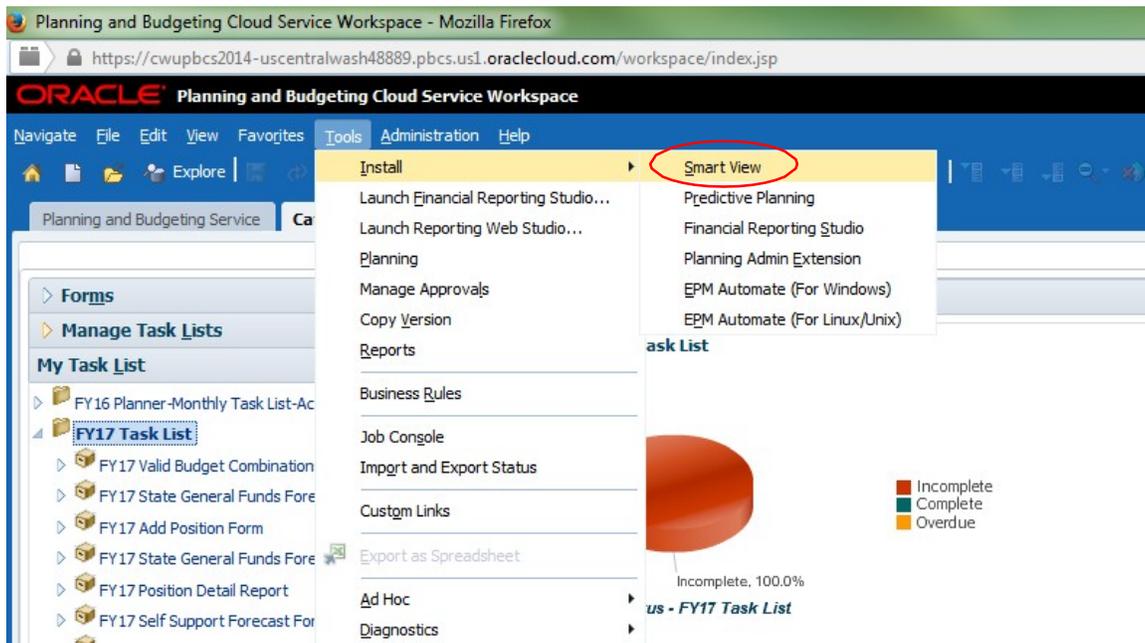
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## Smart View Setup

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## Installing Smart View

1. Log into CatPlan
2. Select Tools / Install / Smart View



3. An Oracle webpage will appear
4. Click on the grey box in the center of your screen that says “Download Latest Version”

[Download Latest Version](#)

5. You will be directed to a new page. Select the radio button to accept the license agreement
6. Click the red box that says “Download Now”

## Oracle Smart View for Office

Download the latest version of Oracle Smart View for Office

Thank you for accepting the OTN License Agreement; you may now download the software by clicking on the Download Now button below.

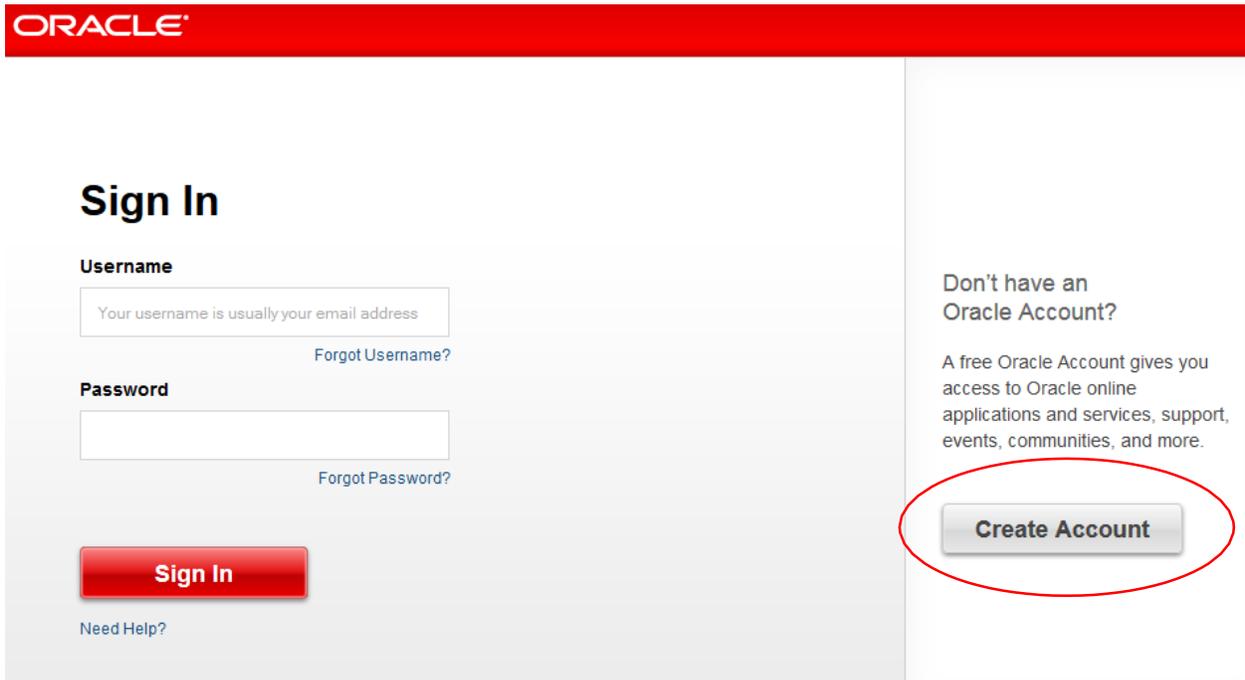
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[How do I check what version of Microsoft Office I have installed?](#)

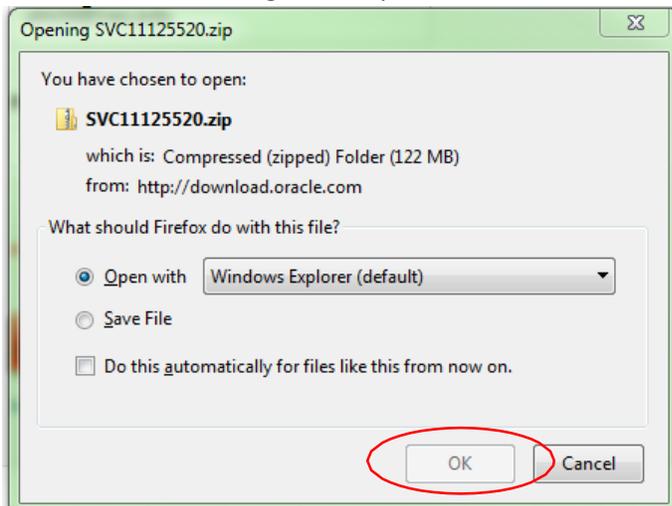
If you need another version please visit [Oracle Support](#) or [Oracle Software D](#)

[Click here](#) if you would like to download Smart View extensions and utilities.

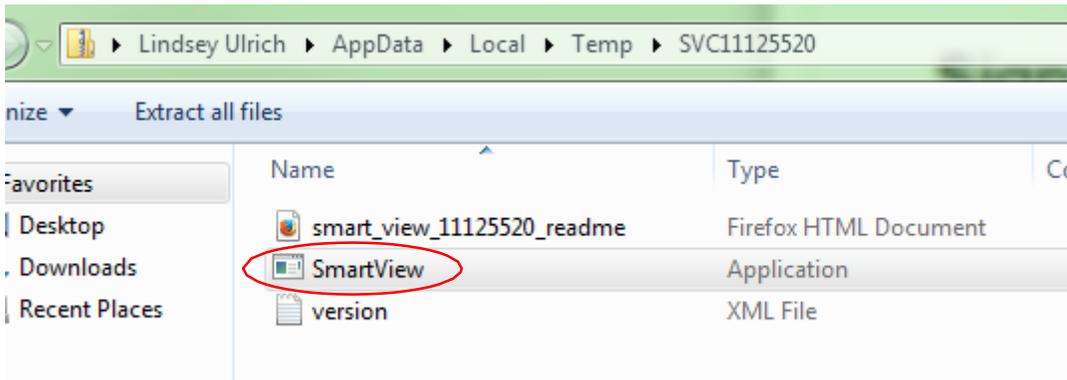
7. You will be brought to a sign in page. This is where it gets tricky. **Important if you have not created an account yet through this SmartView download method, you need to create a new account. For some reason the Smartview Oracle account is separate from your Oracle Hyperion "CatPlan" account. More likely than not, you need to click the box to the right that says "Create Account."** When I created mine, I made it match all my other Oracle stuff so I didn't need to remember new username or passwords.



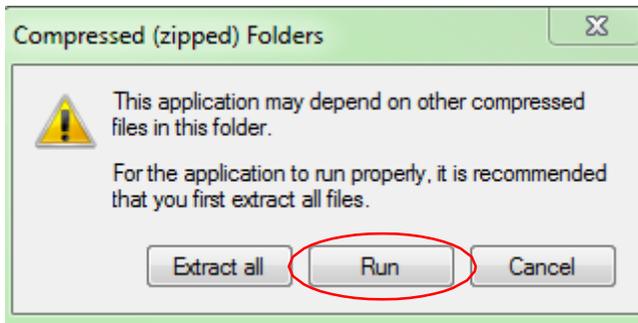
8. When the below dialogue box opens click "OK"



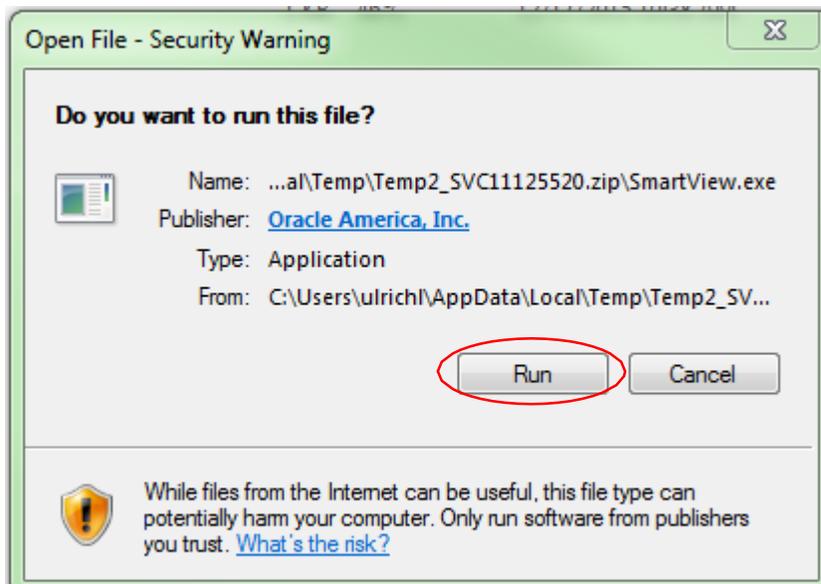
- Another box should automatically appear, if not, navigate to your download folder to find the download.
- Double click on the SmartView application within the folder



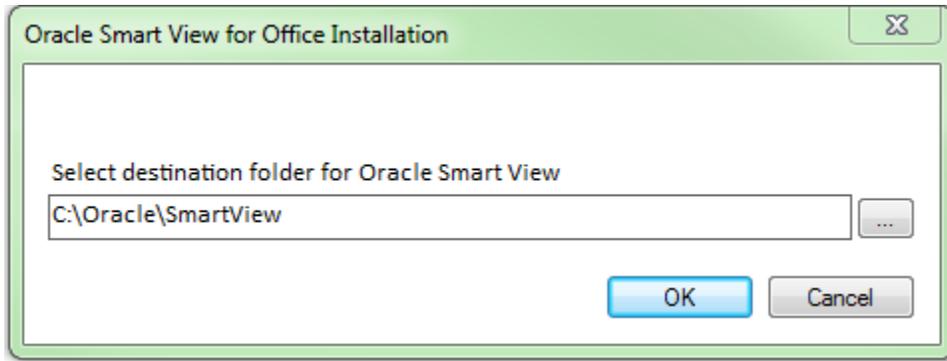
- When prompt box appear, click "Run"



- Another run prompt will appear, click "Run" again

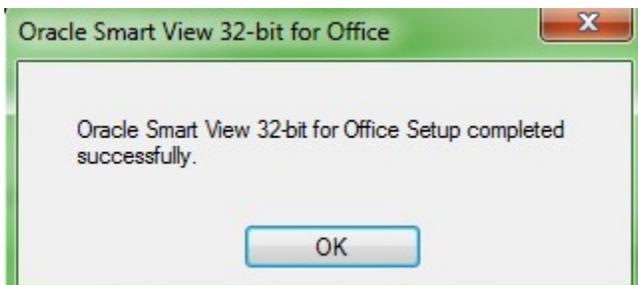


13. The destination box will appear, click “OK”



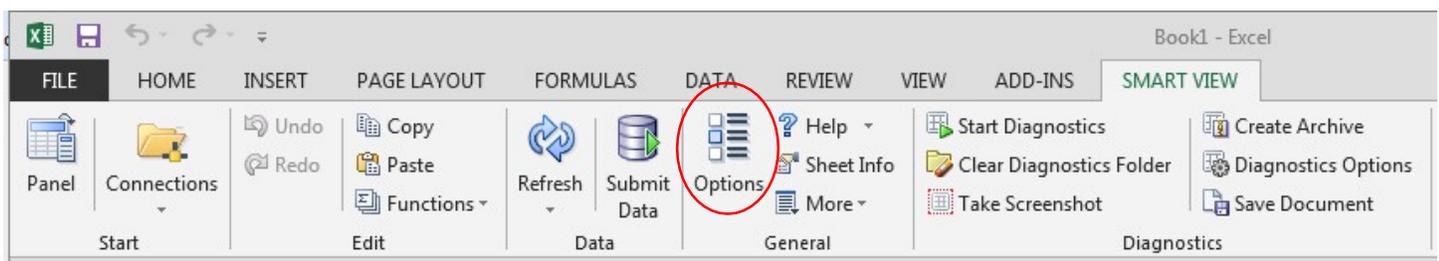
14. Make sure all of your Microsoft Office application are closed

15. Once SmartView is done installing, you will receive a successful install notice, click “OK”

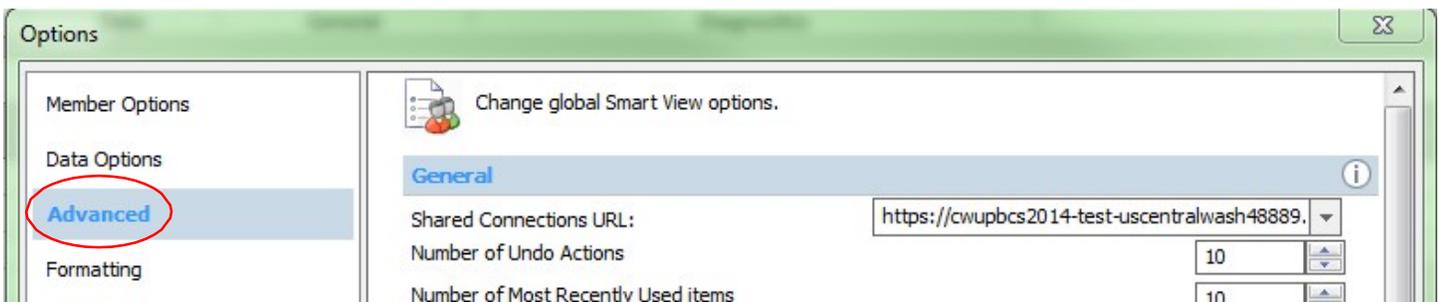


## Open Connection in Excel

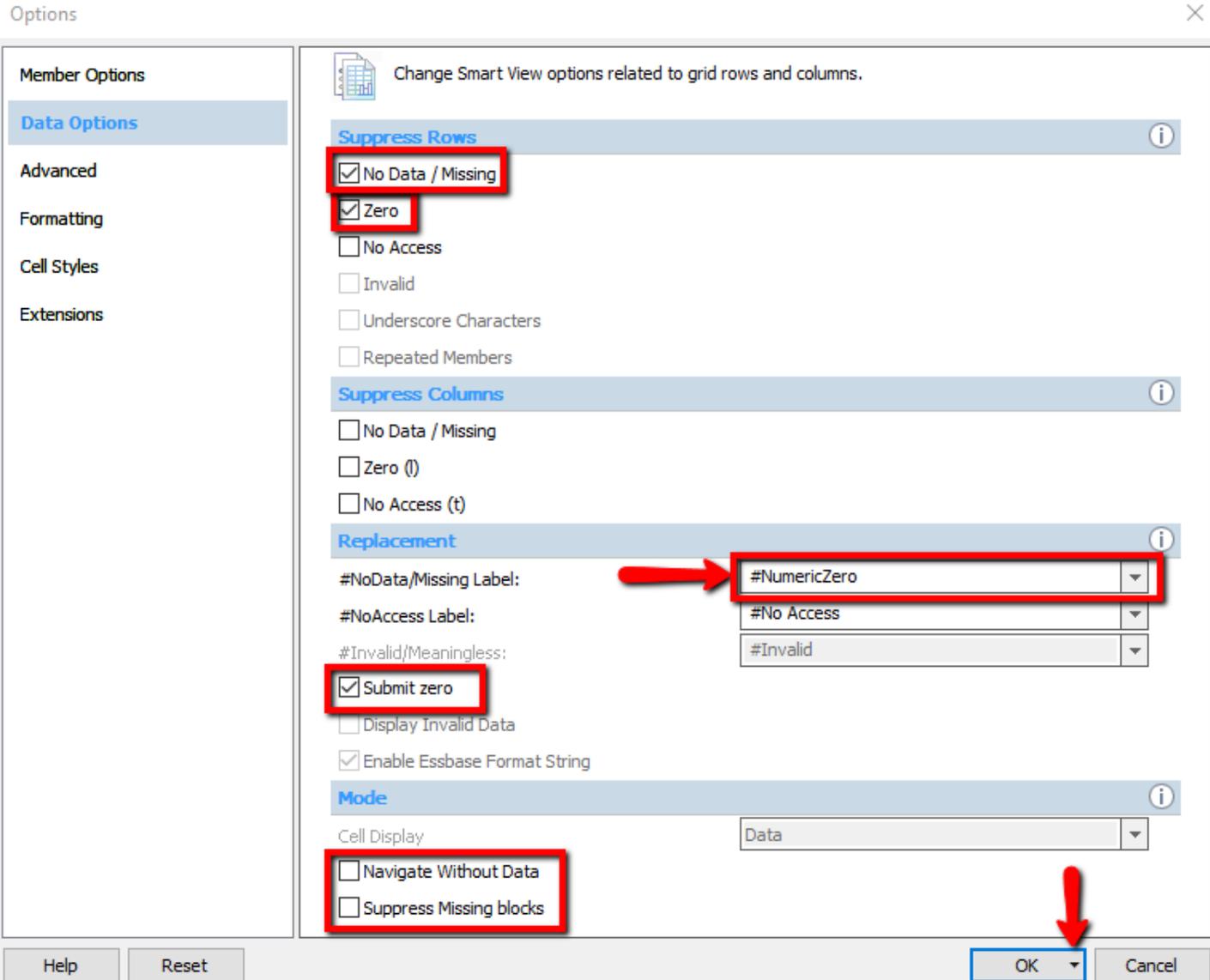
1. Open a blank Excel workbook
2. You should now see a Smart View Tab across the top
3. Click on the Smart View tab
4. Click “Options”



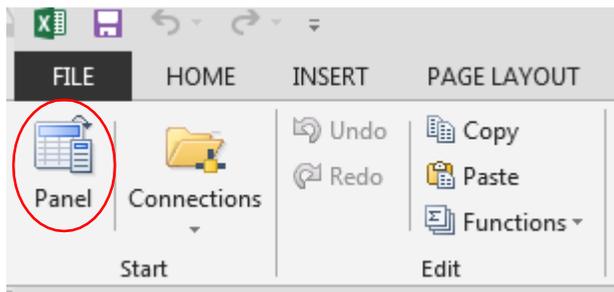
5. In the dialogue box, click the Advanced menu



- Copy the below web address and paste it into the Shared Connections URL box  
<https://cwupbcs2014-uscentralwash48889.pbc.us1.oraclecloud.com/workspace/SmartViewProviders>
- Click the Data Options menu. Set the menu options to match this screen. After the options are set, select the drop down menu on the ok button, and select "Save as default options"



- In the menu, click "Panel"

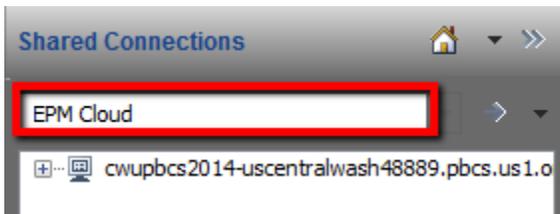


- In the open panel to the right, click on "Shared Connections"

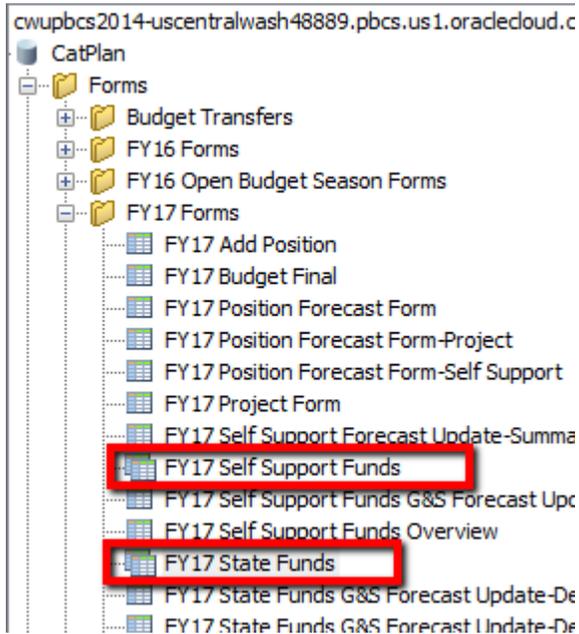


10. On the bottom of the panel, unselect the “Display on Startup” button.

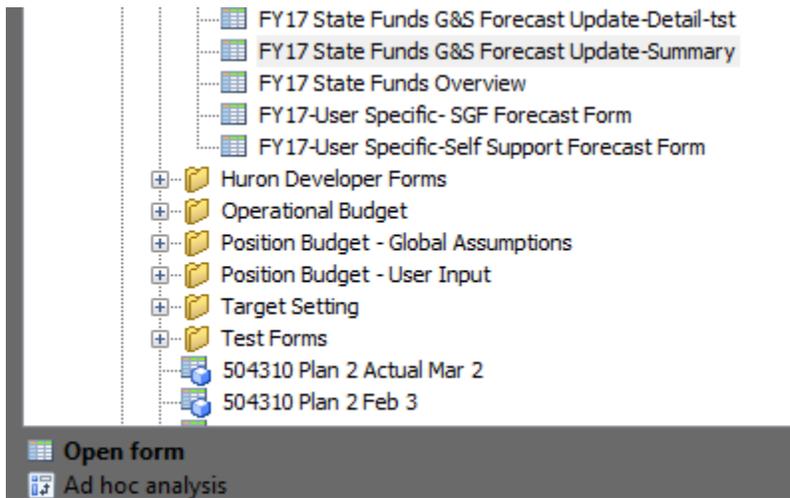
11. In the dropdown menu select “EPM Cloud”



12. Click on the plus button until you are in the FY17 forms folder, then select the form you would like to open. The forms in the tasklists in CatPlan are shown below.



13. Select “Open Form” at the bottom of the SmartView Panel



14. The form will now be open in SmartView

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1		TotalYear	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total Year	Total Year
2		Working	Final	Final	Final	Working	Actuals + I	Variance								
3		Budget	Actual	Actual	Actual	Forecast - \	Budget to									
4		FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	Actual - Fir	Actuals + Fc
5	5075-CWU	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	5140-CWU	94191	4146	5718	5430	5699	5699	5699	5699	5699	6265	6265	6265	6265	68848	25343
7	5175-CWU	516299	43675	44606	44606	45103	45103	45103	45103	45103	45103	45103	45103	45103	538813	-22515
8	526-CWU:	480	480	0	0	0	0	0	0	0	0	0	0	0	480	0
9	560-CWU:	244791	17581	16780	15039	15451	15451	15451	15451	15636	15636	15636	15636	15636	189383	55408
13	+5275-CW	3478	228	199	191	409	409	409	409	409	409	409	0	0	3478	0
19	+5350-CW	1883	29	26	28	200	200	200	200	200	200	200	200	200	1883	0
22	+5400-CW	9199	0	0	0	1022	1022	1022	1022	1022	1022	1022	1022	1023	9199	0
24	+5450-CW	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26	+5500-CW	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
29	+5650-CW	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	50100: Bud	0	0	0	0	800	800	0	1000	800	1200	1200	400	0	6200	-6200
79	+50: CWU-	870320	66139	67329	65293	68684	68684	67884	68884	68868	69834	69834	68625	68226	818284	52036
80																

### SmartView Tips & Tricks

15. After submitting data, click the refresh button. The refresh button pulls data from CatPlan into SmartView. If the number that you put in doesn't change, then the data was submitted successfully. You can also pull up the same form in CatPlan and validate the results until you are comfortable with SmartView.
16. SmartView allows you to work in CatPlan, with the benefits of Excel. You can copy and paste data into multiple cells at a time, allowing you much quicker data entry.

17. If you see a plus next to the name of one of the row or column headers, you can expand that dimension to a lower level. For example, to drill down to the 5-digit account code, you would double click the 5450 row.
18. In order to input data into SmartView, you have to be at the lowest level for all dimensions. For example, since I selected ALL\_PROGRAMS in the point of view in the example above, I will not be able to enter data. I would need to select the actual Program in order to input data.
19. SmartView will change colors when you have reached the bottom level and are able to input data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
	TotalYear	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Tot	
	Working	Final	Final	Final	Working	Act									
	Budget	Actual	Actual	Actual	Forecast	For									
	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	FY17	Act	
5075-CWU	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
5175-CWU	509	509	0	0	0	0	0	0	0	0	0	0	0	0	
560-CWU:	234	234	0	0	0	0	0	0	0	0	0	0	0	0	
+5350-CW	-235	0	0	-235	0	0	0	0	0	0	0	0	0	0	
53349:Re	0	0	0	-2999	0	0	0	0	0	0	0	0	0	0	
50160:Bu	-2999	0	0	0	0	0	0	0	0	0	0	0	0	0	
-5400-CW	-2999	0	0	-2999	0	0	0	0	0	0	0	0	0	0	
+5450-CW	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
+5500-CW	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
+5650-CW	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

20. When you input data, but haven't submitted it, it will turn the cell into a different color. If you refresh SmartView, the data will not be submitted.
21. To put in a comment, you can click the cell(s) that you would like to put the comment in, then select the "Cell Actions" Button on the planning ribbon. When you click the comments button, a pop up menu will show. Select the button with the green arrow to add a comment. If you want the comment to go in multiple fields, select the "Apply to all selected cells" Button. Then, select the save button. Once you save, the comment is in the cell. You do not need to submit the data.

The screenshot shows the Oracle SmartView interface. The ribbon includes 'Cell Actions', 'Adjust', 'Predict', 'Save', 'Approvals', 'Lock', 'Drill-through', 'More', 'Clear', 'Copy Version', 'Calculate', and 'Submit Data'. The spreadsheet displays financial data for various account codes. A 'Comments' dialog box is open, showing the selected cell 'K13 - 50160:Budget - Rentals/Leases, Mar, Working, F'. The dialog box contains a text area for the comment, a 'User' field, and a 'Date Entered' field. The 'Apply to all selected cells' button is highlighted in red.