Smart View for your Mac Computer
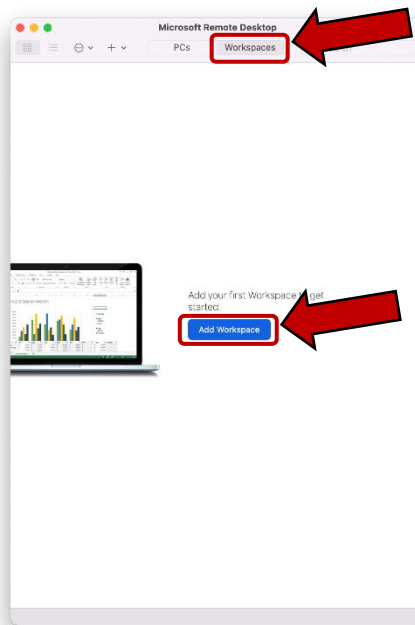
Pre-Requisites:

- **macOS 10.14 or later.**

You need to use Microsoft Remote Desktop to be able to run Smart View on your Mac.
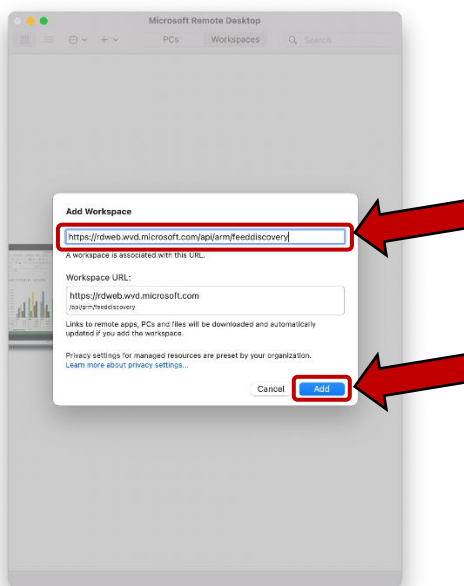
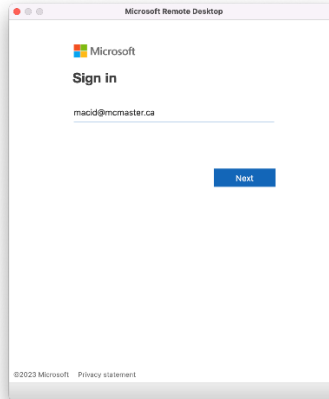Download and install Microsoft Remote Desktop from the App Store:

- https://itunes.apple.com/app/microsoft-remote-desktop/id1295203466?mt=12

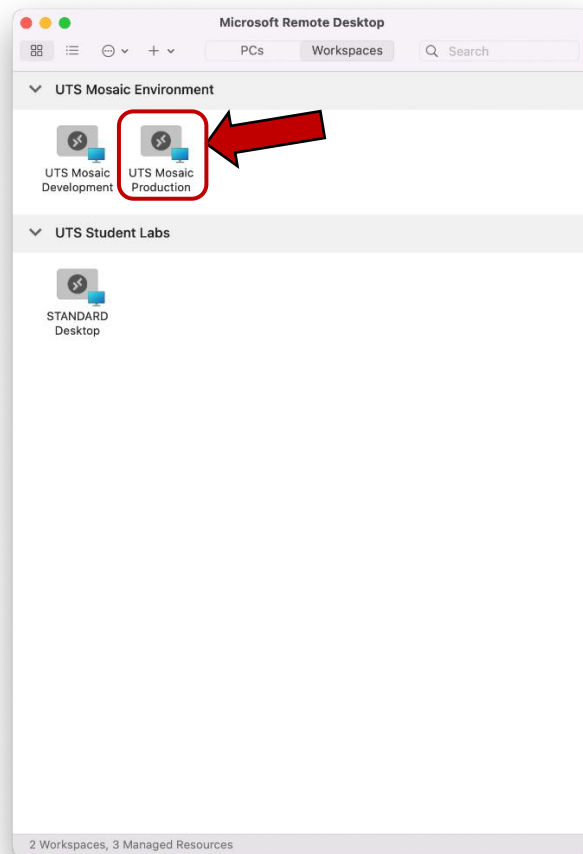|	

1. Once installed, open Microsoft Remote Desktop
  • Click on the **Workspaces** tab
  • Click **Add Workspace**	

2. Enter this URL:
  • https://rdweb.wvd.microsoft.com/api/arm/feeddiscovery
  • Click **Add**	

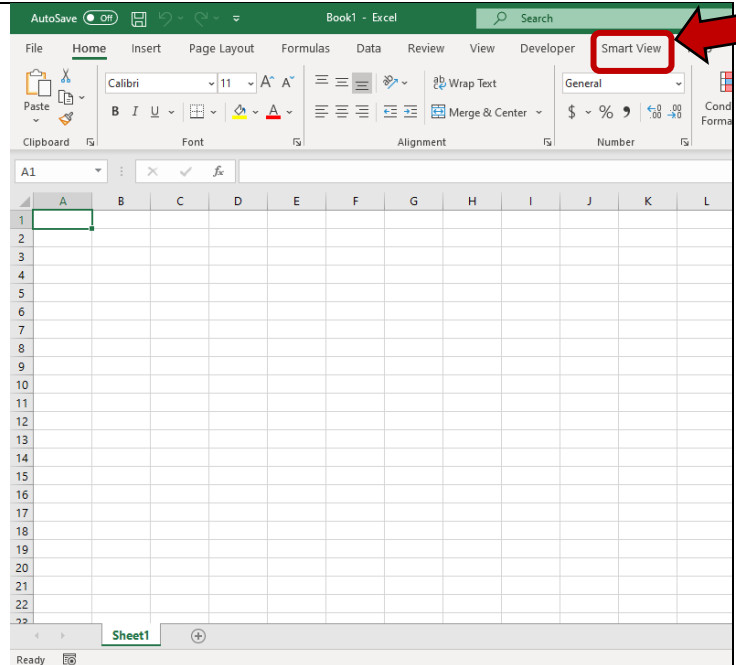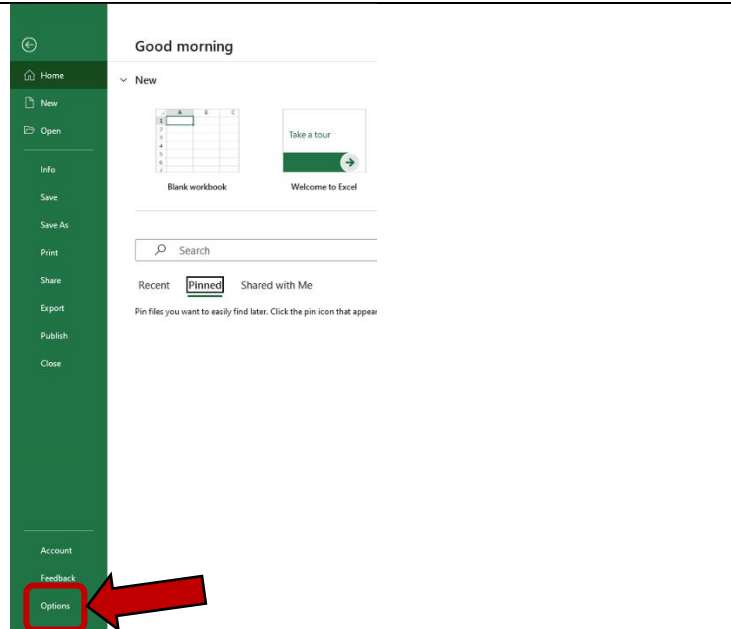|	
3. Enter your University email address (macid@mcmaster.ca), click **Next** 4. Enter your password, click **Sign In**	
5. Double-click on "**UTS Mosaic Production**" for the Mosaic Production environment	
6. Enter your University email address and password and then click on **Continue** to start the desktop	
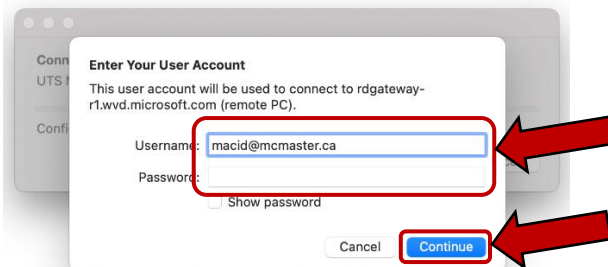
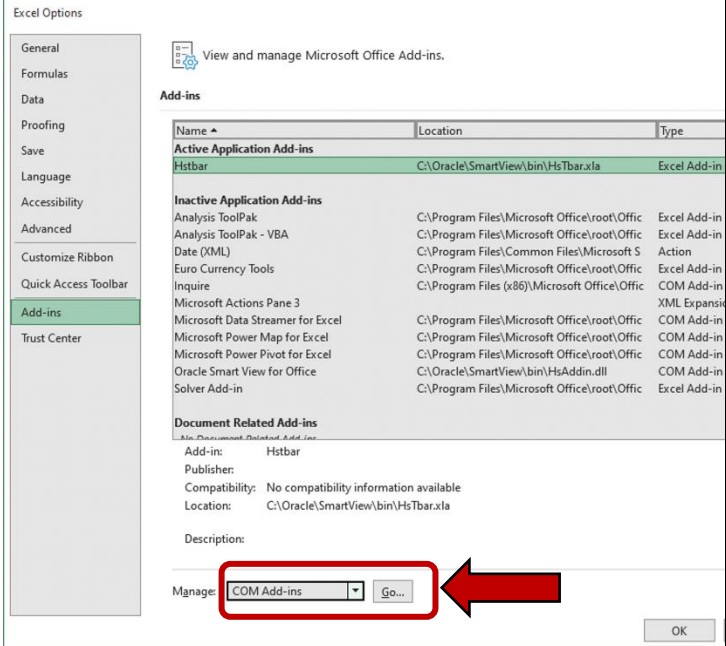|	
7. Once you are logged in an Excel shortcut will appear on your desktop • Open Microsoft Excel on your Computer and validate that the **Smart View ribbon** is displayed 8. If the **Smart View** ribbon is displayed skip to **Step 15.**	
9. If the **Smart View ribbon** is not displayed select **File** from the menu bar	
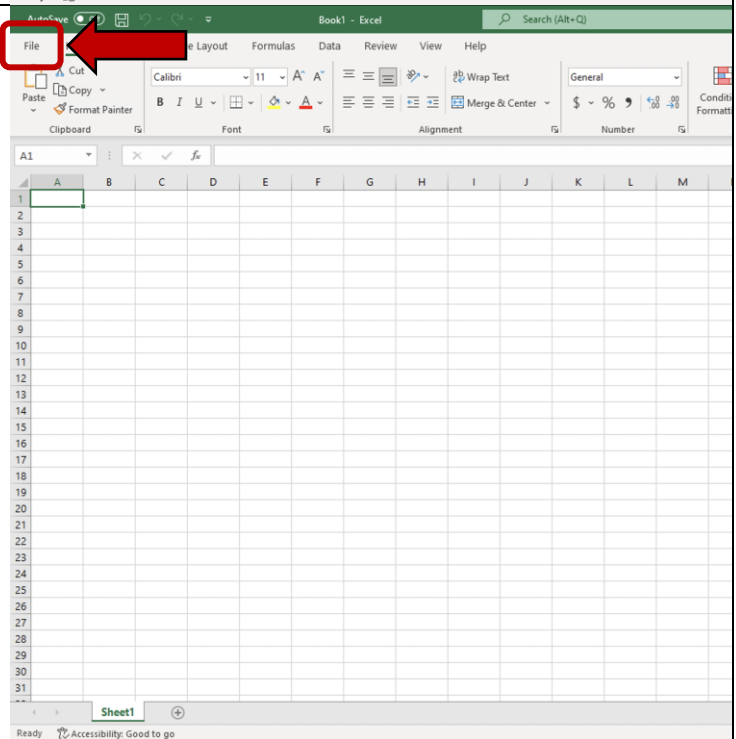
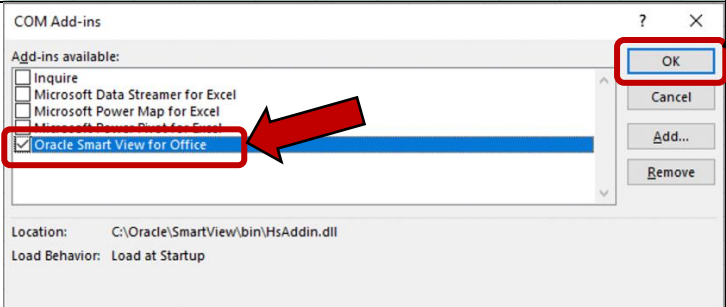|	
10. Select **Options** on the bottom left corner of Excel	
11. In the Excel Options window on the left-hand side of the column select **Add-ins**	
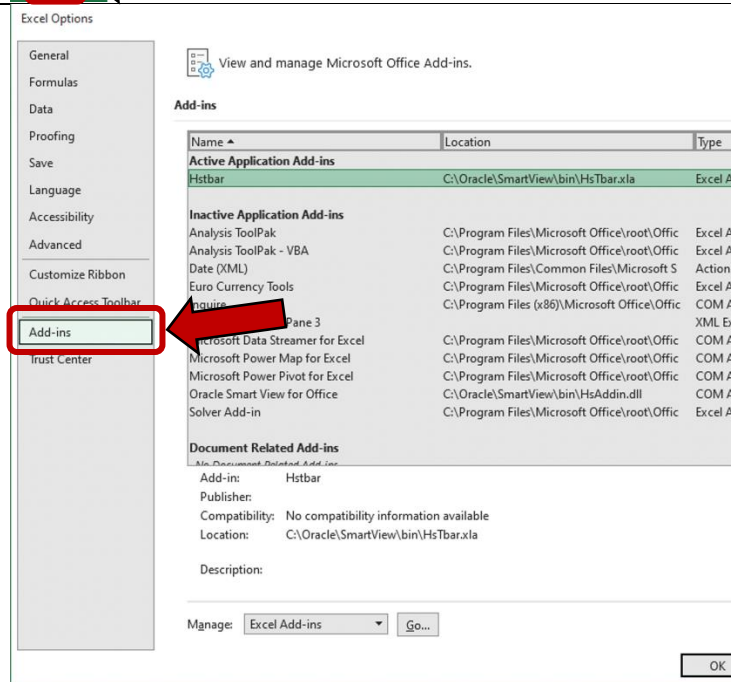
|	
12. On the bottom of the Excel Options window select **COM Add-ins from the Manage: drop-down list** and select **GO…**	
13. In the COM Add-ins window select the **checkbox for Oracle Smart View for Office** and click **OK**	
14. Then close Microsoft Excel and then reopen Excel and you should see the **Smart View** ribbon is displayed	
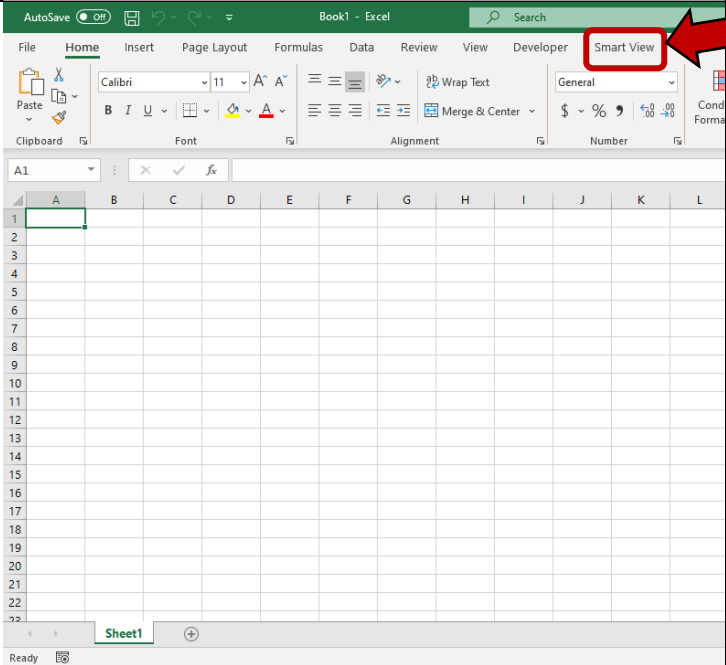
15. Click on the **SmartView Tab** and then click on **Options** to start setting up the connection to the Hyperion database
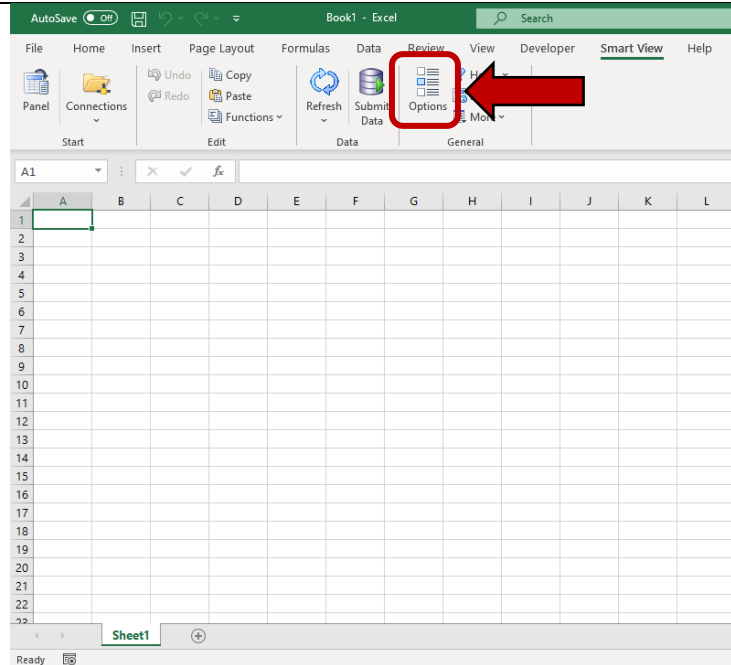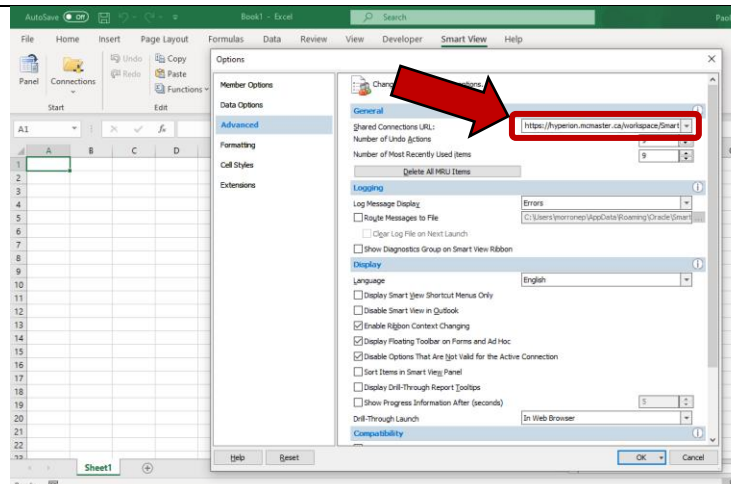

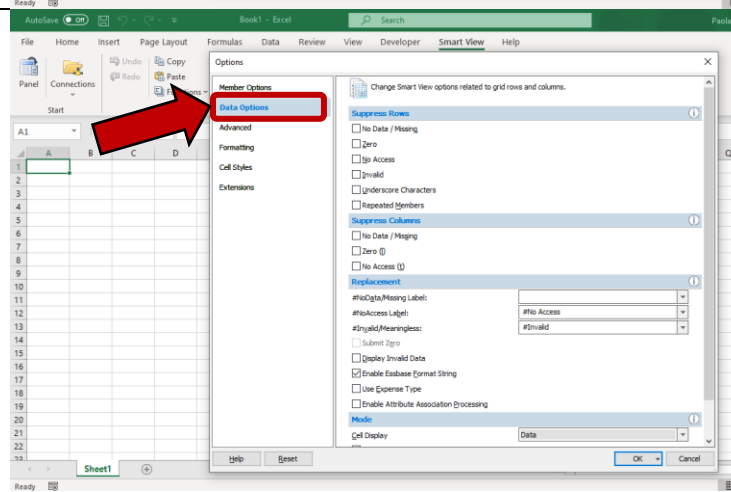16. The Smart View options Pop-Up opens. Select **Advanced**
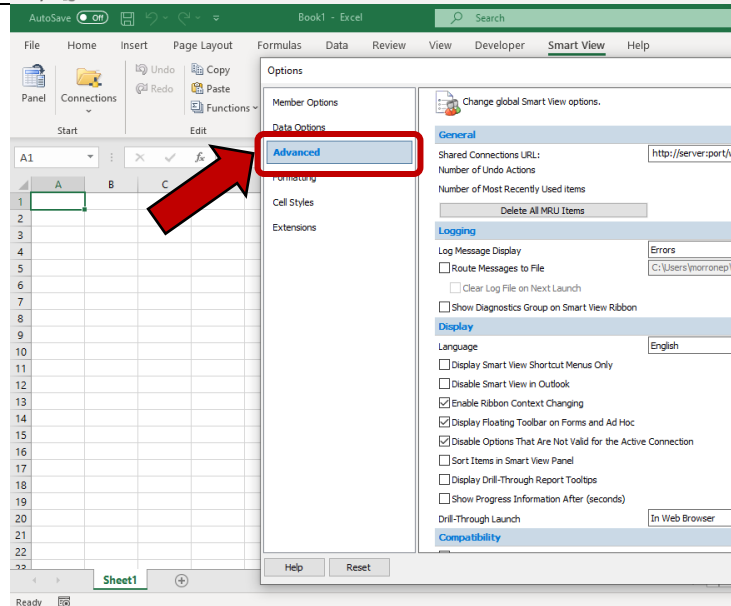
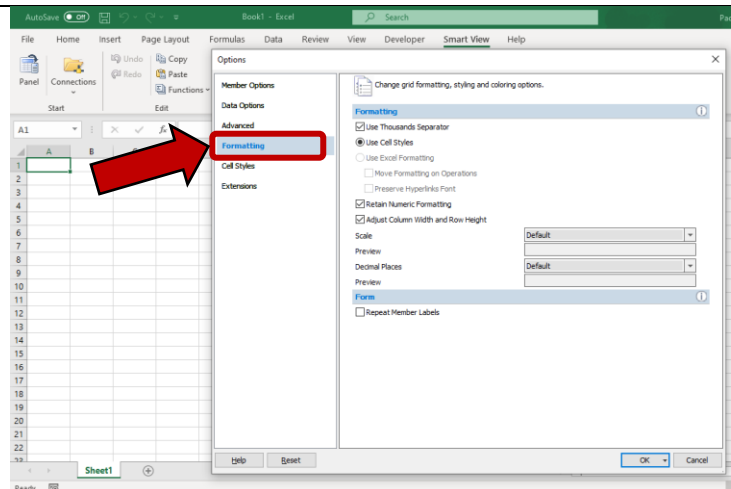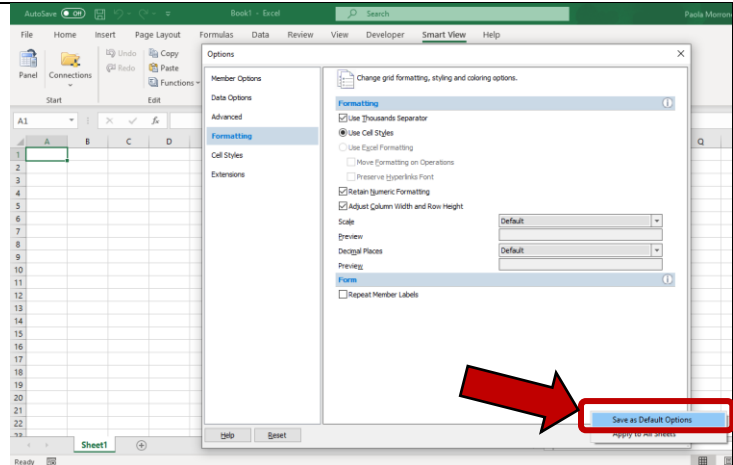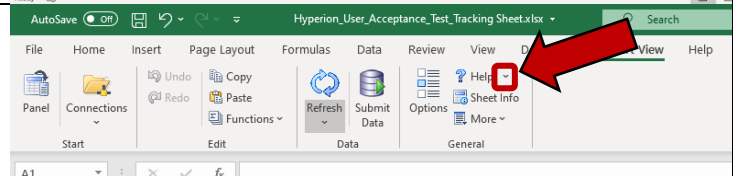|	
17. In the **Shared Connections URL** box enter: • https://hyperion.mcmaster.ca/ workspace/SmartViewProviders	
18. Click **Data Options** in the SmartView options pane • In the #NoData/ Missing Label box, select the word #Missing and delete it, leaving the box **empty** • Ensure all the check boxes under the Suppress Rows and Suppress Columns sections are **unchecked**	
19. Click on the **Formatting** option on the SmartView Options pane • 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**	
20. Click the **dropdown arrow** on the OK button	

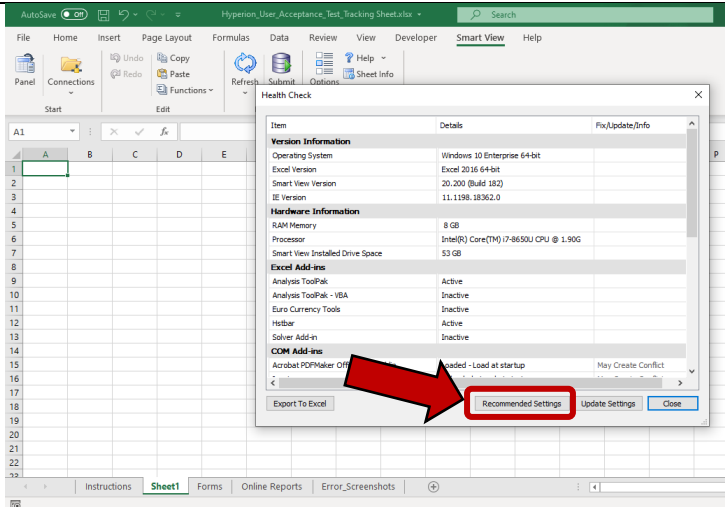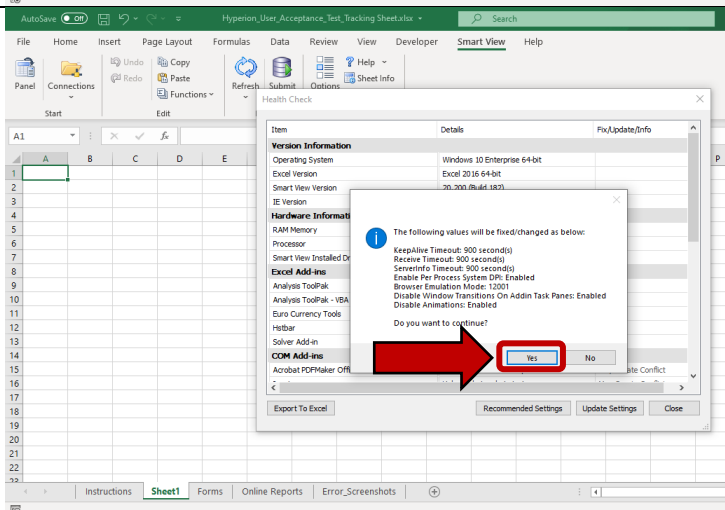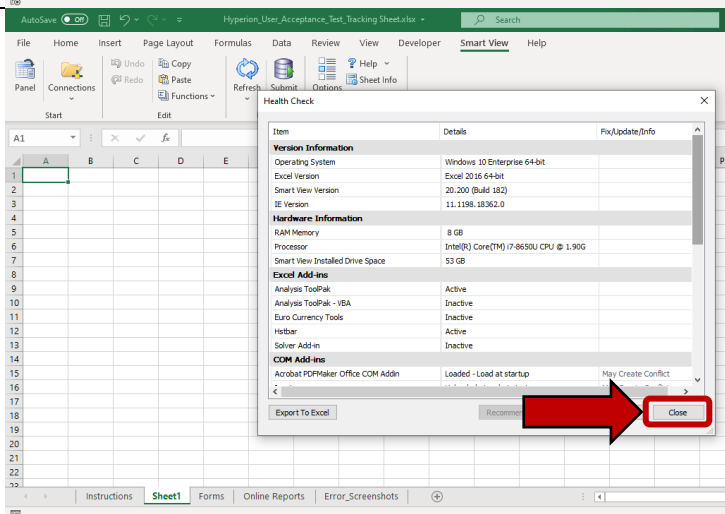|	
21. Select **Save as Default Options**	
22. The Smart View Options window closes. Click the **Help dropdown button** in the Smart View Ribbon	
23. A submenu opens, select **Health Check**	
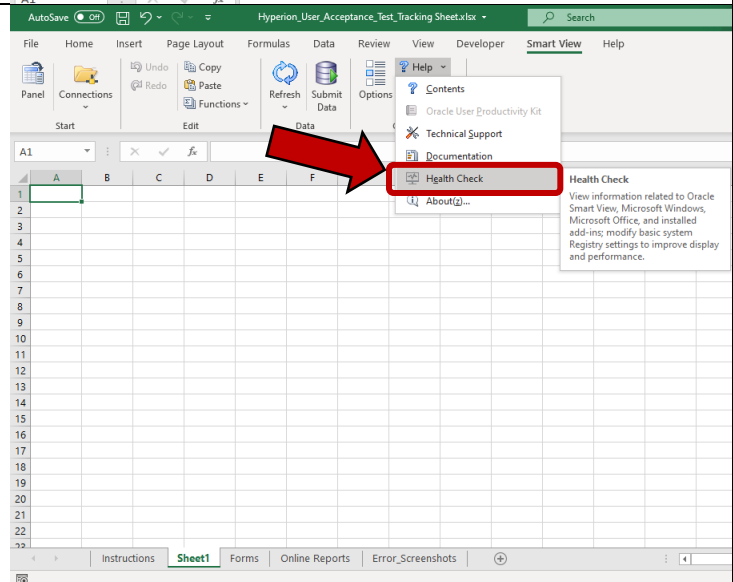
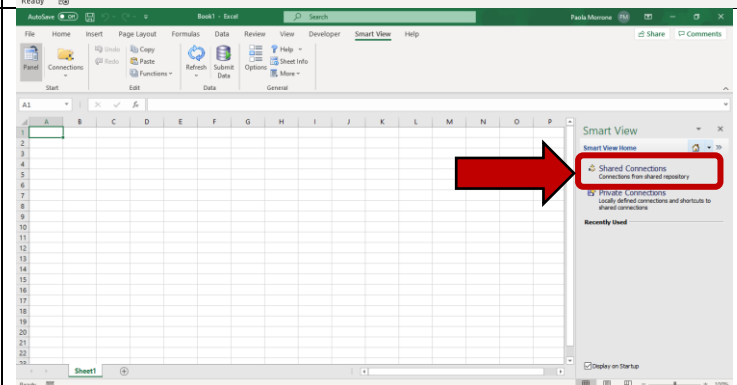|	
24. A Pop-up opens. Click the **Recommended Settings** Button	
25. Click **OK** on the POP-up, Click the **OK** button	
26. The pop-up closes. Click the **Close** Button	

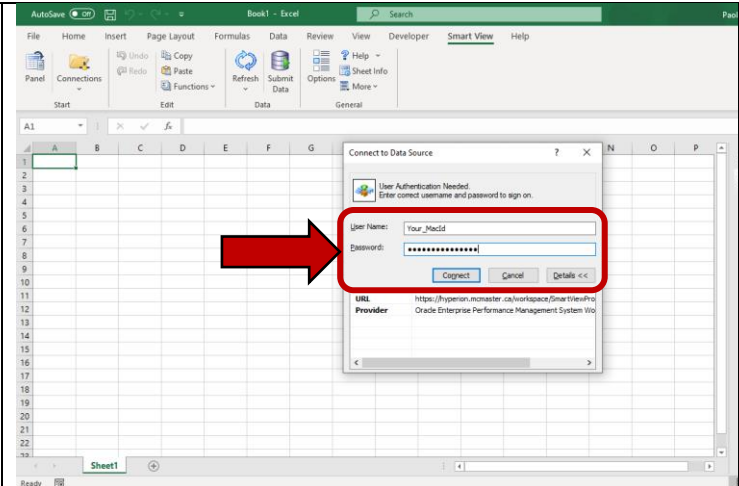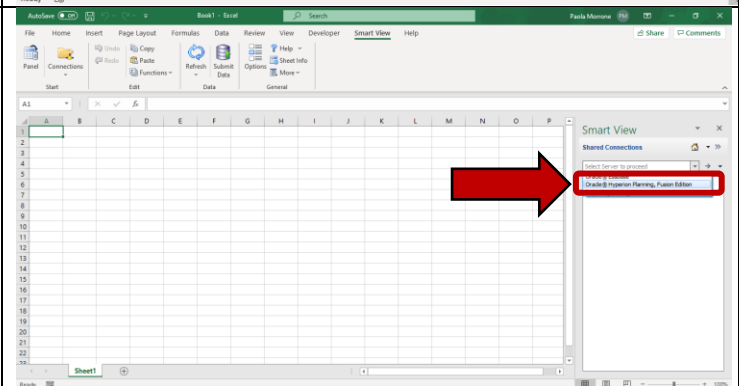|	
27. The Smart View Health Check window closes. Click the **Panel** button on the Smart View Ribbon	
28. Click **Shared Connections** on the Smart View Panel	
29. Check that URL in the popup is: https://hyperion.mcmaster.ca/workspace/SmartViewProviders	
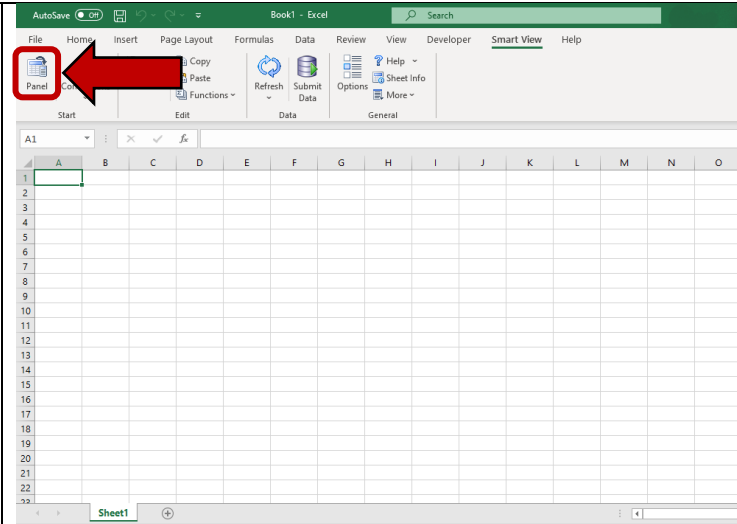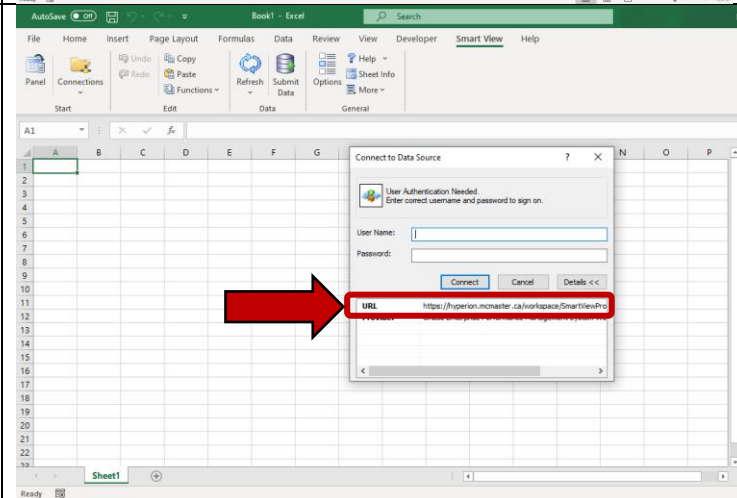
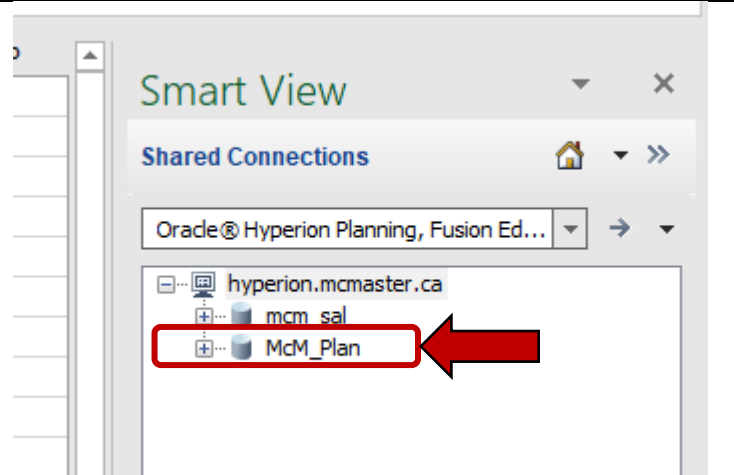|	
30. Enter MacID and password, Click **Connect**	
31. On the Panel, click on the Dropdown labeled "Select Server to Proceed" and select the option called: **Oracle Hyperion Planning, Fusion Edition**	
32. The hypreion.mcmaster.ca server appears on the panel. Expand by clicking on the plus **(+)** sign next to it	
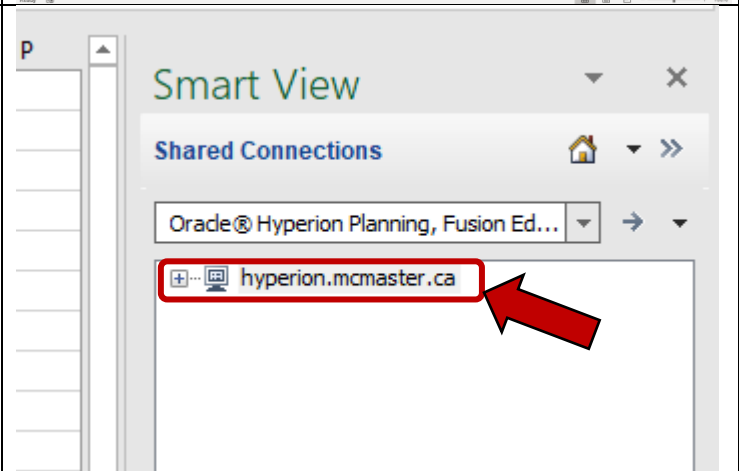
33. Expand the McM_Plan application by clicking on the plus **(+)** sign next to it	
34. To validate you can browse through the forms and Smart View reports	