

## Oracle Hyperion Smart View for Office

Duration – 1 day

### Why Smart View Training?

Oracle Hyperion Smart View for Office (Smart View) provides a common Microsoft Office interface designed specifically for HFM, Planning, Essbase and Oracle BI users. Using Smart View, you can view, import, manipulate, distribute and share data in Microsoft Excel, Word and PowerPoint interfaces. It is a comprehensive tool for accessing and integrating Hyperion and BI content from Microsoft Office products.

The power and flexibility of Smart View will take your Hyperion deployment to the next level but we find that most companies do not utilise Smart View well, many still rely on the Essbase add in. This course will give you the knowledge and skills to set about changing this.

### What you will learn

This hands on course covers all aspects of Smart View for Hyperion Planning, Essbase and Financial Management users. At the completion of the course students will have a complete understanding of the full functionality of Smart View including access to all of our tips and tricks.

### Who should attend?

Hyperion Planning, Financial Management & Essbase Users, Business Analysts, Business Intelligence Developers, Business Managers

### Prerequisites

Basic Microsoft Office skills

### Topics Covered?

#### Introduction

- Overview of what Smart View is and what it does
- Essbase add in vs. Smart View, why it's time to change
- Dimensional modelling basics
- Installation and technical overview
- Connection Manager
- Office 2003 vs. office 2007

#### Connecting to Essbase

- The basics
  - Performing ad hoc analysis on an Essbase source
  - Selecting a member or group of members
  - Pivoting dimensions between rows, columns and the point of view
  - Drilling down and up using the zoom feature
  - Walk through the extensive list of options defining what every item controls
- Managing Alias tables
- Excel formatting and Smart View

- Adding formulas and converting your ad hoc grid into a report
- Leveraging the power of Smart slices (v11 only)
- Using function builder to create flexible reports (HsGetValue and more)
- Cascade feature allowing multiple sheets

### Connecting to Hyperion Planning

- Why excel instead of the web browser?
- Working with data entry forms in excel
  - Opening data forms in excel
  - Submitting data from excel
  - Leveraging the features of planning such as cell text, supporting detail and smartlists

### Connecting to HFM

- The basics
  - Connecting to HFM
  - Selecting a member or group of members
  - Pivoting dimensions between rows, columns and the point of view
  - Drilling down and up using the zoom feature
  - Walk through the extensive list of options defining what every item controls
- Using function builder to create flexible reports (HsGetValue and more)

### Creating refreshable reports in word and PowerPoint

- Copying and pasting live data into word and PowerPoint
  - Why copy and paste live data into word and PowerPoint
  - Copy and paste data points from excel into word or PowerPoint
  - Using the POV manager to refresh

### Tips and tricks

- Series of tips and tricks focused on optimising your experience, these include
  - Defining default Alias connection for Essbase connections
  - Automatically jumping from data entry forms in the web browser to excel equivalent

### When not to use Smart View

The practical application of Smart View in the workplace – just because you've got it doesn't mean you should use it for everything.

### What's next for Smart View? We take a look at v11.1.2 and beyond

- The opportunity to test drive our v11.1.2 environment including
  - Parity with web browser for Hyperion Planning users
  - New and improved Office 2007 integration

