



UMHS Financial Systems Workspace & Smart View Templates

ORACLE® Enterprise Performance Management System Workspace, Fusion Edition

File

Log On



User Name:

tdepries

Password:

Log On



ORACLE®
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

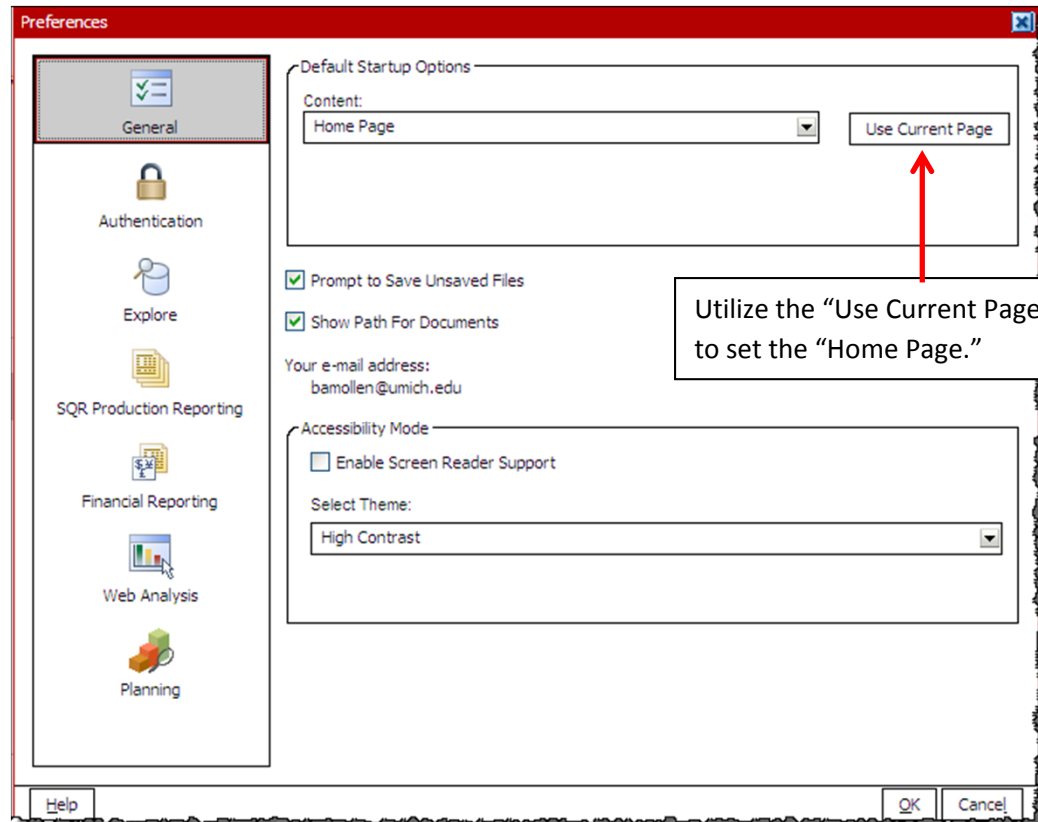
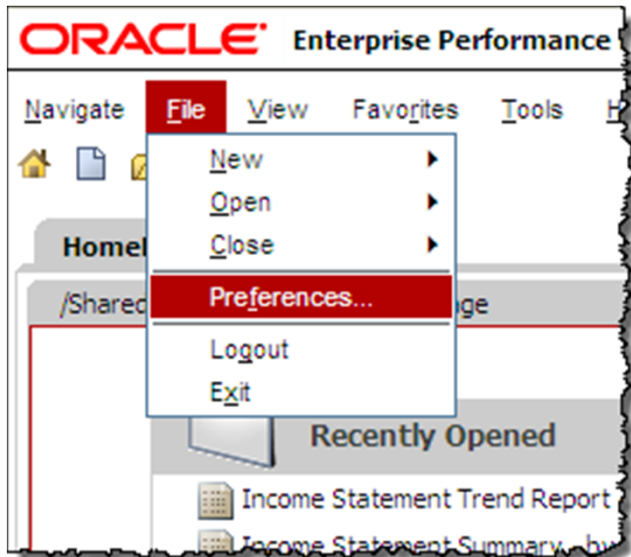
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<https://findatamgr.dsc.umich.edu/workspace/index.jsp>



UMHS Financial Systems Workspace & Smart View Templates

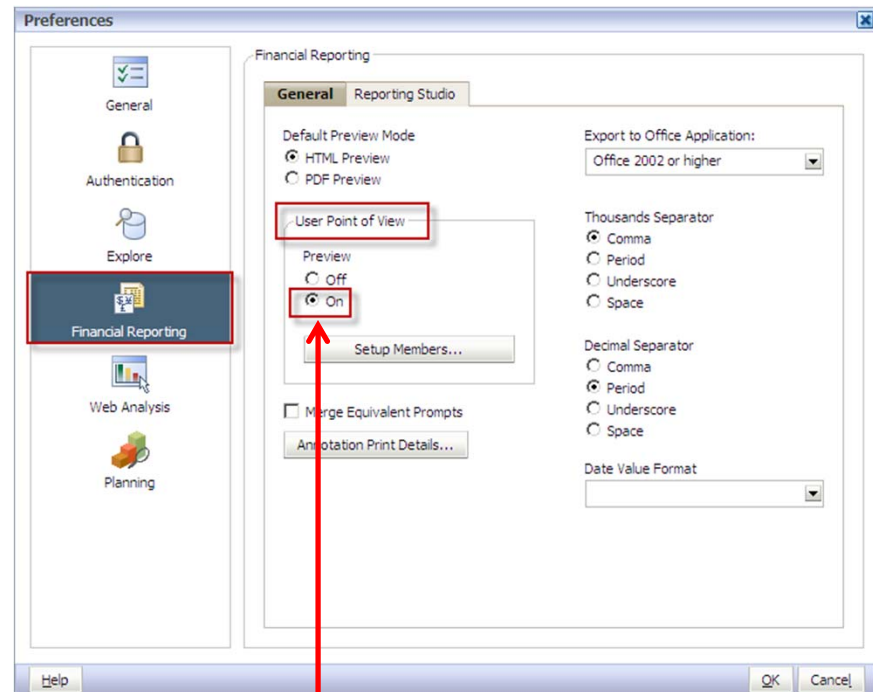
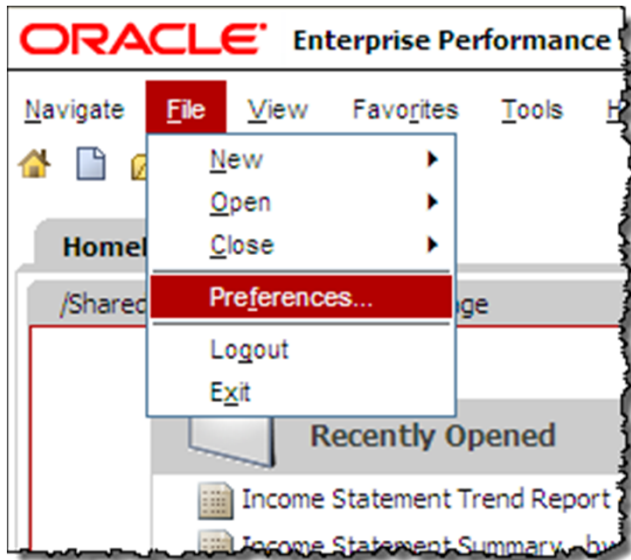
What If I have a blank Homepage?





UMHS Financial Systems Workspace & Smart View Templates

Why do I not see the Preview User Point of View?



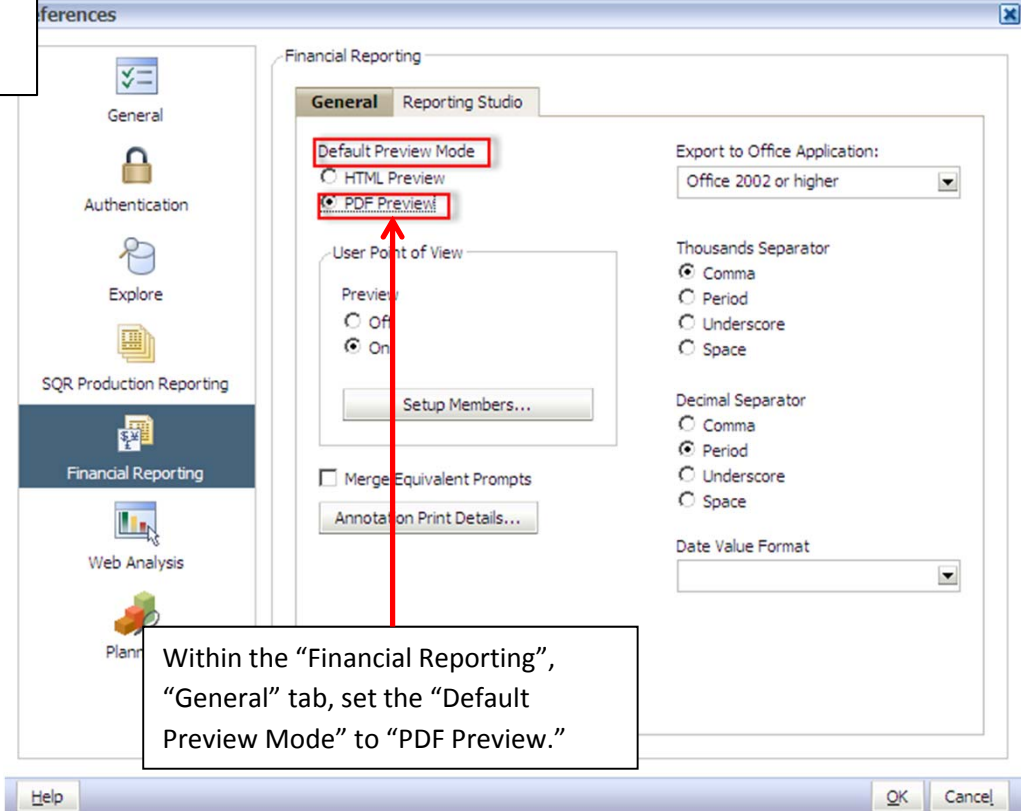
Within the "Financial Reporting",
"General" tab, set the "User Point of
View" to "On."



UMHS Financial Systems Workspace & Smart View Templates

How do I set my reports to view in Boardroom Quality?

For enhanced quality and Boardroom ready reports, set the default viewing mode to PDF.



The screenshot shows the Oracle Financial Reporting Preferences dialog box. The 'General' tab is selected, and the 'Default Preview Mode' is set to 'PDF Preview'. A red arrow points to the 'PDF Preview' radio button. The 'Reporting Studio' sub-tab is also visible, showing options for 'User Point of View' and 'Export to Office Application'.

Within the "Financial Reporting", "General" tab, set the "Default Preview Mode" to "PDF Preview."



UMHS Financial Systems Workspace & Smart View Templates

How do I access the “UMHS Finance Workspace?”

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition interface. The top navigation bar includes 'Navigate', 'File', 'View', 'Favorites', 'Tools', and 'Help'. The 'Explore' button is highlighted with a red arrow. A callout box points to the 'Explore' button with the text: "Select 'Explore' to access the UMHS Financial Reports folder." The main workspace area contains three panels: 'Recently Opened' (with an 'Open...' button), 'Quick Links' (with 'Favorites' and 'Applications' links), and 'Workspace Pages'.

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

Logged in as training | Help | Logout

Navigate File View Favorites Tools Help

Explore

HomePage x

/Shared Workspace Pages/HomePage

Recently Opened

Open...

Quick Links

Favorites

Applications

Workspace Pages

Select "Explore" to access the UMHS Financial Reports folder.



UMHS Financial Systems Workspace & Smart View Templates

How do I access the "Financial Reports?"

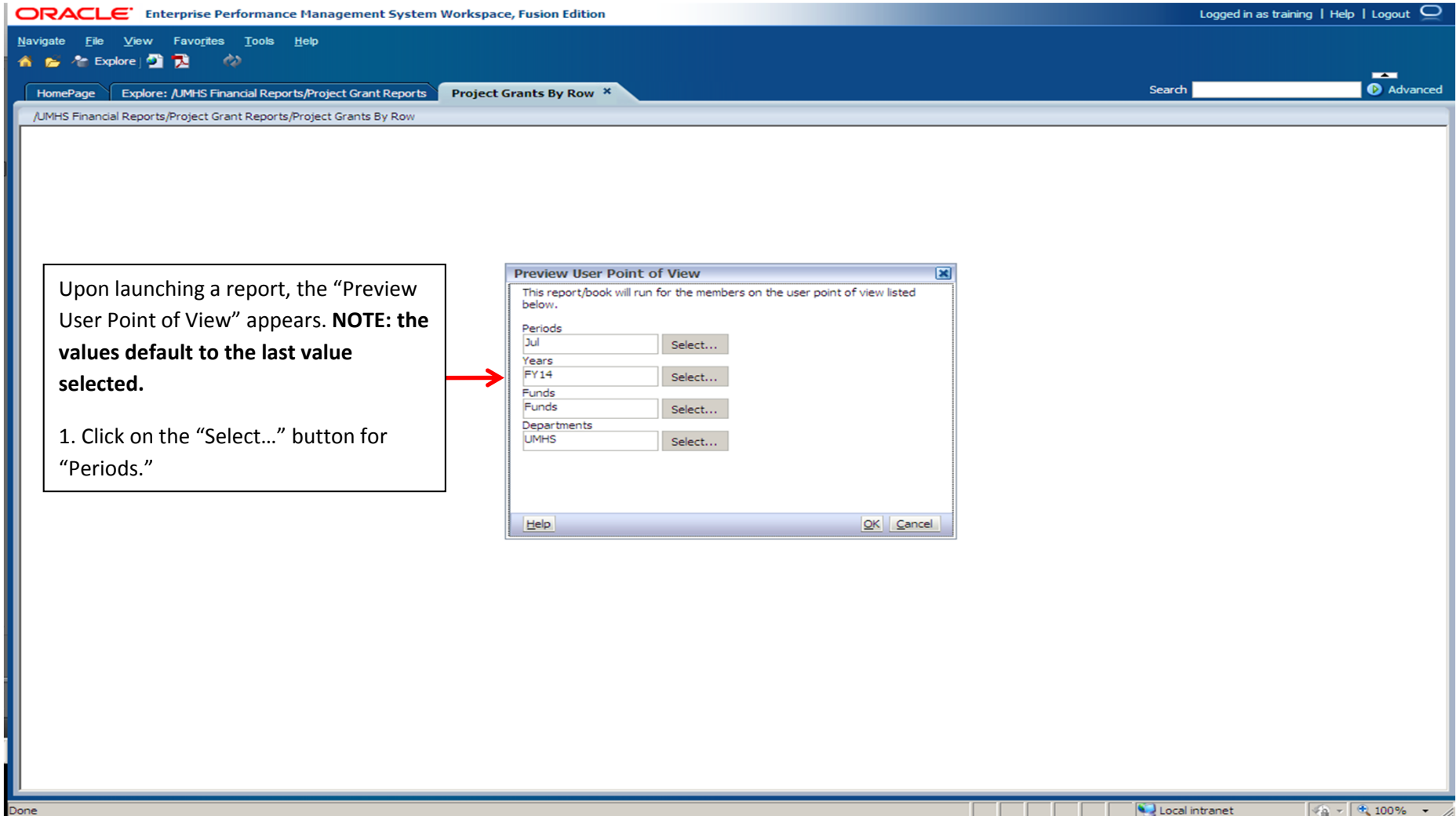
The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition interface. The left pane displays a folder tree with 'Project Grant Reports' selected. The main pane shows a table of reports. Red arrows and callout boxes provide instructions on how to access the reports.

Name	Type	Modified	Description
Project Grants By Row	Financial Reporting Report	12/12/13 9:42 AM	
Project Grants Summary By Column	Financial Reporting Report	12/12/13 10:48 AM	

1. Expand the "UMHS Financial Reports" folder
2. Select the "Project Great Reports" folder
3. Double-click a report name to launch the report

UMHS Finance Workspace & Smart View

The “Preview User Point of View”



ORACLE® Enterprise Performance Management System Workspace, Fusion Edition

Logged in as training | Help | Logout

Navigate File View Favorites Tools Help

HomePage Explore: /UMHS Financial Reports/Project Grant Reports Project Grants By Row

Search Advanced

/UMHS Financial Reports/Project Grant Reports/Project Grants By Row

Upon launching a report, the “Preview User Point of View” appears. **NOTE: the values default to the last value selected.**

1. Click on the “Select...” button for “Periods.”

Preview User Point of View

This report/book will run for the members on the user point of view listed below.

Periods	Jul	Select...
Years	FY14	Select...
Funds	Funds	Select...
Departments	UMHS	Select...

Help OK Cancel

Done Local intranet 100%



UMHS Financial Systems Workspace & Smart View Templates

The “Preview User Point of View”: Select “Period”

ORACLE Enterprise Performance Management System Workspace, Fusion Edition

Logged in as training | Help | Logout

Navigate File View Favorites Tools Help

HomePage Explore: /UMHS Financial Reports/Financial Reports Income Statement Detail

/UMHS Financial Reports/Financial Reports/Income Statement Detail

Advanced

Preview User Point of View

Members

Available: Periods (1-10 of 10)

Find: Name * Use Wildcards

Rows Per Page: 20

Name	Default
[-] Periods	
[-] Year Total	
[-] Q1	
[-] Jul	July 31
[-] Aug	August 31
[-] Sep	September 30
[-] Q2	
[-] Q3	
[-] Q4	
[-] Substitution Variables	

1. Expand out the selection criteria by clicking on the “+” sign

2. Select the specific value you want to filter on

3. Click the “OK” button

Help OK Cancel



UMHS Financial Systems Workspace & Smart View Templates

The “Preview User Point of View”: Run Report

The screenshot shows the Oracle Enterprise Performance Management System Workspace, Fusion Edition interface. The main window displays the 'Project Grants By Row' report. A dialog box titled 'Preview User Point of View' is open, allowing users to select the user point of view for the report. The dialog box contains the following fields and buttons:

- Periods: Jul Select...
- Years: FY14 Select...
- Funds: Funds Select...
- Departments: UMHS Select...

At the bottom of the dialog box, there are buttons for 'Help', 'OK', and 'Cancel'. A red arrow points to the 'OK' button, indicating that it should be clicked to run the report.

Click the “OK” button to run the report.



UMHS Financial Systems Workspace & Smart View Templates

The Report is Returned

ORACLE® Enterprise Performance Management System Workspace, Fusion Edition

Navigate File View Favorites Tools Help

Home Page Explore: /UMHS Financial Reports/Project Grant Reports Project Grants Summary By Column x

/UMHS Financial Reports/Project Grant Reports/Project Grants Summary By Column

Periods: Jul Years: FY14 Funds: F10000 Departments: D231000

NOTE: You can also filter on a specific attribute within the report.

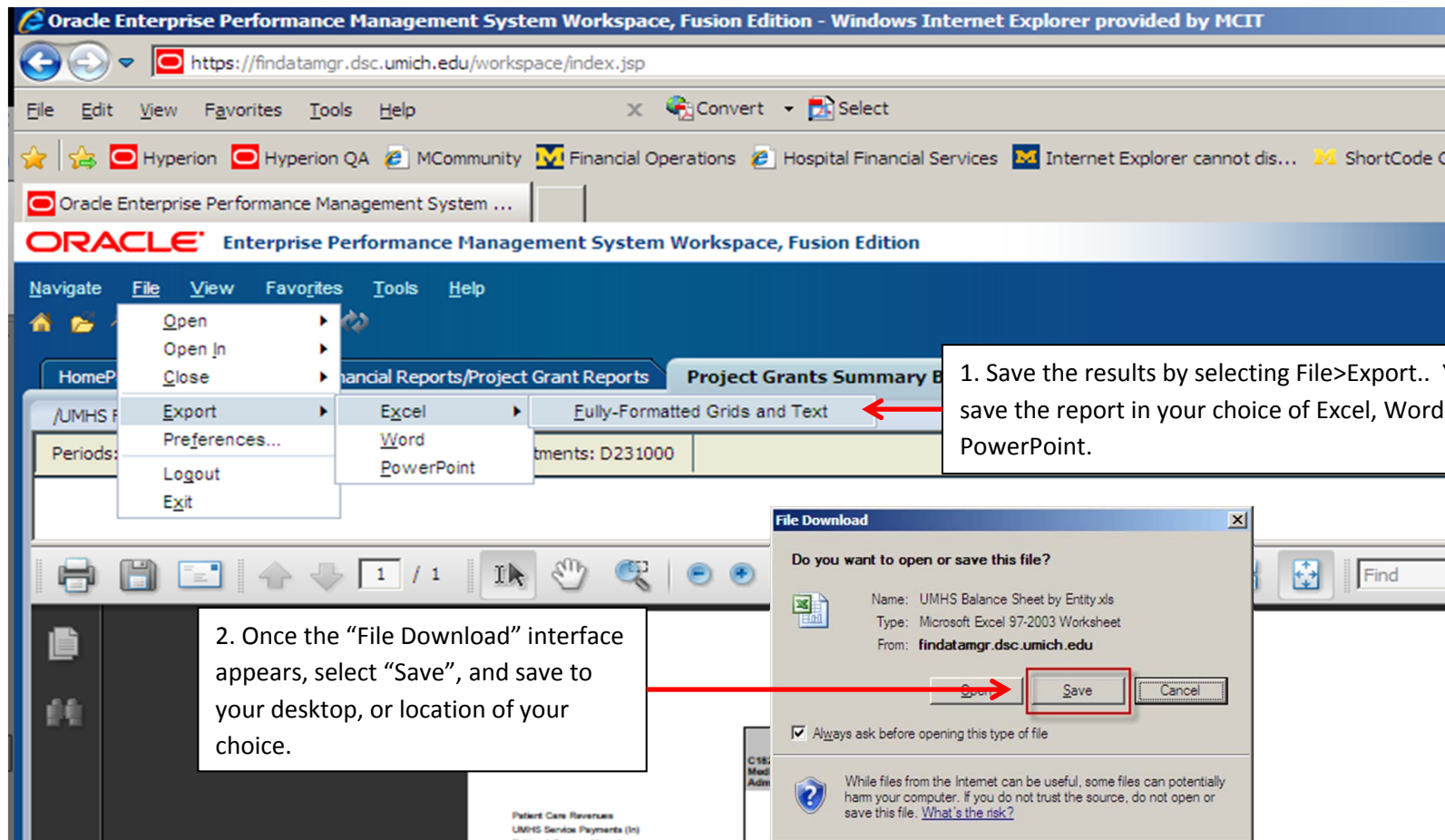
64.5% Collaborate Sign Find

University of Michigan Health System
231000 - Medical School Administration
Change in Net Assets
Project Grant Summary
Fiscal Year To Date Ending July 31, FY14
F10000 - 10000 - General

	C182190 - Medical Administration	F033123 - 072847-Sub of F028361-Transla	U017326 - BSRB Central Facilities Costs	Blank Project Grant	Grand Total
Patient Care Revenues	0	0	0	0	0
UMHS Service Payments (In)	0	0	0	0	0
Tuition & Provost Allocation	244,969	0	0	0	244,969
Total Research (Directs & Indirects)	0	0	0	0	0
Gifts & Other Income	(362,833)	(24,372)	0	0	(387,205)
Total Operating Revenue	(117,864)	(24,372)	0	0	(142,236)
Faculty Salaries	4,573	0	0	0	4,573
Nursing MNA Salaries	0	0	0	0	0
Other Staff Salaries	(580)	0	0	0	(580)
Fringe Benefits	664	0	0	(7,581)	(6,918)
Total Payroll	4,648	0	0	(7,581)	(2,933)
Supplies	0	0	3,668	0	3,668

UMHS Financial Systems Workspace & Smart View Templates

Save Results



1. Save the results by selecting File>Export.. You can save the report in your choice of Excel, Word, or PowerPoint.

2. Once the "File Download" interface appears, select "Save", and save to your desktop, or location of your choice.



UMHS Financial Systems Workspace & Smart View Templates

Smart View Templates in Microsoft Excel



UMHS Financial Systems Workspace & Smart View Templates

What if I don't have a Smart View tab?

If you don't have a Smart View tab in Excel, then it's not installed.

Click [here](https://wiki.umms.med.umich.edu/display/UMHSHELPDESK/Oracle+Hyperion+Smart+View+for+Office) or type in the following URL in your browser:
<https://wiki.umms.med.umich.edu/display/UMHSHELPDESK/Oracle+Hyperion+Smart+View+for+Office>

Follow the instructions on this site to download and install Smart View..

Oracle Hyperion Smart View for Office
Erik Randall Zempel, last edited by Eric W Weimer on Jan 22, 2013 (view change)
You are currently logged in.

for Office, an application used by UMHS Finance, is required for viewing Hyperion reports.

Smart View for Office (Smart View) is a component of Hyperion Foundation Services. Smart View provides a soft Office interface designed specifically for Oracle's Enterprise Performance Management (EPM) and Business Intelligence (BI) content. Using Smart View, you can view, import, manipulate, distribute and share data in Microsoft Excel, Word and PowerPoint. It is a comprehensive tool for accessing and integrating EPM and BI content from Microsoft Office products. For more details, see the [Smart View for Office overview](#) page for more details.

Smart View for Office Installation
Installation of the Smart View Client requires Administrator rights on the destination machine.

1. Download the Smart View client by clicking the following link: [SmartView.exe](#)
2. Locate and double-click the downloaded file, *SmartView.exe*.
3. At the *Choose Setup Language* window, select **English** and click the **OK** button.
4. At the *Welcome* screen, click the **Next** button.

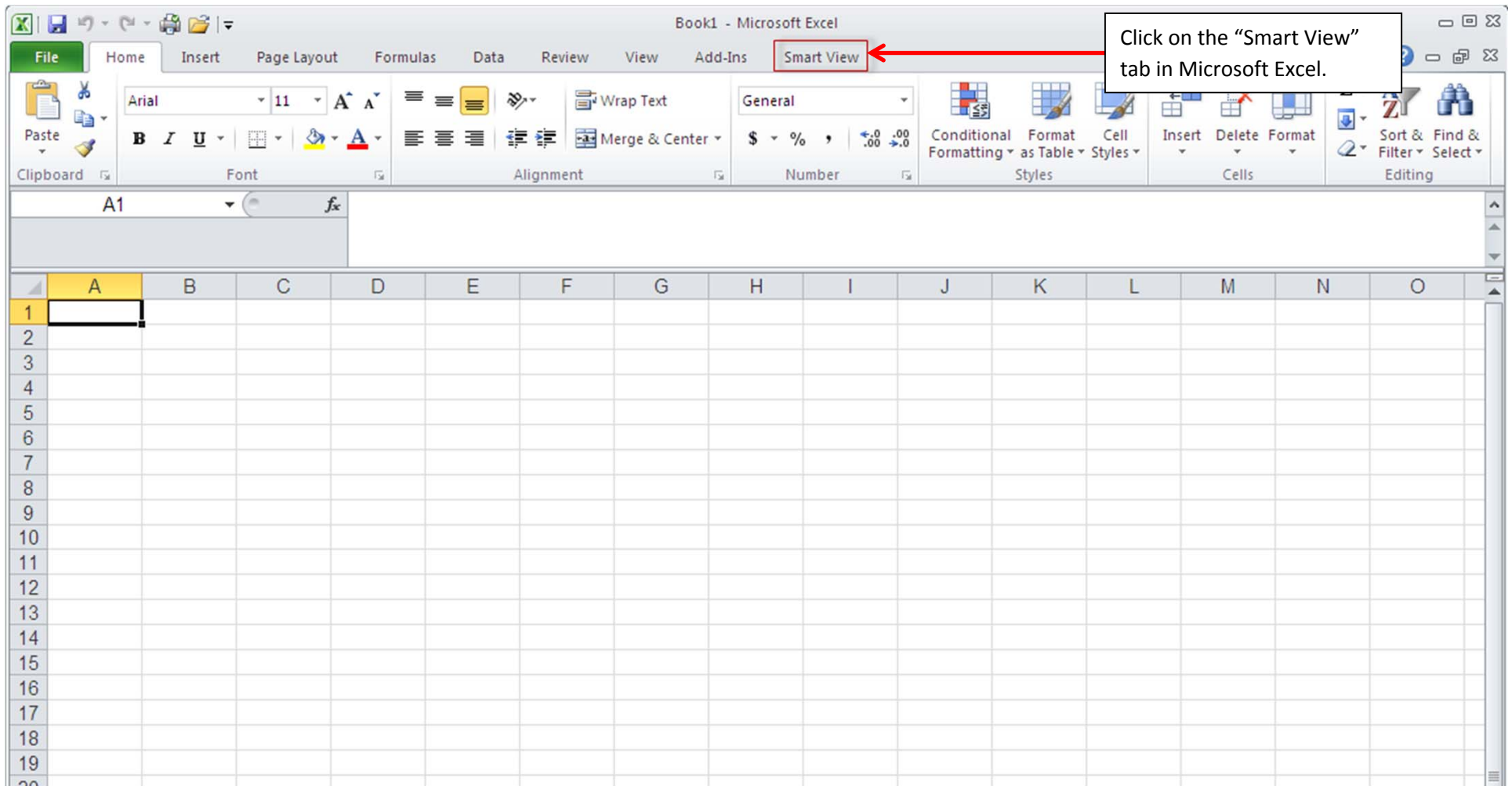
Medical School Information Services Solutions Center

Phone: 734-763-7770
Email: msishelp@umich.edu
Web: [Submit a support ticket](#)



UMHS Financial Systems Workspace & Smart View Templates

How do I get to Smart View?





UMHS Financial Systems Workspace & Smart View Templates

Configuring Smart View for First Time Use

Variance Templates-v090613.xlsx - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Smart View

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

Start Edit Data General

1. Select "Options" on the Smart View ribbon.

2. Select "Advanced".

Member Options
Data Options
Advanced
Formatting
Cell Styles
Extensions

Change global Smart View options.

General

Shared Connections URL:

Number of Undo Actions: 9

Number of Most Recently Used items: 9

Delete All MRU Items

Logging

Log Message Display

Route Messages to File

Clear Log File on Next Launch

3. Enter the following URL into the Shared Connections Text box.
<http://findatamgr.dsc.umich.edu/workspace/SmartViewProviders>
Capitalization matters.



UMHS Financial Systems Workspace & Smart View Templates

How do I connect to a Smart View Data Source?

The screenshot shows the Microsoft Excel interface with the Smart View ribbon selected. The 'Panel' button is highlighted with a red box and a red arrow pointing to it. A text box with the instruction '1. Click the "Panel" button on the Smart View ribbon.' is positioned over the ribbon. Below the ribbon, the Excel grid is visible with cell A1 selected. On the right side, the Smart View Panel is open, showing 'Shared Connections' highlighted with a red box and a red arrow. A text box with the instruction '2. Click on "Shared Connections" in the Smart View Panel.' is positioned over the panel.

1. Click the "Panel" button on the Smart View ribbon.

2. Click on "Shared Connections" in the Smart View Panel.



UMHS Financial Systems Workspace & Smart View Templates

Sign In to the Data Source

The screenshot shows the Microsoft Excel interface with the 'Smart View' ribbon selected. A 'Connect to Data Source' dialog box is open, prompting for user authentication. The dialog box contains the following information:

Connect to Data Source

User Authentication Needed.
Enter correct username and password to sign on.

User Name:

Password:

URL:

Provider:

The 'Smart View' task pane on the right side of the Excel window displays a list of connections and reports under the heading 'Recently Used'. The list includes:

- BI+ Report: Project Grants Summary By Column (http://findatamgr.dsc.umich.edu:80/raframev)
- Ad hoc Grid: topaz.dsc.umich.edu | Demo | Basic
- Ad hoc Grid: UMHSCons_TrialBal
- Ad hoc Grid: UMHSCons_TrialBal_QA
- Ad hoc Grid: FINANCE_IncStmnt
- BI+ Report: Balance Sheet Summary (http://findatamgr.dsc.umich.edu:80/raframev)
- BI+ Report: Income Statement Summary (http://findatamgr.dsc.umich.edu:80/raframev)
- Ad hoc Grid: owl.dsc.umich.edu | Cons0713 | TrialBal
- BI+ Report: HHC Balance Sheet Summary (http://findatamgr.dsc.umich.edu:80/raframev)

A red arrow points from a text box to the 'Connect to Data Source' dialog box.

You will be prompted to log into the data source. Enter your Level 1 user name and password.



UMHS Financial Systems Workspace & Smart View Templates

Which Shared Connection do I use to access the reports?

A screenshot of the Microsoft Excel Smart View interface. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Add-Ins, and Smart View. The Smart View tab is active, showing a 'Connections' group with buttons for Start, Refresh, and Submit Data. The main grid shows column A selected. On the right, the 'Smart View' task pane is open, displaying a list of 'Shared Connections'. The connections listed are 'Reporting and Analysis Framework', 'Oracle® Essbase', 'Oracle® Hyperion Planning, Fusion Edition', and 'Reporting and Analysis Framework'. A red arrow points from a text box to the first 'Reporting and Analysis Framework' connection.

Select the "Reporting and Analysis Framework" connection.



UMHS Financial Systems Workspace & Smart View Templates

How do I access the “Project Grant Reports” in Smart View?

The screenshot shows the Microsoft Excel Smart View interface. The main window displays a grid with columns A through Q and rows 1 through 52. The Smart View pane on the right is titled "Smart View" and shows a tree view of data sources under "Reporting and Analysis Framework". The tree view includes the following nodes:

- http://findatamgr.dsc.umich.edu:80/raframework
 - Broadcast Messages
 - Crystal Ball Workbooks
 - Shared Workspace Pages
 - System
 - UMHS Finance Workspace
 - UMHS Financial Reports
 - Budget and Forecast
 - Financial Reports
 - Management Reports
 - Project Grant Reports
 - Project Grants By Row
 - Project Grants Summary By Column

Three numbered instructions are overlaid on the grid, with red arrows pointing to the corresponding nodes in the Smart View pane:

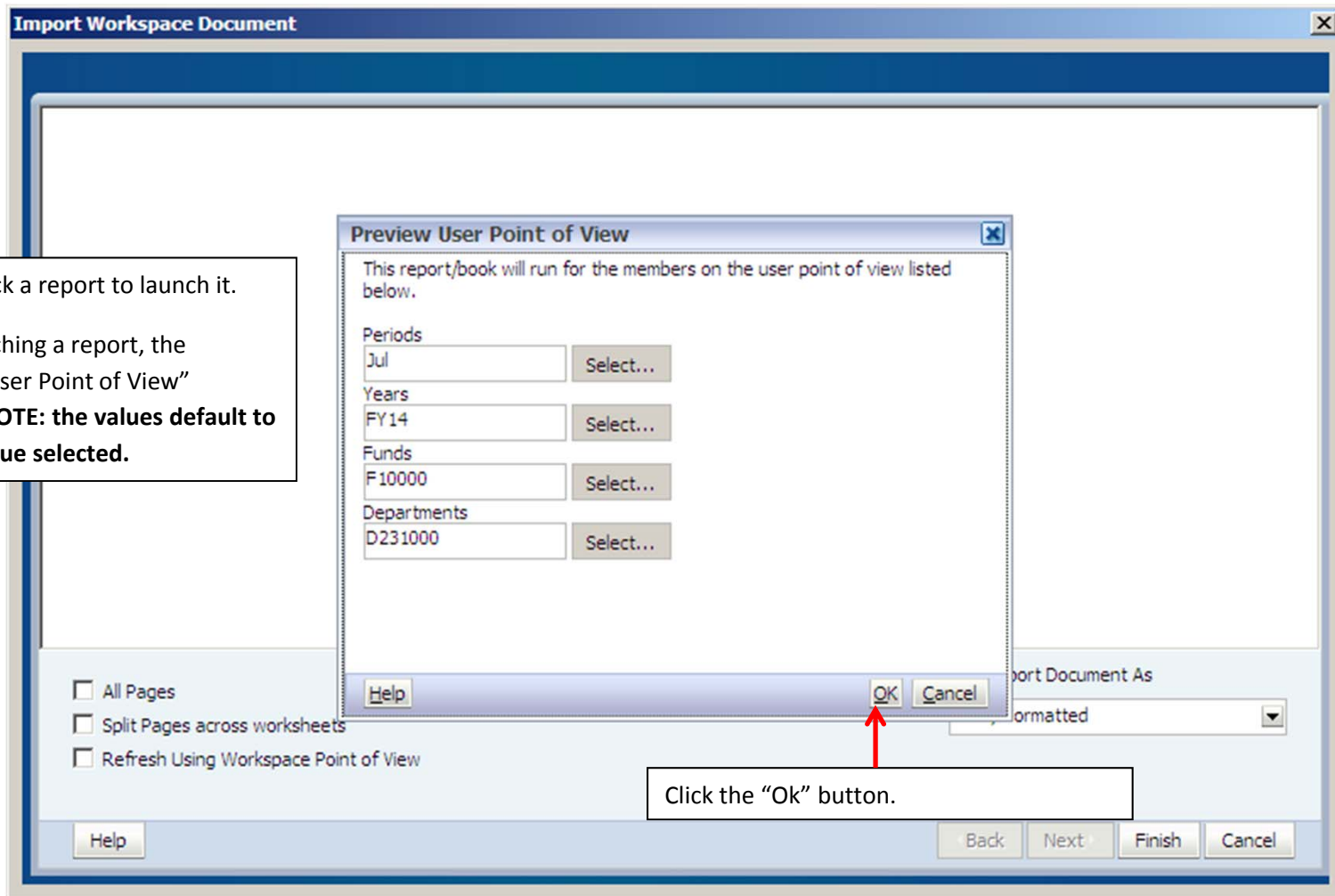
1. Expand the topmost node
“http://findatamgr.dsc.umich.edu:80/raframework/browse/listXML.”
2. Expand “UMHS Financial Reports”.
3. Expand “Project Grant Reports”.

UMHS Financial Systems Workspace & Smart View Templates

The “Preview User Point of View”

Double-Click a report to launch it.

Upon launching a report, the
“Preview User Point of View”
appears. **NOTE: the values default to
the last value selected.**



Import Workspace Document

Preview User Point of View

This report/book will run for the members on the user point of view listed below.

Periods
Jul Select...

Years
FY14 Select...

Funds
F10000 Select...

Departments
D231000 Select...

Help OK Cancel

Report Document As
Formatted

All Pages
Split Pages across worksheets
Refresh Using Workspace Point of View

Help Back Next Finish Cancel

Click the “Ok” button.



UMHS Financial Systems Workspace & Smart View Templates

The “Preview User Point of View”

The report is populated within the “Import Workspace Document” dialog box.

Click the “Finish” button to import the report into Excel.

	C182190 - Medical Administration	F033123 - 072847-Sub of F026361-Translat	U017326 - BSRB Central Facilities Costs	Blank Project Grant	Grand
Patient Care Revenues	0	0	0	0	0
UMHS Service Payments (In)	0	0	0	0	0



UMHS Financial Systems Workspace & Smart View Templates

The “Preview User Point of View”

The report has been imported into Microsoft Excel.

	C182190 - Medical Administration	F033123 - 072847-Sub of F026361-Trans	U017326 - BSRB Central Facilities Cost	Blank Project
Patient Care Revenues	0	0	0	0
UMHS Service Payments (In)	0	0	0	0
Tuition & Provost Allocation	244,969	0	0	0
Total Research (Directs & Indirects)	0	0	0	0
Gifts & Other Income	(362,833)	(24,372)	0	0
Total Operating Revenue	(117,864)	(24,372)	0	0
Faculty Salaries	4,573	0	0	0
Nursing MNA Salaries	0	0	0	0
Other Staff Salaries	(589)	0	0	0
Fringe Benefits	664	0	0	0
Total Payroll	4,648	0	0	0
Supplies	0	0	0	3,668
Other Expenses	0	0	0	0
Depreciation	0	0	0	0
UMHS Service Payments (Out)	0	0	0	6,813
Maintenance & Facility Costs	0	0	0	0
Total Other Expenses	0	0	0	10,481
Total Operating Expense	4,648	0	0	10,481
Operating Margin (Loss)	(122,512)	(24,372)	0	(10,481)
Operating Margin %	103.9%	100.0%	0.0%	0.0%
UMHS Support	0	0	0	0
Construction Gifts	0	0	0	0
Endowment Gifts	0	0	0	0