

Downloading and Installing Smart View on your Computer

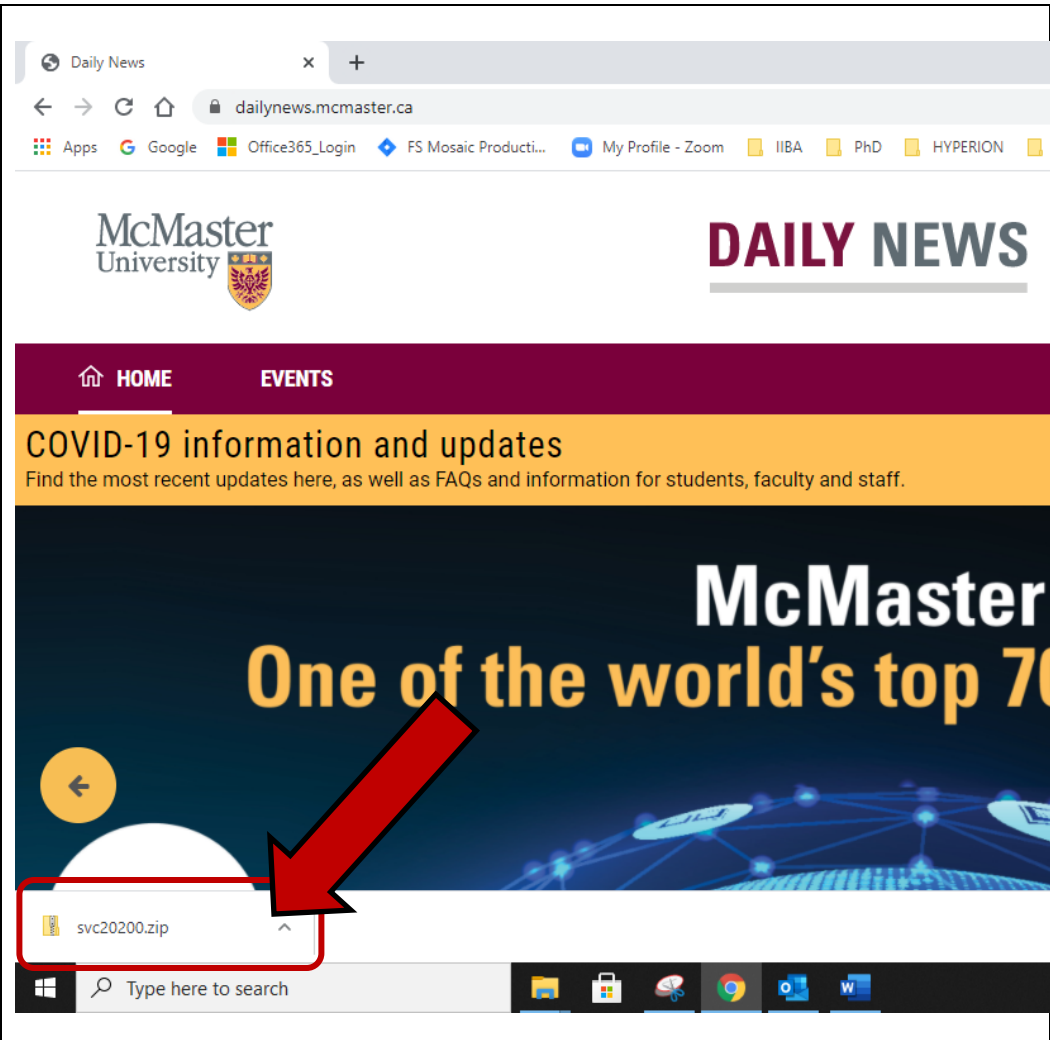
Pre-Requisites:

- *Microsoft Excel must be installed locally on your computer to use Smart View. It will not work through the O365 Browser version of Excel.*
- *When working remotely, you must also have a McMaster VPN connection.*
- *To install SmartView, you must have Administrator rights to your computer.*

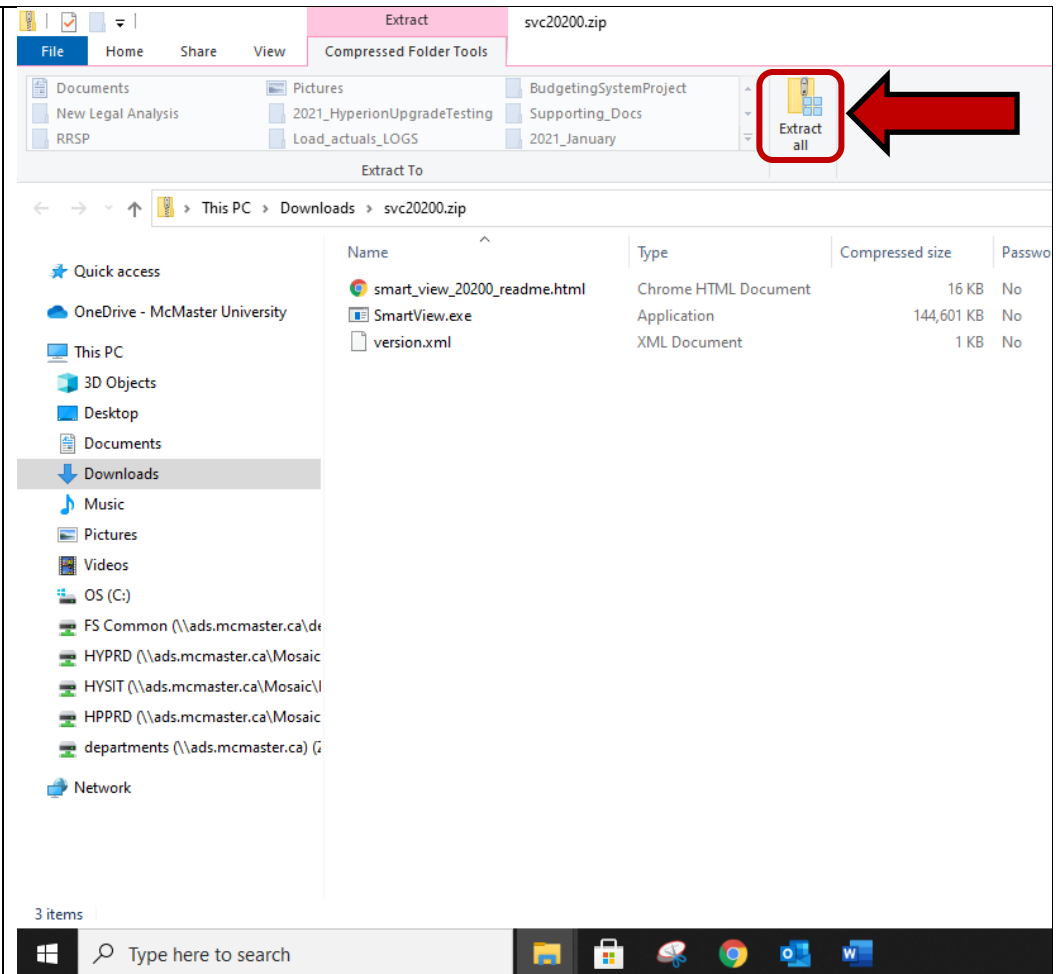
1. Download Smart View by clicking on the link below:

<https://uts.mcmaster.ca/download/smart-view/?wpdmdl=4819&masterkey=6058cbb4bf4ac>

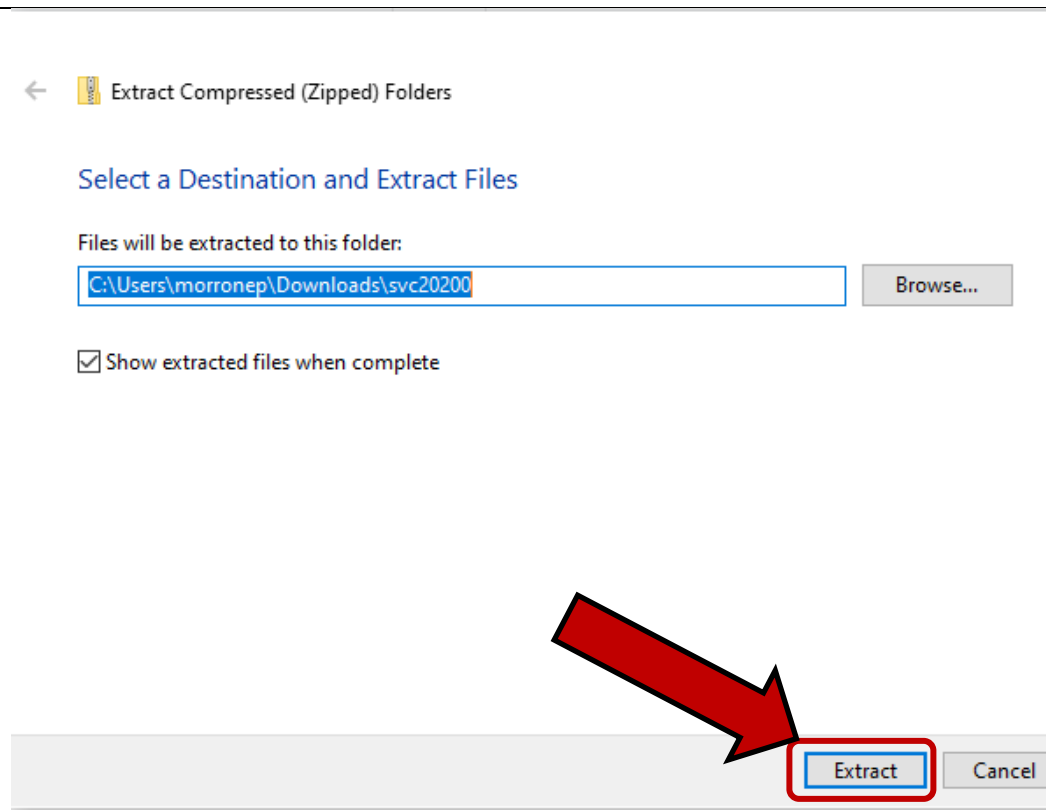
This will download the file svc20200.zip



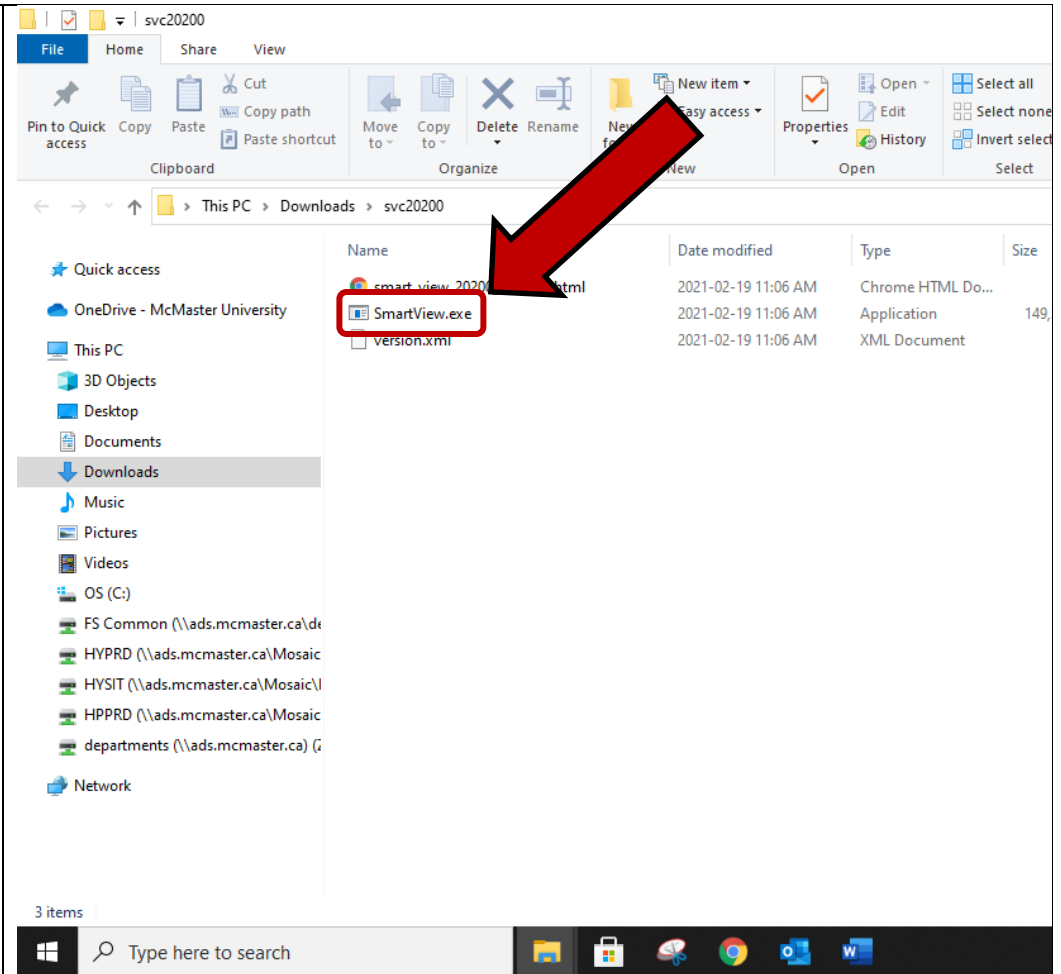
2. From your browser click the svc20200.zip Icon, this will open a Windows Explorer pop up.
Click the **Extract ALL** button to Unzip the file to a temporary location.



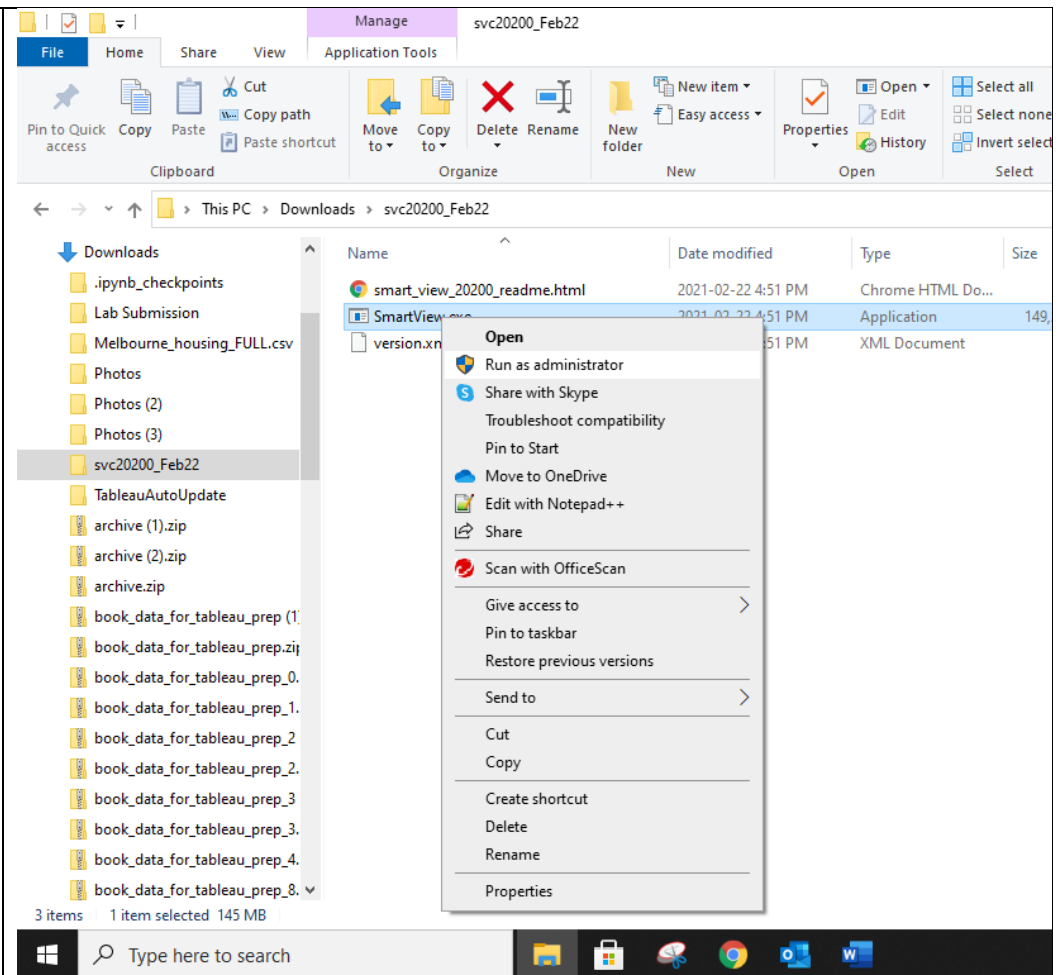
3. In the Pop-Up click the **Extract** button, the system will ask in which Folder you wish to save the files.



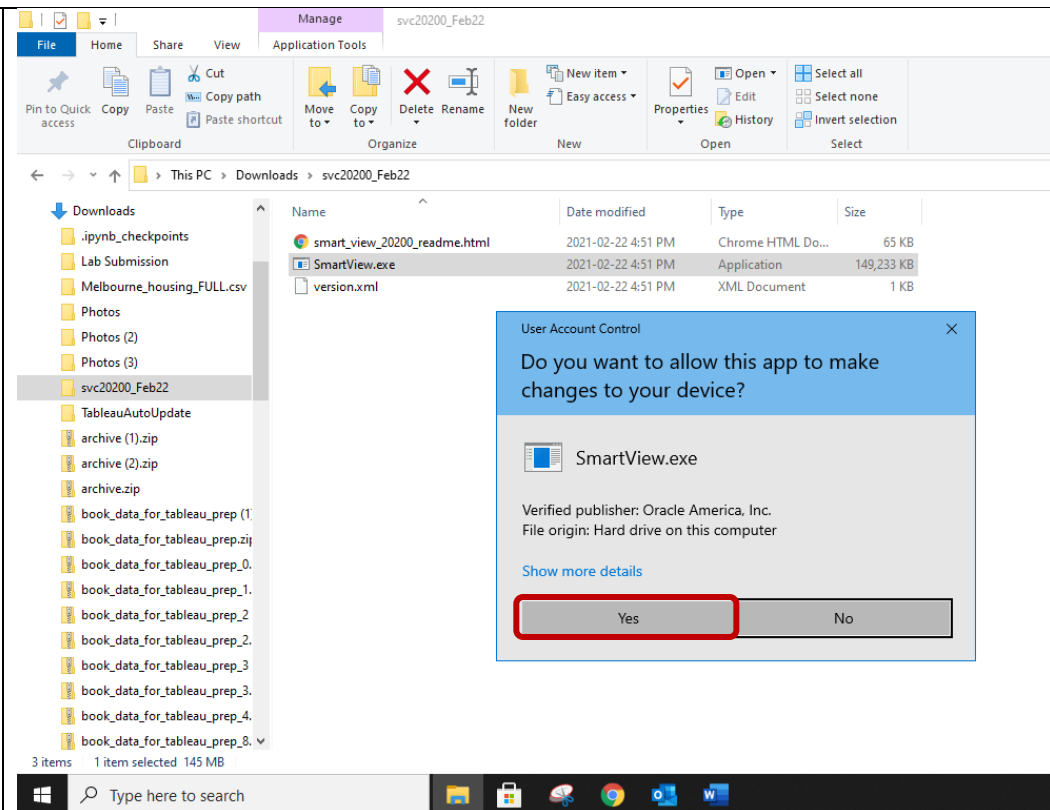
4. The system then shows you all the extracted files in Windows Explorer.
Select the file called SmartView.exe and then RIGHT click



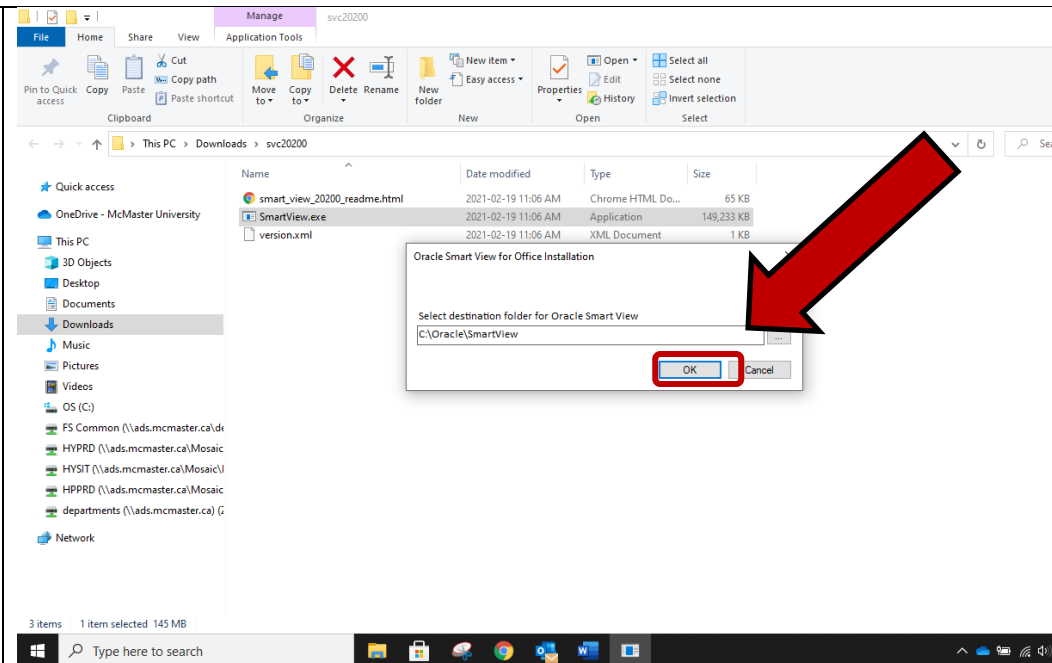
5. A menu opens, then select **Run as administrator**



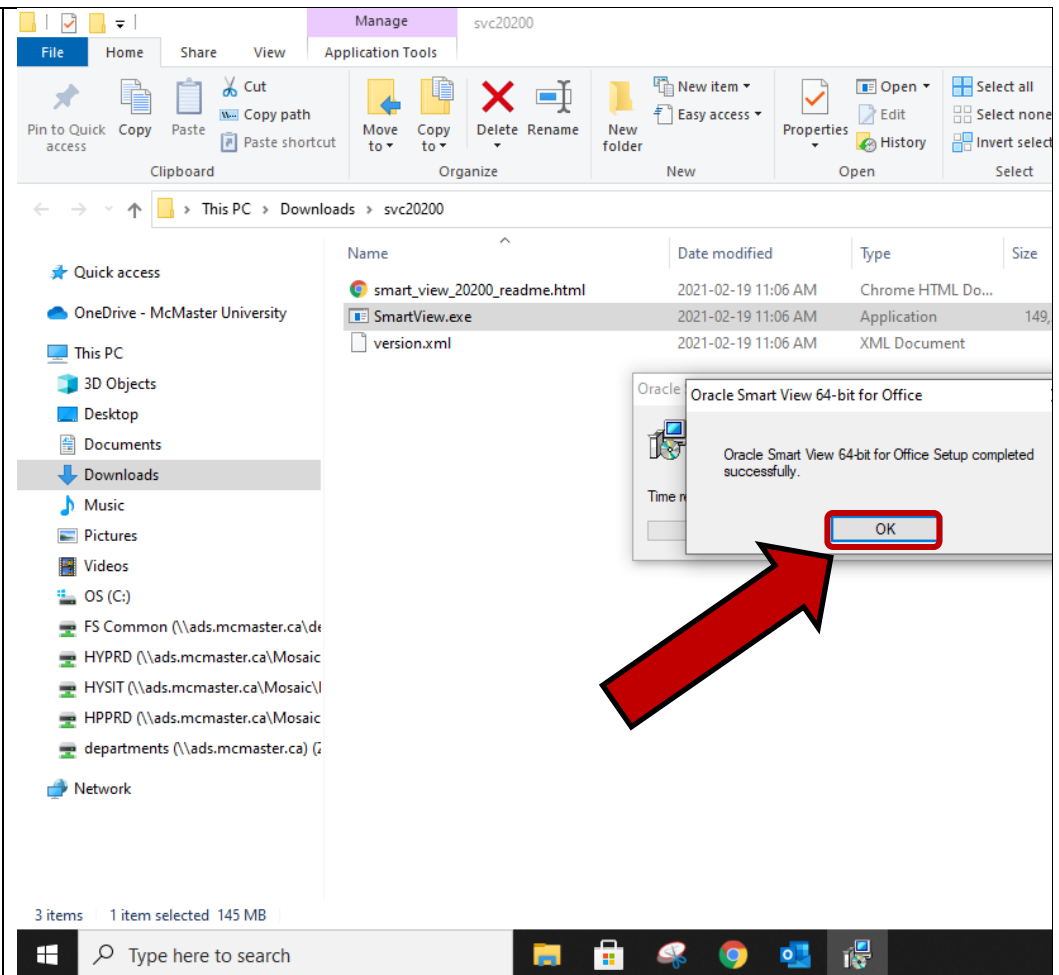
6. Click **YES** on the pop-up indicating to allow the app to make changes to your device



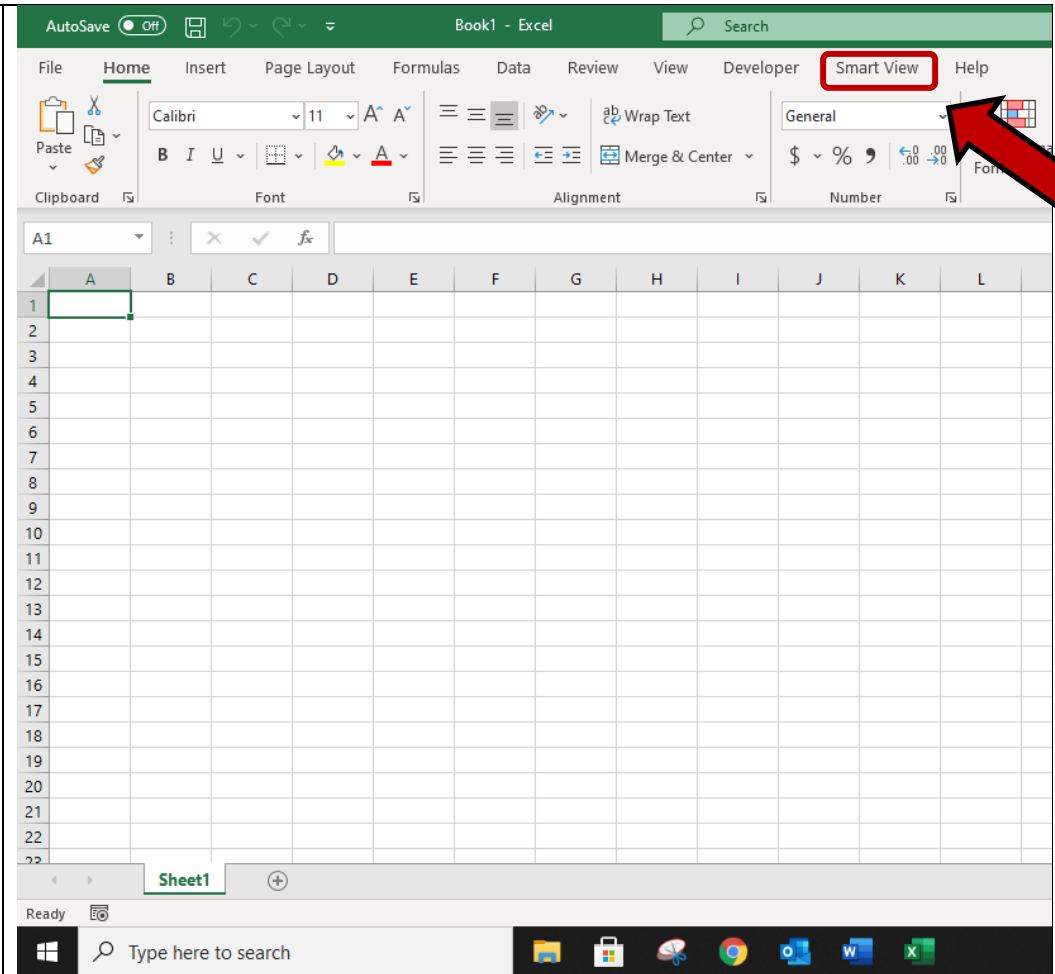
7. To start the installation wizard, right-click SmartView.exe and select Run as administrator.



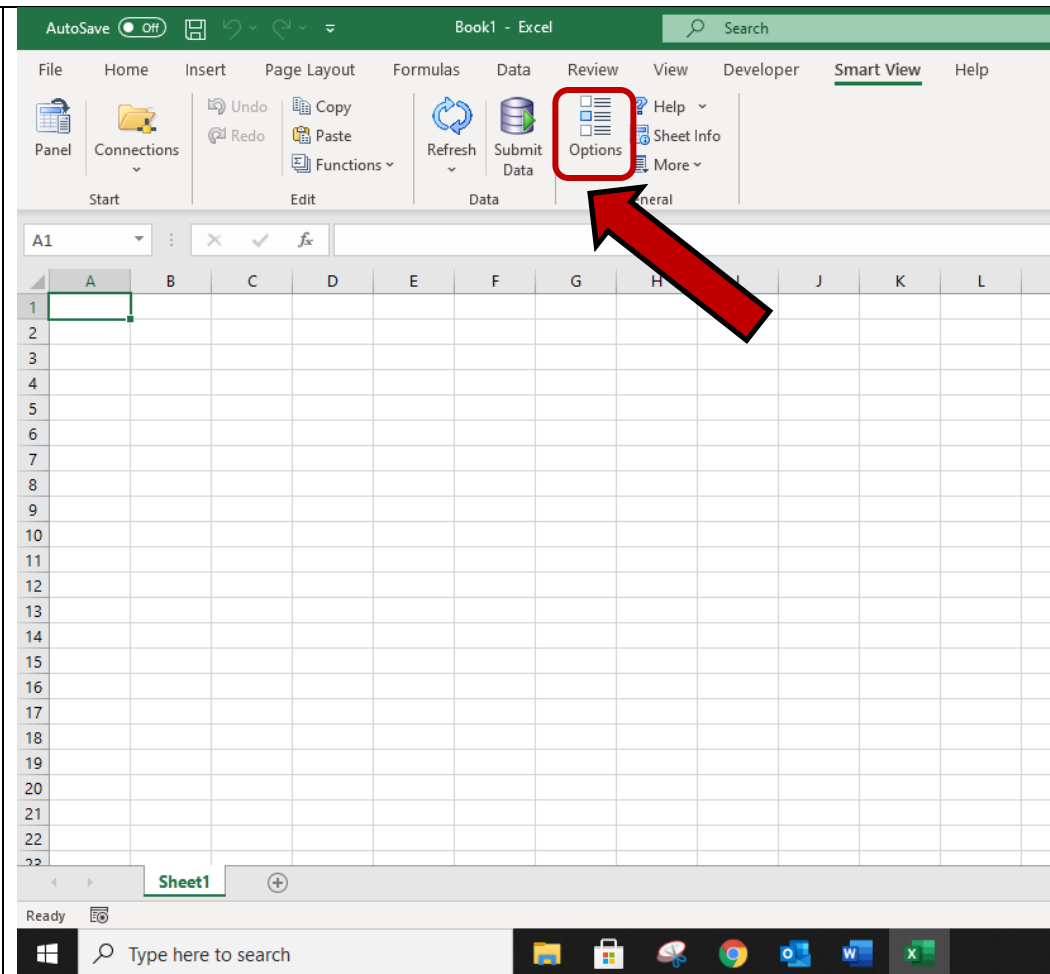
8. When the installation is complete a pop-up will come up. Click OK button.



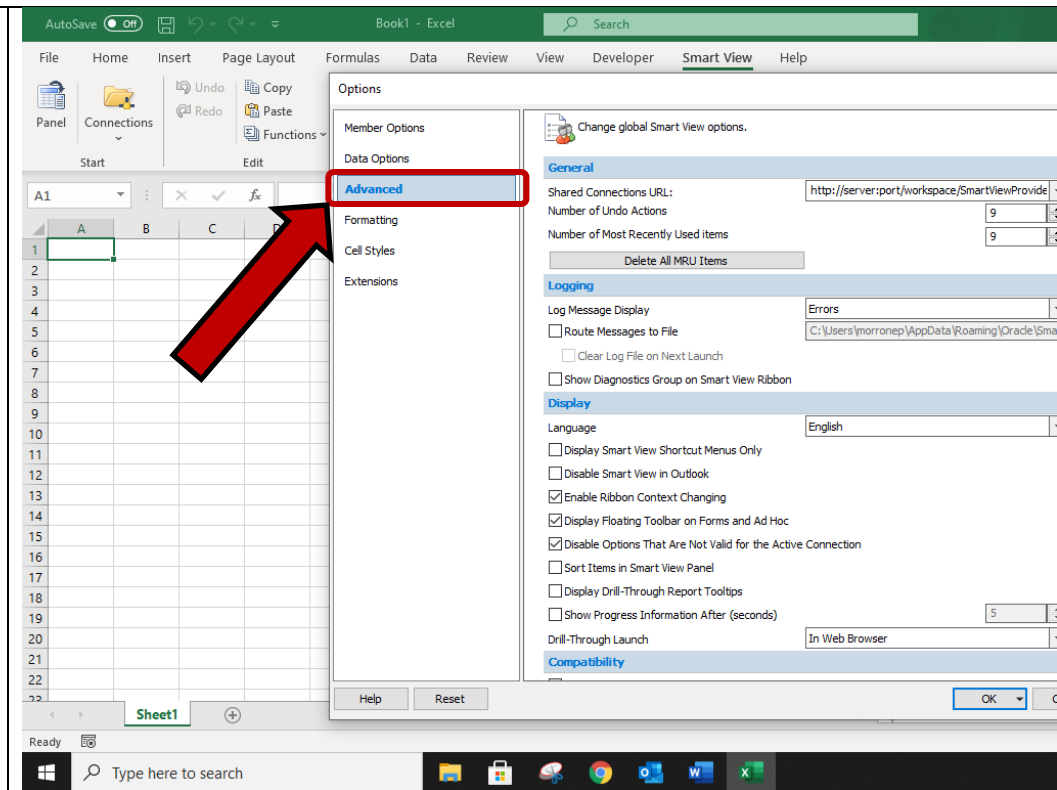
9. Open Microsoft Excel on your Computer and validate that the Smart View ribbon is displayed. I



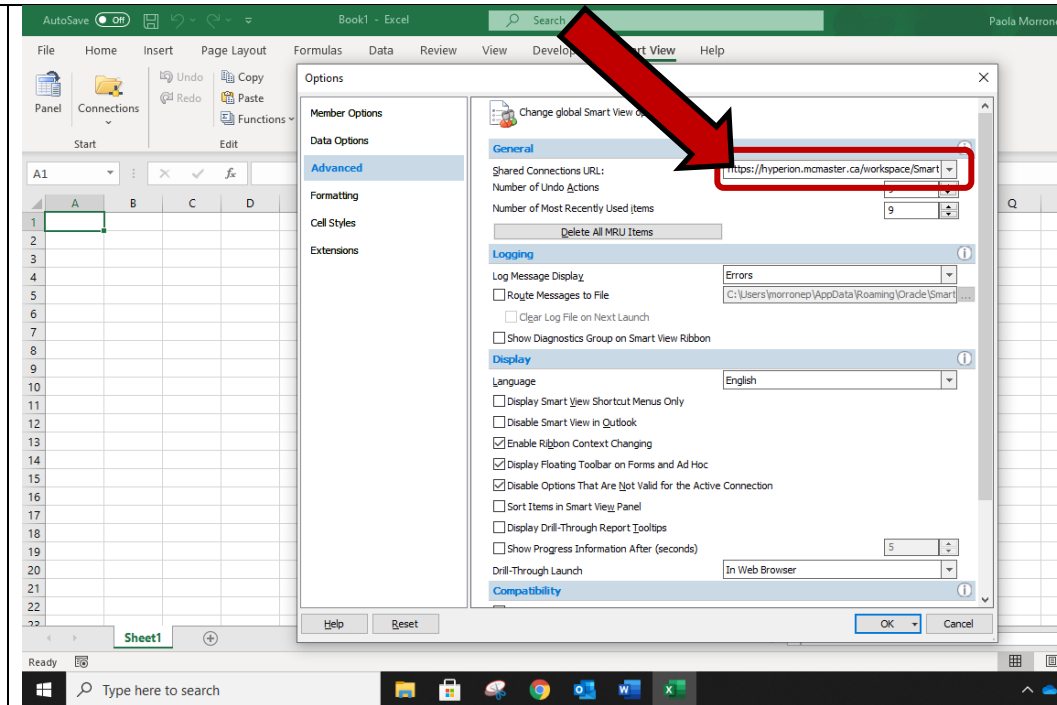
10. Click on the SmartView Tab and then click on Options to start setting up the connection to the Hyperion database



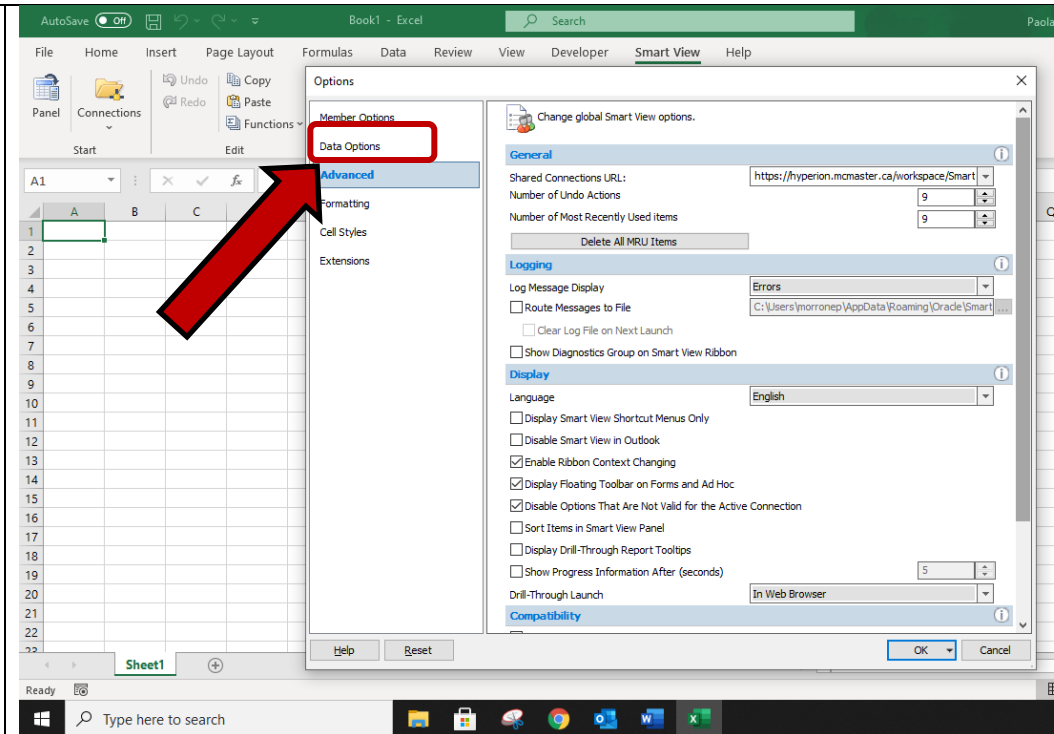
11. The SmartView options Pop-Up opens. Select Advanced



12. In the Shared Connections URL box enter:
<https://hyperion.mcmaster.ca/workspace/SmartViewProviders>

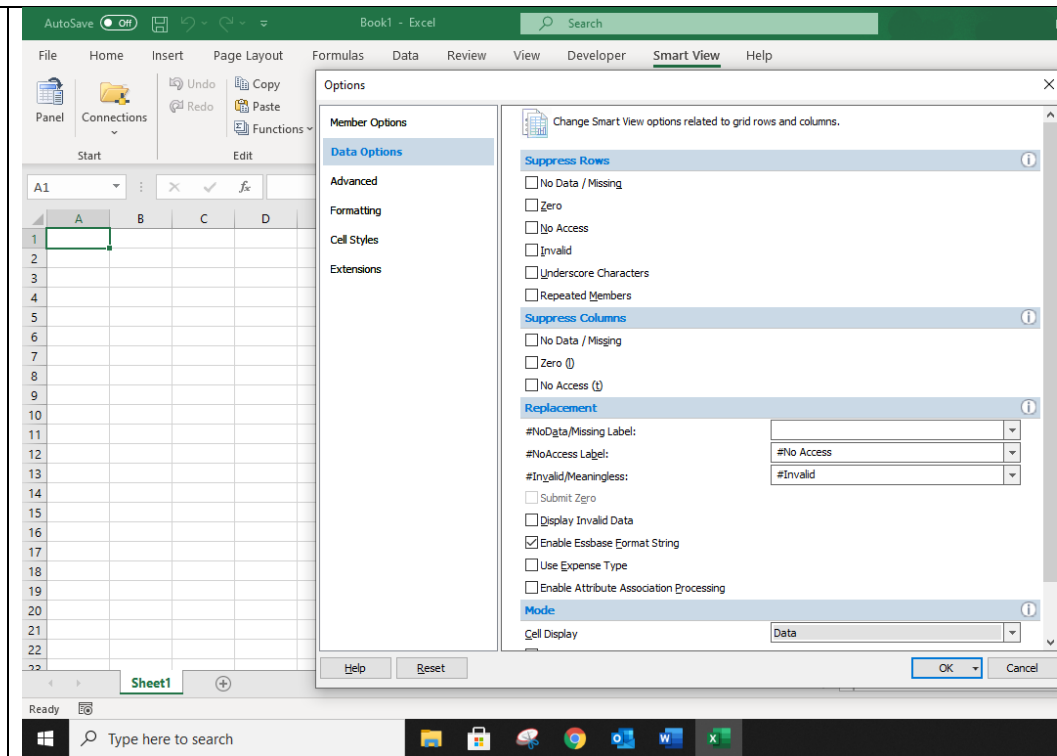


13. Click Data Options in the SmartView options pane

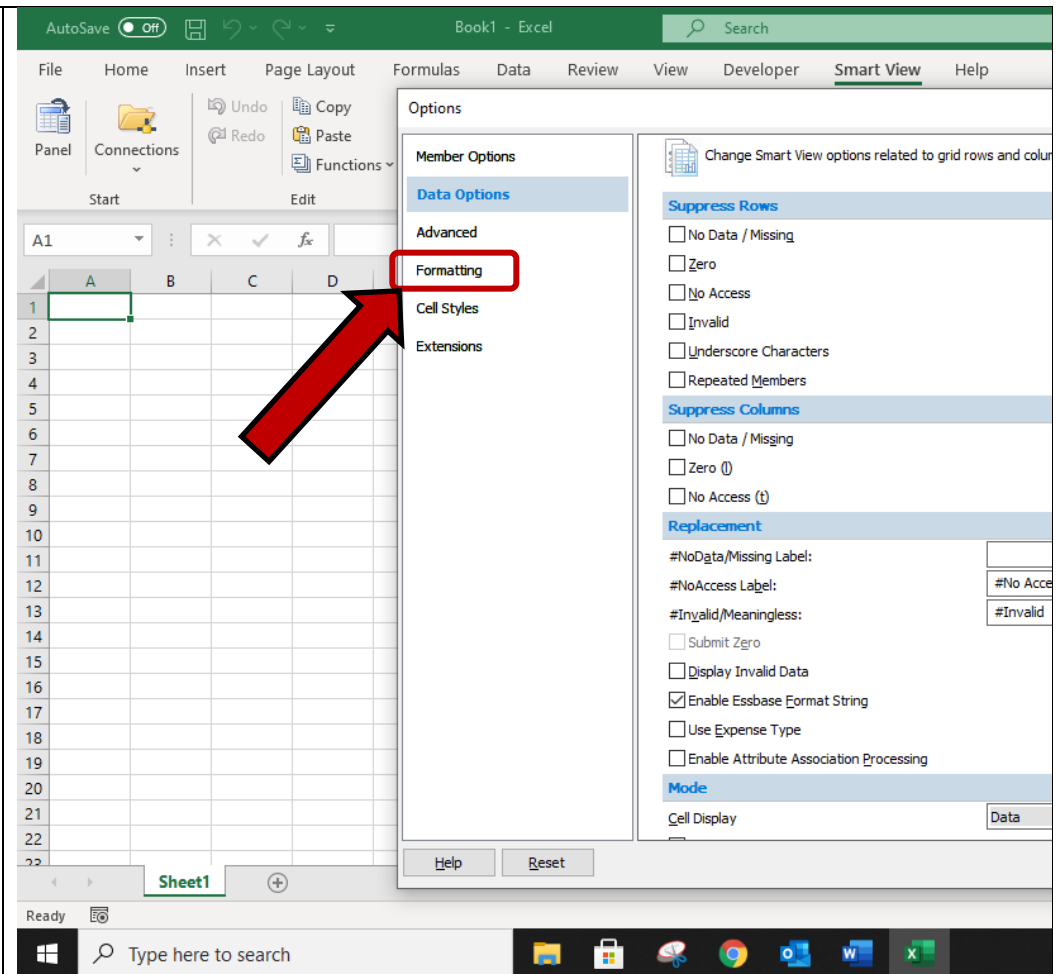


14. In the #NoData/ Missing Label box, select the word #Missing and delete it, leaving the box **empty**

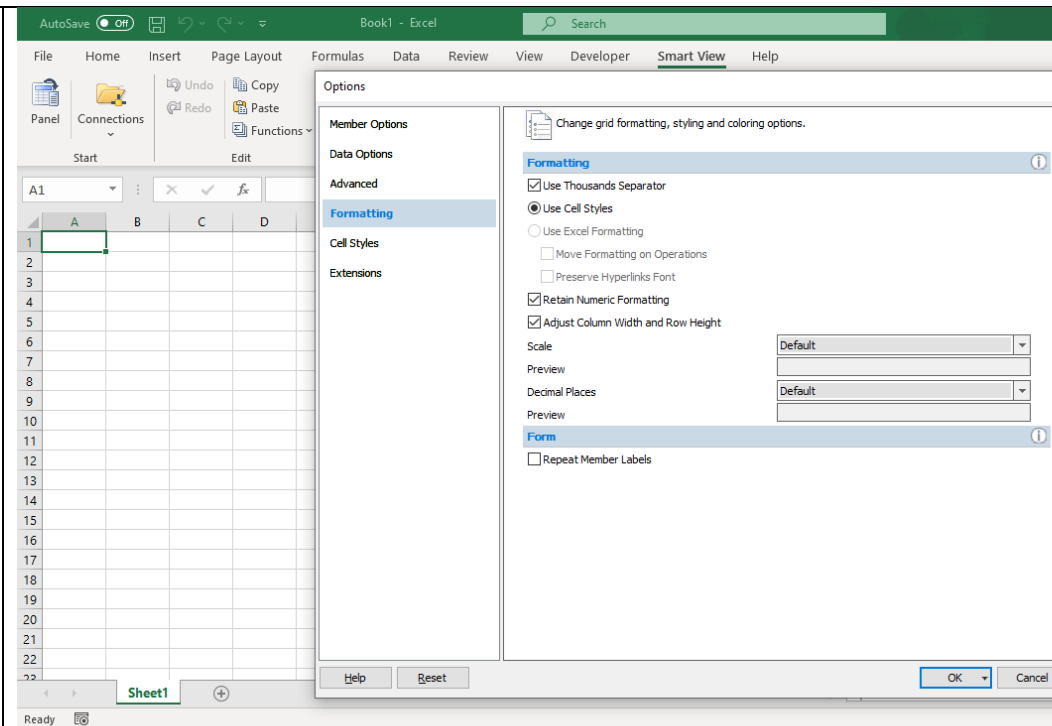
Ensure all the check boxes under the Suppress Rows and Suppress Columns sections are **unchecked**



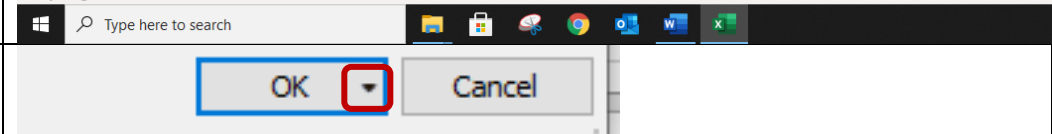
15. Click on the Formatting option on the SmartView Options Pane



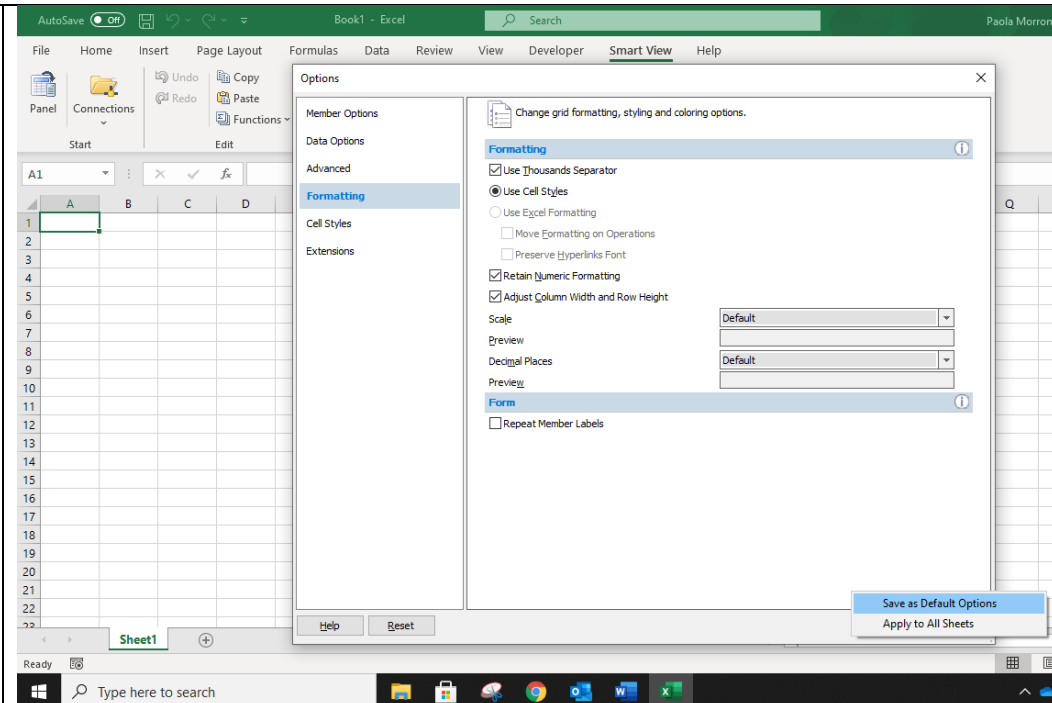
16. Check the Use Thousands separator check box, select the Use Cell Styles radio button, check the Retain Numeric Formatting and check the Adjust Column width and Row highs check boxes.



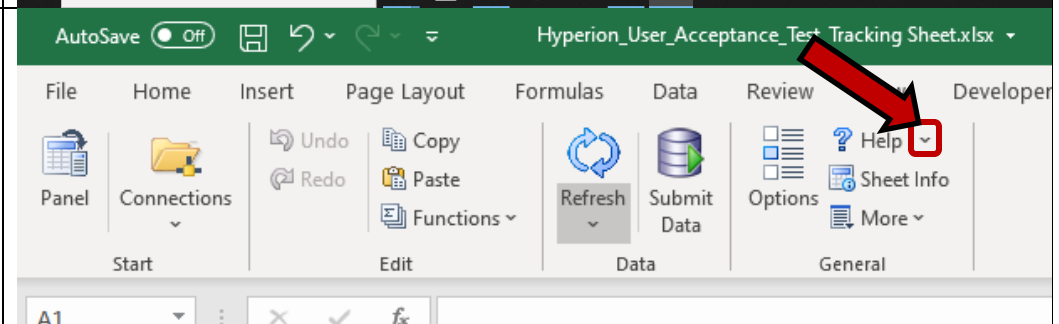
17. Click the dropdown arrow on the OK button



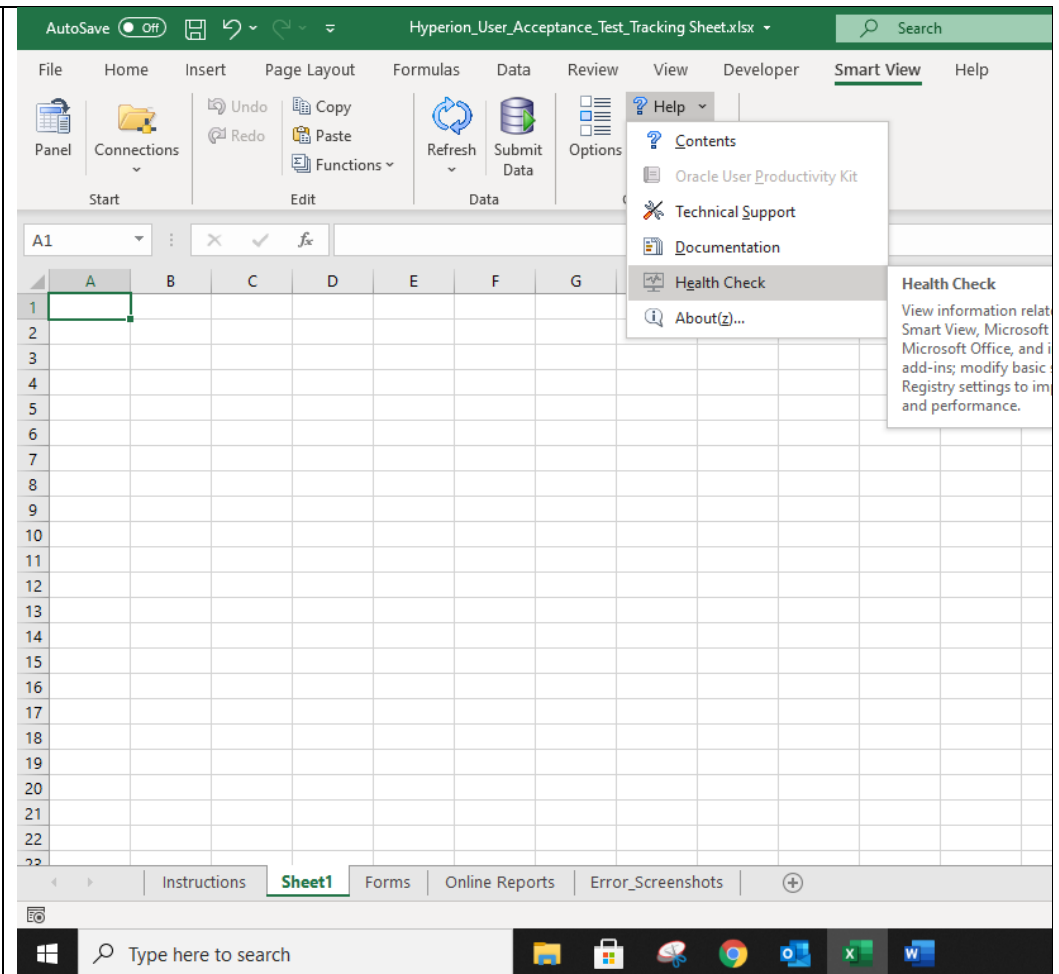
18. Select Save as Default Options



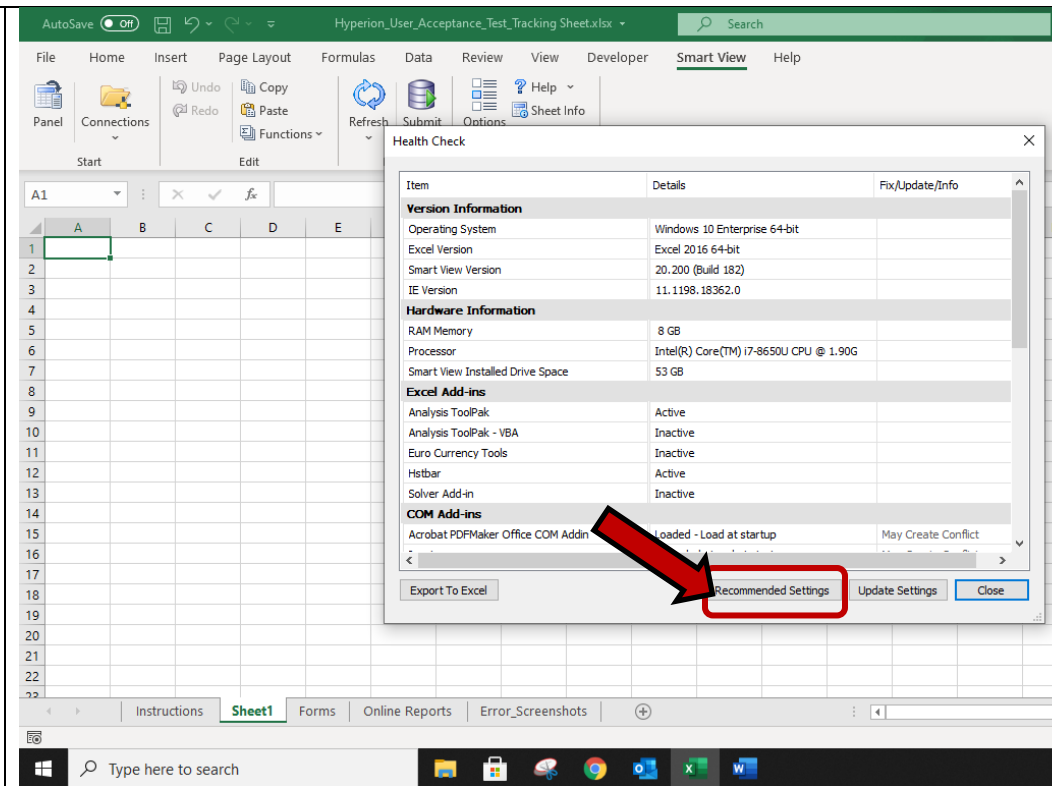
19. The SmartView Options window closes. Click the **Help dropdown button** in the SmartView Ribbon



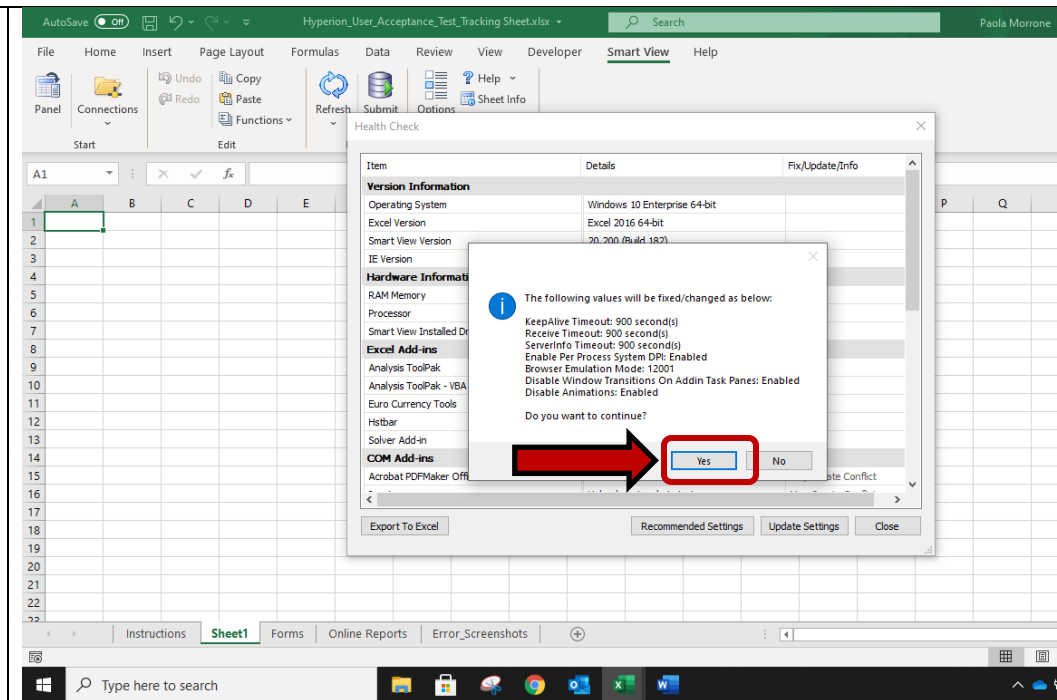
20. A submenu opens, select **Health Check**



21. A Pop-up opens. Click the **Recommended Settings Button**



22. Click OK on the pop-up, Click the Yes button



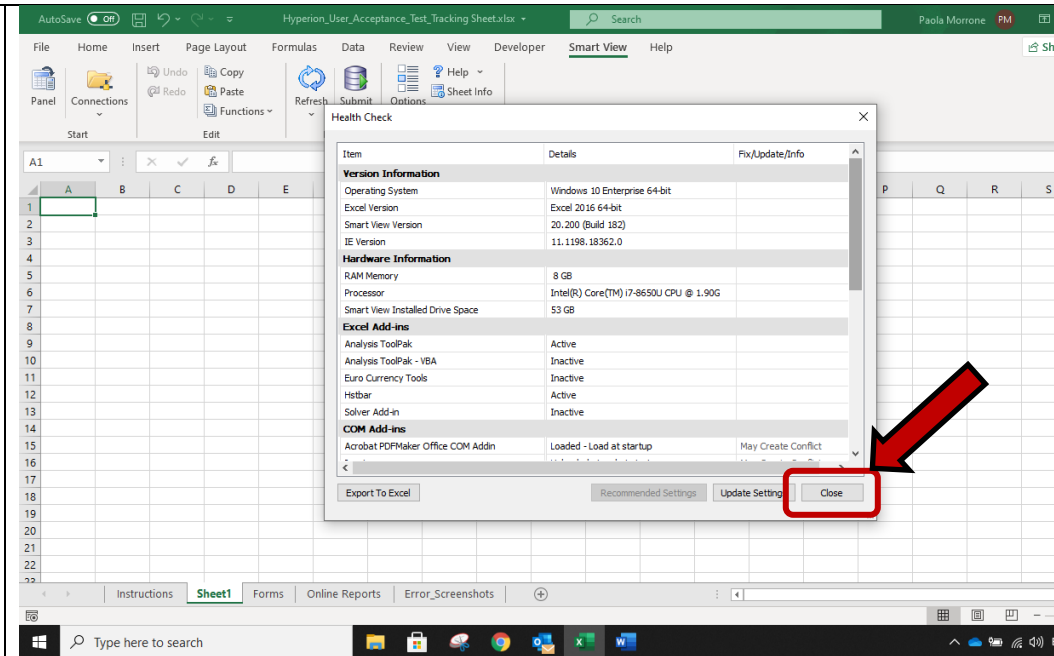
23. Scroll down to **Registry Information** and then the **KeepAlive Timeout** field and to the far right of the field select Default and type in **1800** as shown in the image and then click **Update Settings**

Health Check

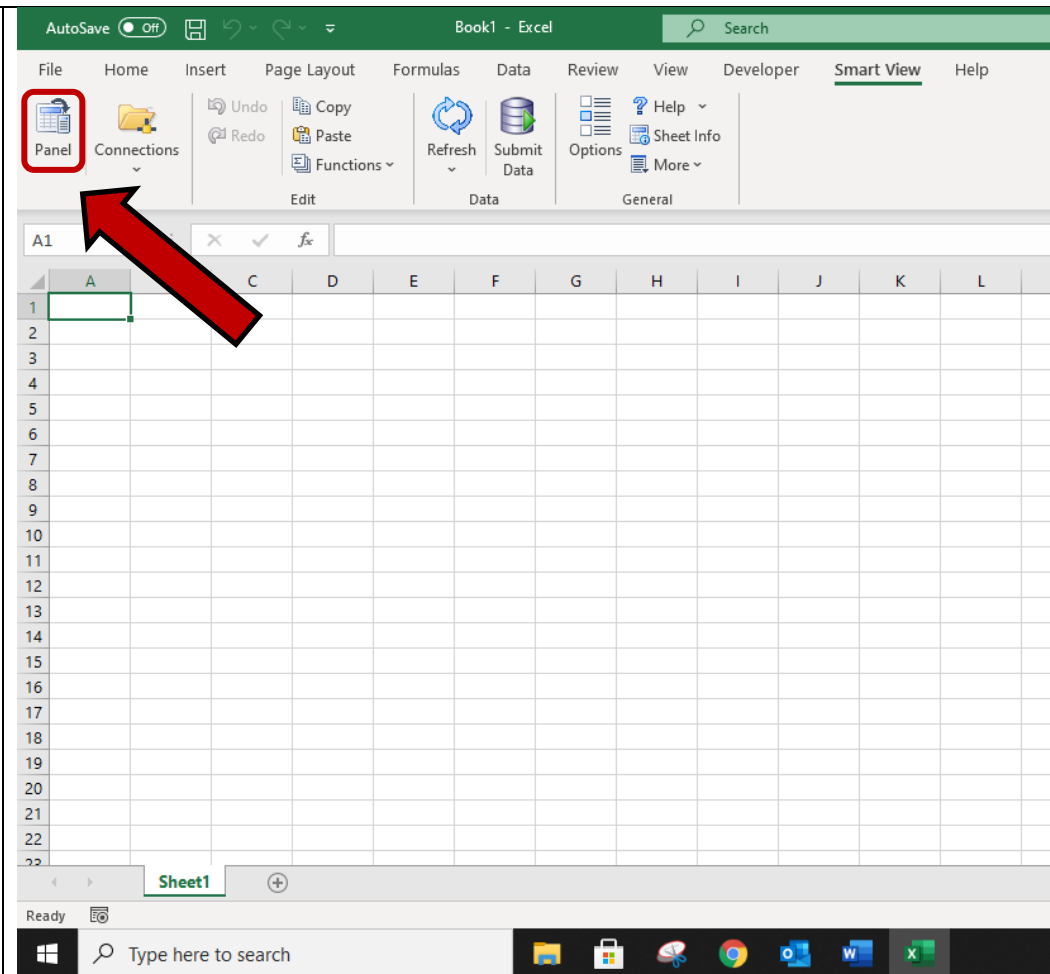
| Item | Details | Fix/Update/Info |
|--|----------------------------|------------------------------|
| COM Add-ins | | |
| Inquire | Unloaded - Load at startup | May Create Conflict |
| Microsoft Data Streamer for Excel | Unloaded - Load at startup | May Create Conflict |
| Microsoft Power Map for Excel | Unloaded - Load at startup | May Create Conflict |
| Microsoft Power Pivot for Excel | Unloaded - Load at startup | May Create Conflict |
| Oracle Smart View for Office | Loaded - Load at startup | No Impact |
| Registry Information | | |
| KeepAlive Timeout | 900 second(s) | 1800 |
| Receive Timeout | 900 second(s) | Default |
| ServerInfo Timeout | 900 second(s) | Default |
| Current Resolution | 1920 x 1080 | Not a 4K system |
| USER Process Handle Quota | 10000 | Number of user objects |
| Enable Per Process System DPI | Enabled | Default |
| Browser Emulation Mode | 12001 | Default |
| Smart View Options | | |
| Undo Buffer | 9 | Enter input between 1 to 100 |
| Improve Metadata Storage | Checked | Default |
| WebView2 Runtime | Disabled | Default |
| Graphic Setting - May Cause Flickering | | |
| Disable Window Transitions On Addin Task Panes | Enabled | Default |
| Disable Animations | Enabled | Default |

Export To Excel Recommended Settings Update Settings Close

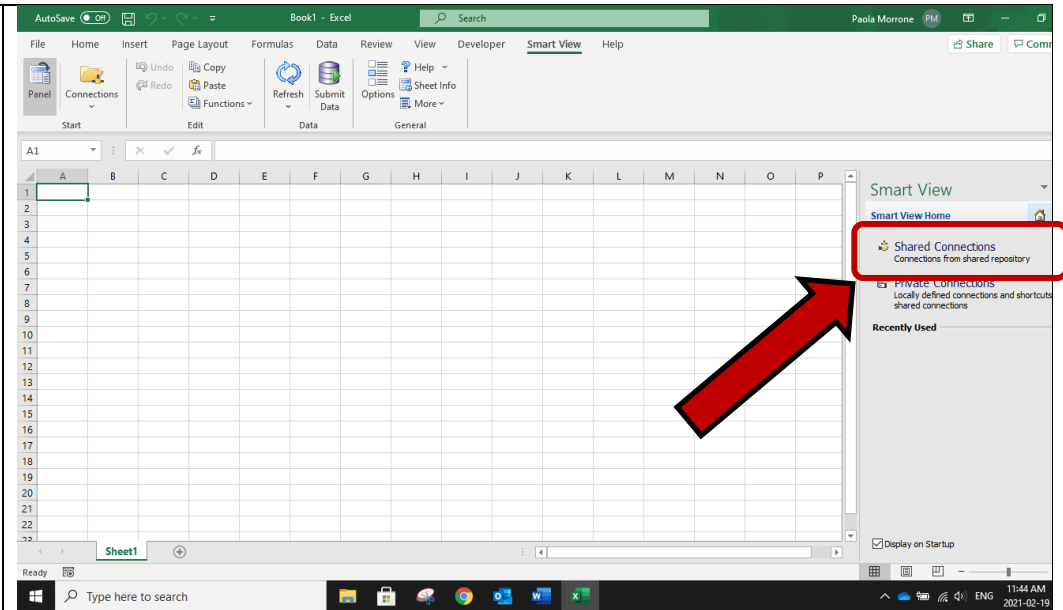
24. The pop-up closes. Click the Close Button



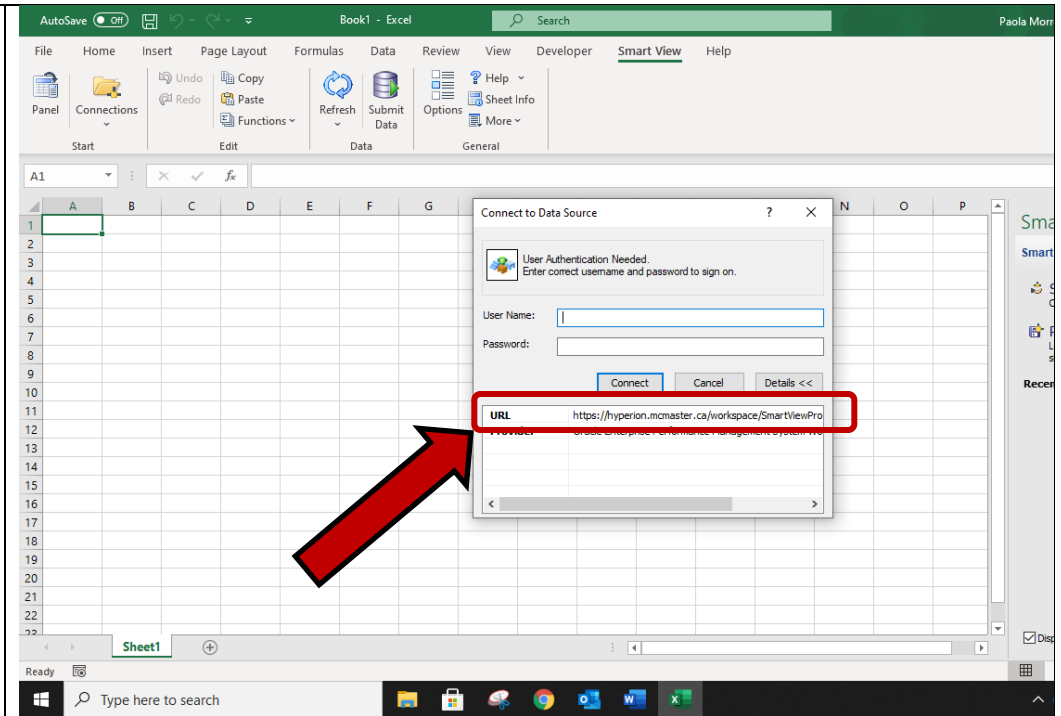
25. The SmartView Health Check window closes.
Click the SmartView Panel button on the
Ribbon



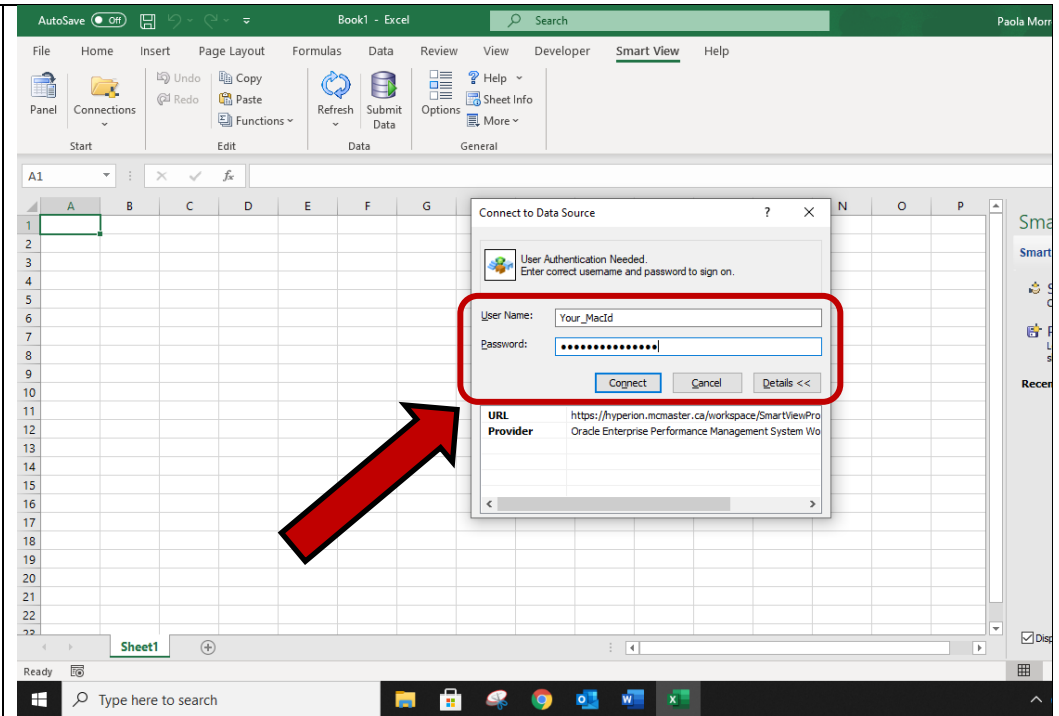
26. Click Shared Connections on the SmartView Panel



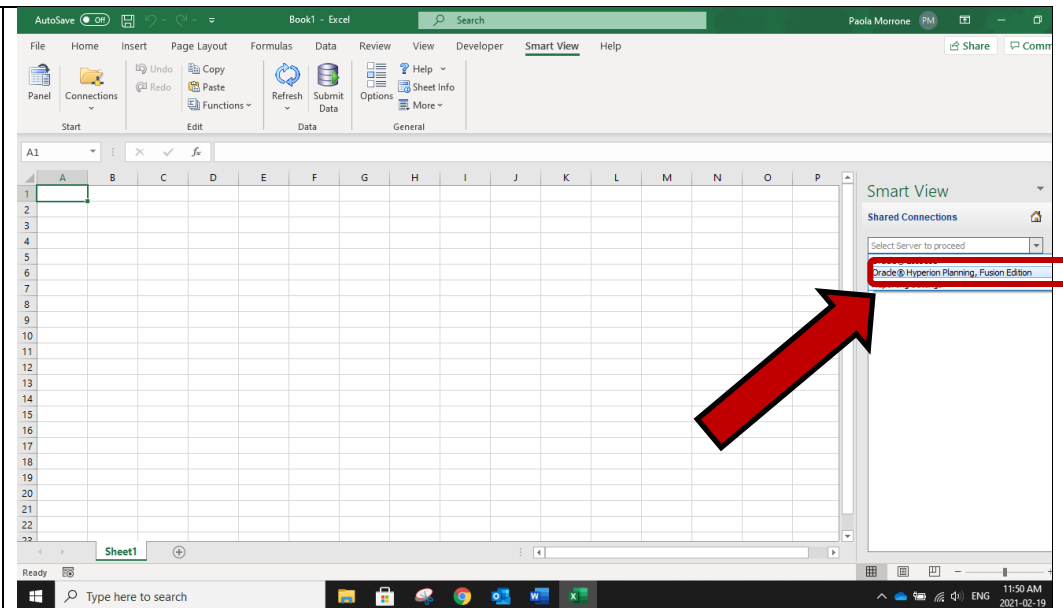
27. Check that URL in the popup is:
<https://hyperion.mcmaster.ca/workspace/SmartViewProviders>



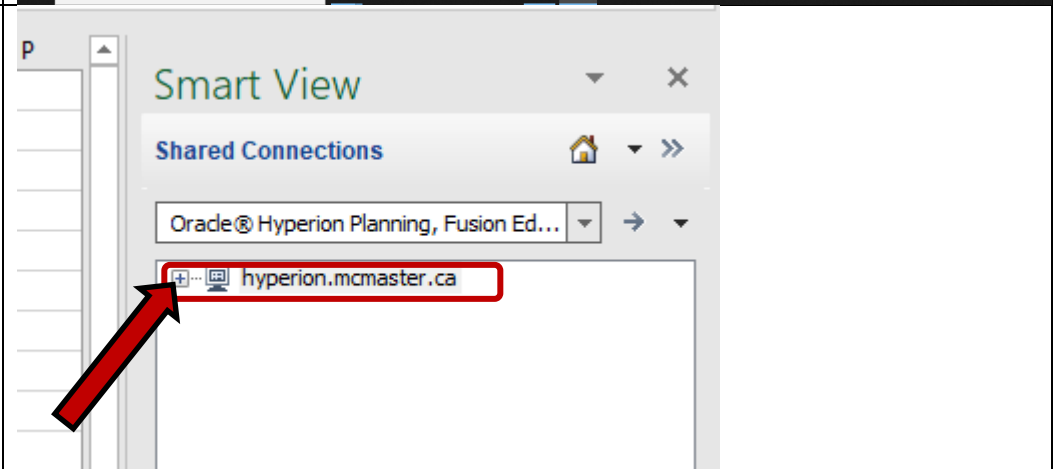
28. Enter MacId and password, Click Connect



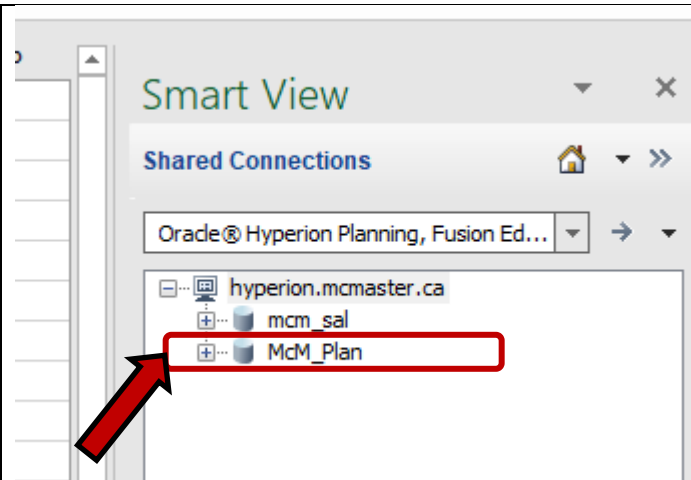
29. On the Panel, click on the Dropdown labeled “Select Server to Proceed” and select the option called: **Oracle Hyperion Planning, Fusion Edition**



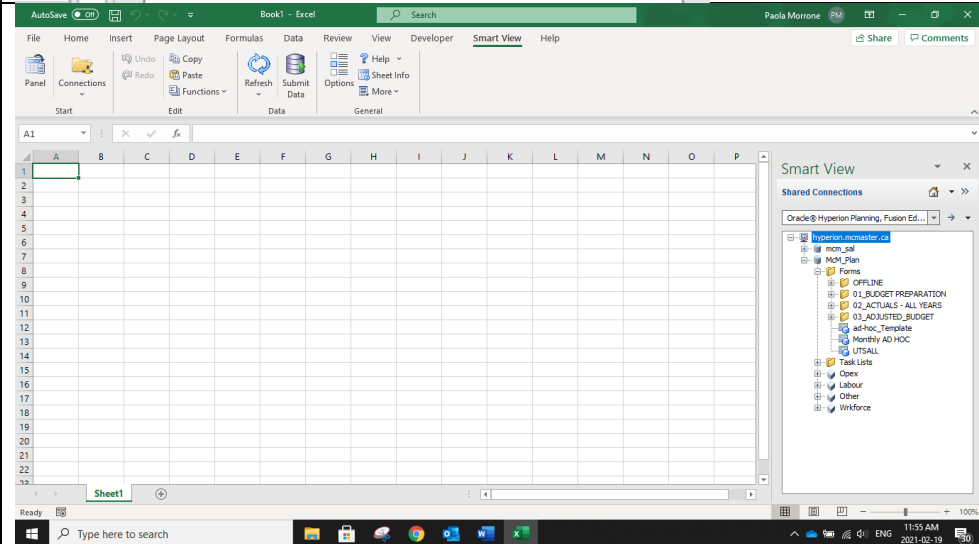
30. The hyperion.mcmaster.ca server appears on the panel. Expand by clicking on the plus (+) sign next to it



31. Expand the McM_Plan application by clicking on the plus (+) sign next to it

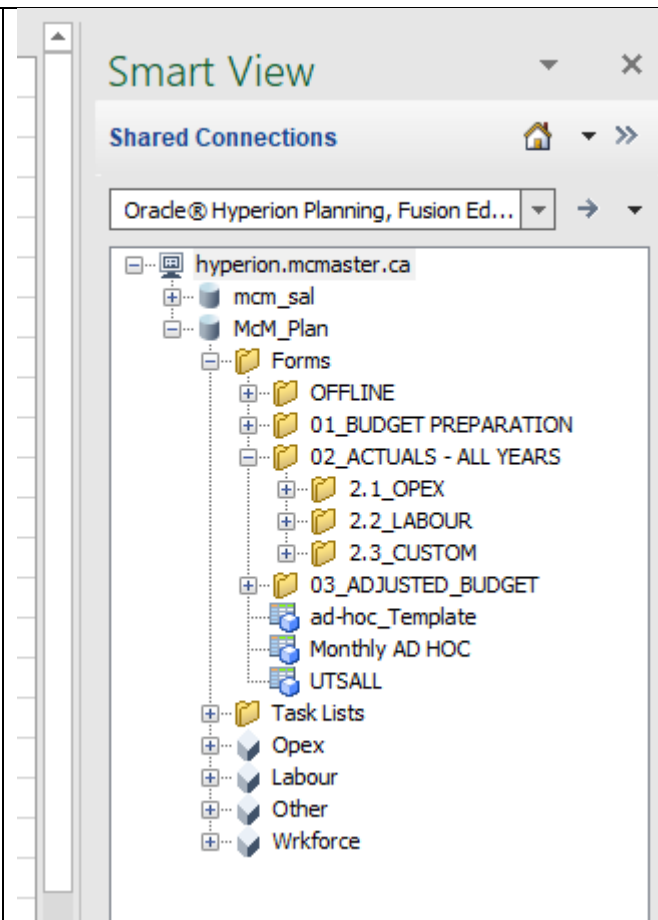


32. Validate you can browse through the forms and SmartView reports

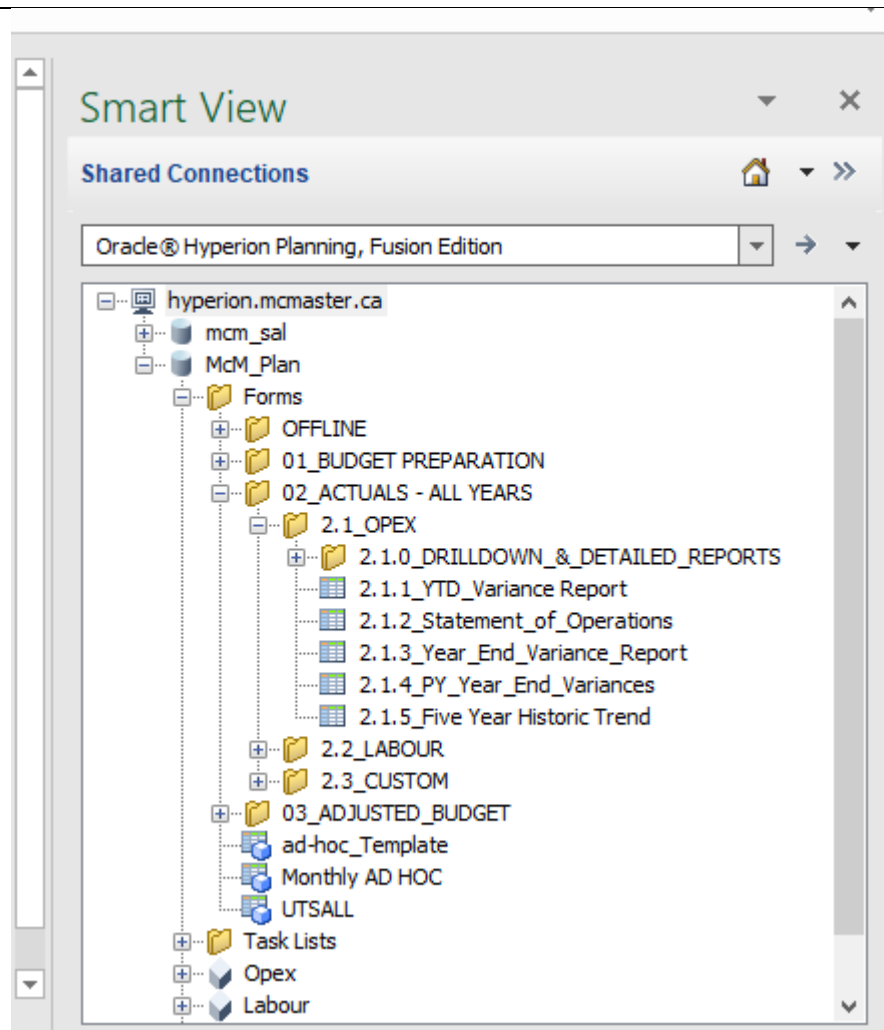


For the purpose of this document we will validate by opening the Statement of operations Report

33. Expand the folder called **02_ACTUALS - ALL YEARS**



34. Expand the Folder called **2.1_OPEX**



35. Double click on Report called
2.1.2_Statement_of_Operations and the
 report should open on the Excel Grid

AutoSave Off Book1 - Excel Search

File Home Insert Page Layout Formulas Data Review View Developer Smart View Help

Analyze Refresh POV

Ad Hoc Data Formatting Workflow

POV 2.1.2_Statement_of_Operations - hyperion.mcmaster.ca_McM_Plan_1

D_10386 FA Budgeting Services P_30000 Generic 20 Operating Fund FY21 Refresh

A1

| | A | B | C | D | E | F | G | H | I | |
|----|---------------------------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| 1 | | | | | | | | | | Actual |
| 2 | | | | | | | | | | All Type |
| 4 | | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan |
| 7 | +A_4101 Operating Allocation | -593,389 | | | | | | | | |
| 10 | +A_4111 Government Grants | | | | | | | | | |
| 15 | +A_4200 Other Revenue | | | | -3,000 | 1,500 | | | | |
| 16 | A_4000 Total Revenue | -593,389 | | | -3,000 | 1,500 | | | | |
| 17 | | | | | | | | | | |
| 27 | +A_5100 Salary and Benefits | 64,665 | 63,069 | 60,169 | 62,661 | 91,242 | 55,187 | 30,360 | 59,082 | |
| 49 | +A_5200 Non Salary Expenses | 46 | 481 | 205 | 1,216 | 196 | 1,010 | 205 | -8 | |
| 50 | A_5000 Expenses | 64,710 | 63,550 | 60,373 | 63,878 | 91,438 | 56,197 | 30,565 | 59,074 | |
| 51 | | | | | | | | | | |
| 52 | A_6000 Surplus/Deficit | -528,679 | 63,550 | 60,373 | 60,878 | 92,938 | 56,197 | 30,565 | 59,074 | |
| 53 | A_7000 Appropriation Transfers | | | | | | | | | |
| 54 | A_3000 Net Income | -528,679 | 63,550 | 60,373 | 60,878 | 92,938 | 56,197 | 30,565 | 59,074 | |
| 55 | | | | | | | | | | |
| 56 | Opening Appropriations | -16,178 | -544,856 | -481,306 | -420,933 | -360,056 | -267,118 | -210,921 | -180,356 | -180,356 |
| 57 | PS Adjustments | | | | | | | | | |
| 58 | Change in Appropriation Balance | -528,679 | 63,550 | 60,373 | 60,878 | 92,938 | 56,197 | 30,565 | 59,074 | |

Sheet1

Ready

Type here to search