

Hyperion Training Activity Sheet

HYP2: SMART VIEW

For use in training. Last updated January 22, 2019.

Smart View	1	One-time setup
	2	Change ERN amount for Café Plan Cash
	3	Add an end date to stop an Additional Earning
	4	Change Unemployment Insurance rate
	5	Add default object codes
	6	Change position name on the M_New Position form

Smart View

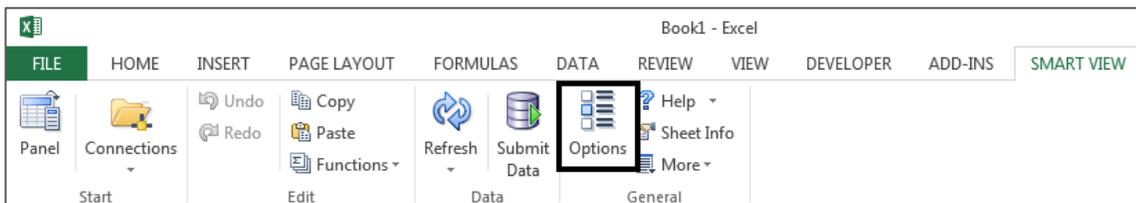
Activity 1: One-Time Setup

Directions: Enter these values for your one-time setup in the lab.

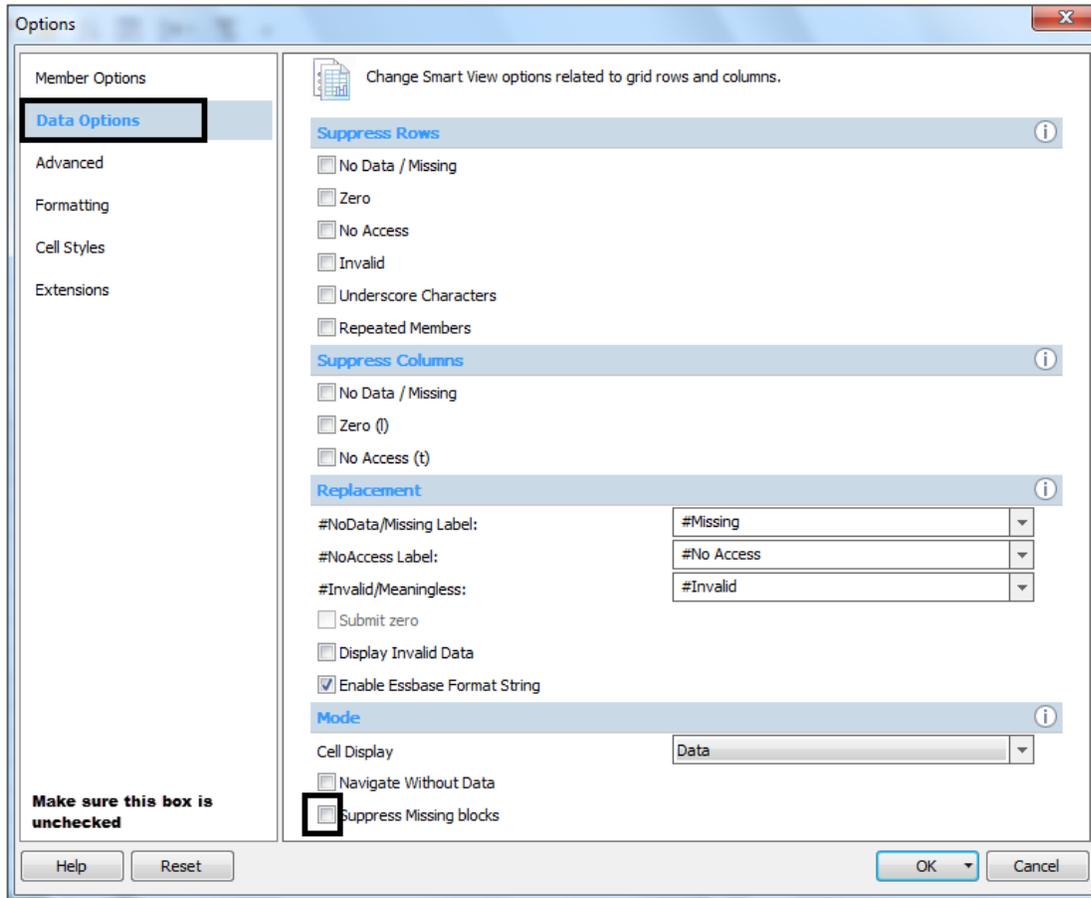
1. Open Excel.
2. Click on the **Smart View** tab.



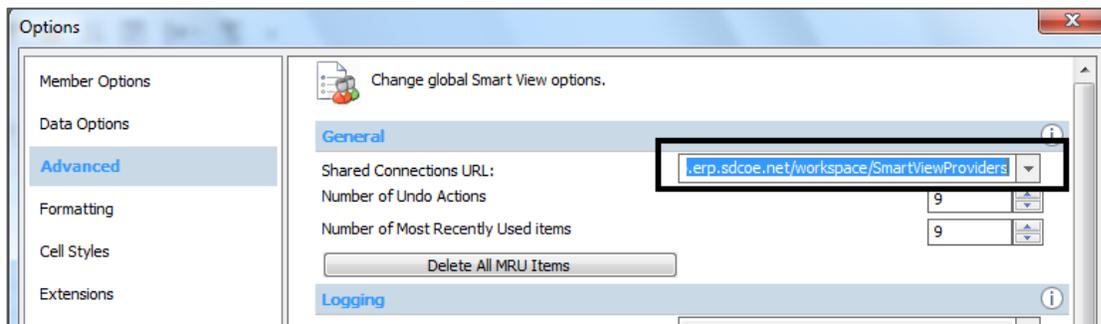
3. Click Options.



4. Click Data Options. Make sure the 'Suppress Missing blocks' box is **NOT** checked.

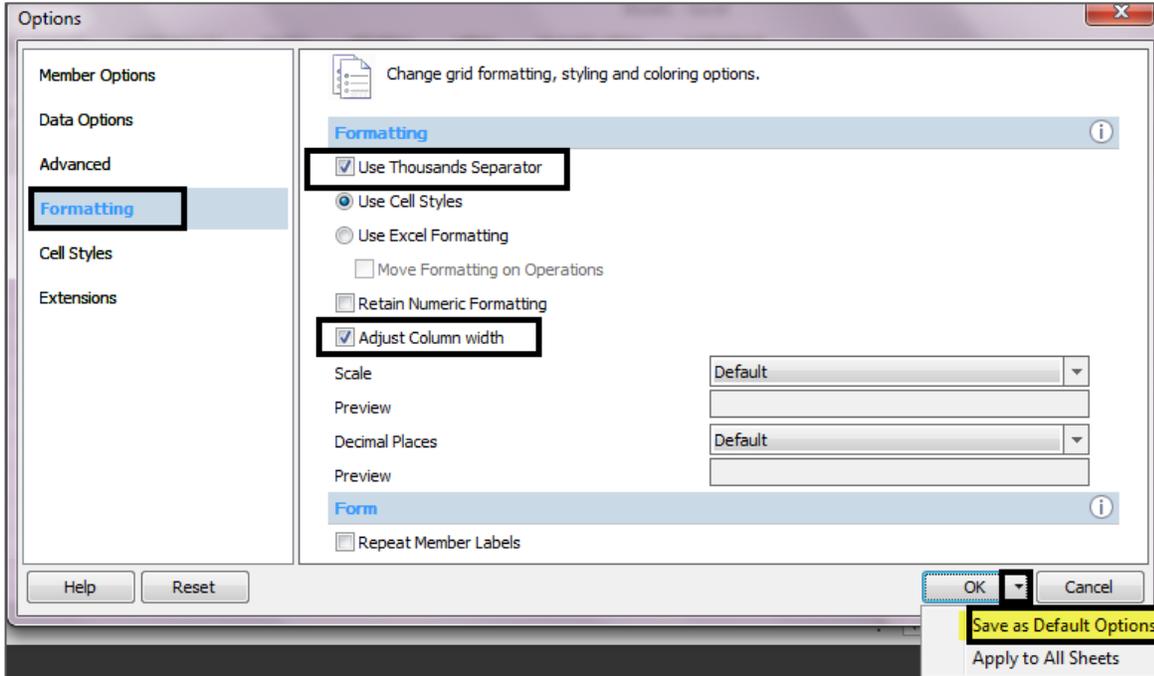


5. Click **Advanced**.
6. Enter the Hyperion Workspace URL – <https://sdhyp.erp.sdcoe.net/workspace/SmartViewProviders> in the Shared Connections URL box.



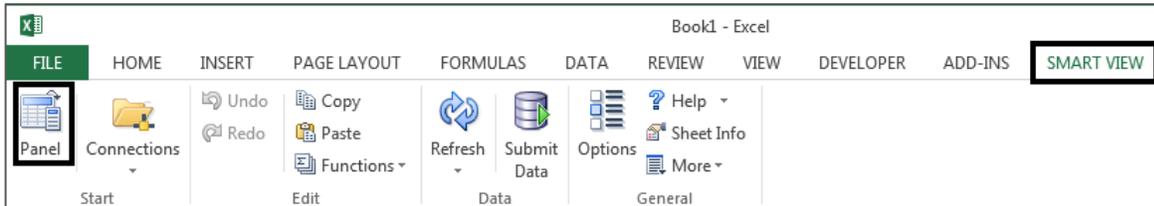
7. Click **Formatting**.
8. Mark **Use Thousands Separator** and **Adjust Column Width and Row Height** boxes.

9. Expand the drop down arrow on the **OK** button and choose **Save as Default Options**.

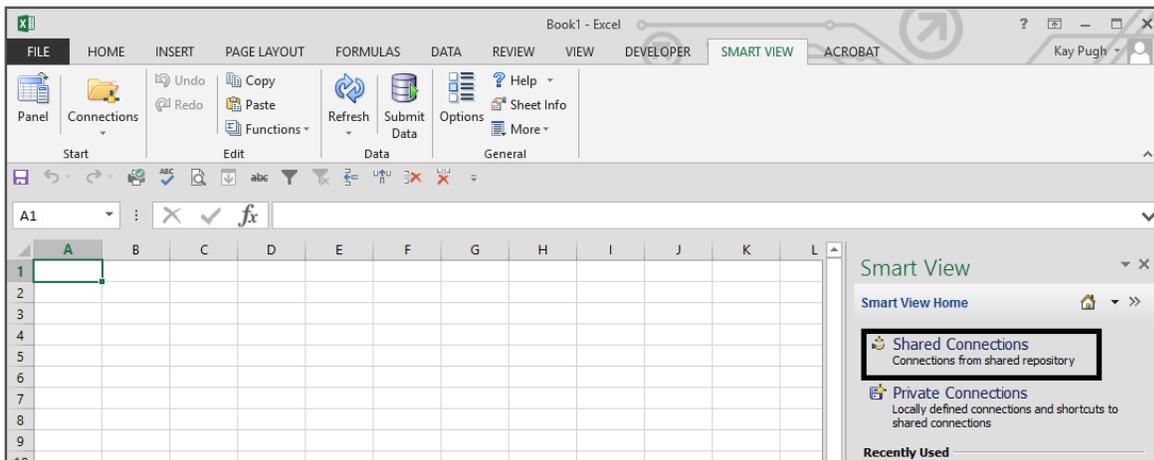


10. Click on the **Smart View** tab in the Excel Toolbar Ribbon.

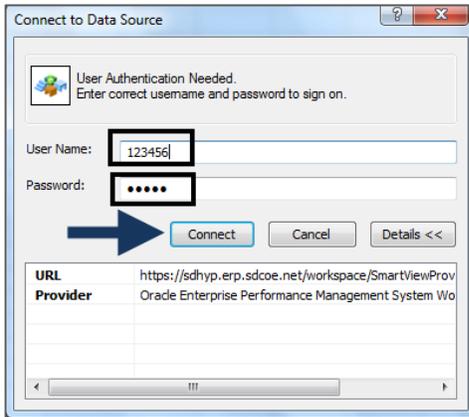
11. Click on **Panel**.



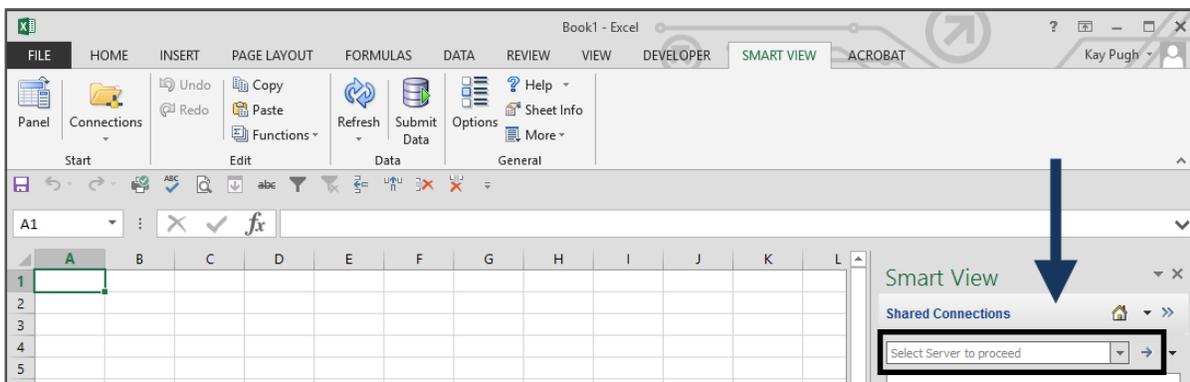
12. Click on **Shared Connections**.



13. Enter your Hyperion User Name and Password and click **Connect**.



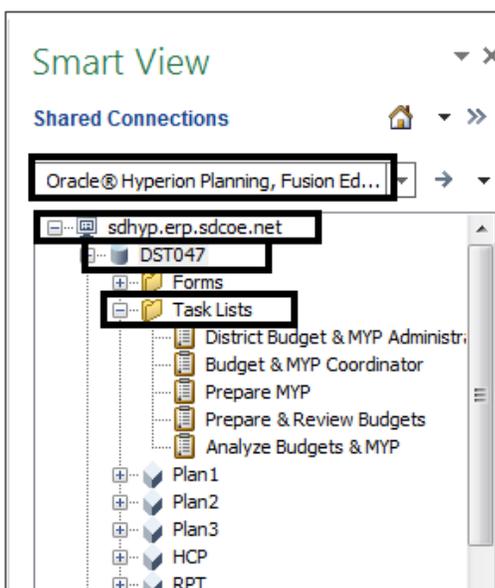
14. From the "Select Server to proceed" dropdown menu, select **Oracle Hyperion Planning, Fusion Edition**.



15. Expand **sdhyp.erp.sdcoc.net**.

16. Find your Application (District) and Expand the + sign to view your Forms and Task Lists.

17. Expand **Task Lists** to see My Task List options. These are the same items that are in the View Pane under My Task List in the Hyperion Workspace.

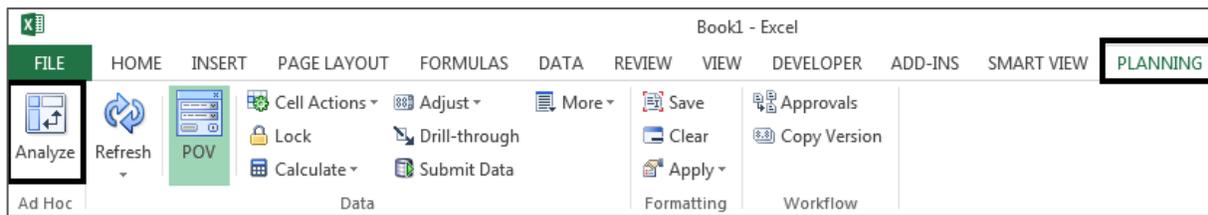


Activity 2: Change Café Plan Cash Amount (Additional Earning)

Scenario: Beginning on July 1 of the new fiscal year, the amount of the Café Plan Cash program will change for all participating employees. We can update all employees at once in Smart View rather than one at a time in Hyperion.

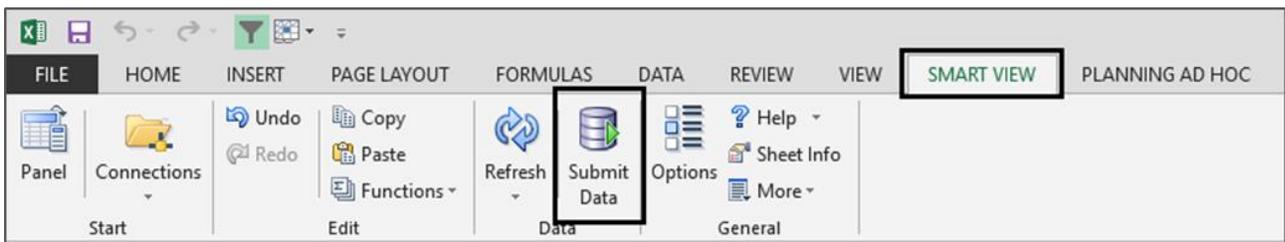
Steps: **Open Excel > Smart View Tab > Panel > Oracle Hyperion Planning, Fusion Edition > choose your application > choose your form**

- Navigate to: **Forms > LEA > HCP Data View > M_EMPCOMPINFO_ERN**
 - This shows the same information as the form does in the Hyperion workspace.
- Click on the **Planning** tab on the toolbar and then click on the **Analyze** button.



This opens a second sheet with the same information as on sheet 1, in a different format.

- On **Sheet 2**, highlight Row 5 and turn on **Filters**.
- Expand all columns.
- Filter **Column D** for ERN-CFC-2.
- In **Column K**, change the Override Option Value to a new value and enter. You will see that the cell changes to a darker yellow color.
- To copy the values down, select cell K11, then hold down **Ctrl + Shift + Down Arrow** to select the rest of the column.
- Go to the **Home** tab and select Fill > Down. This will paste the new value to only the selected cells. Check that the cells have changed to the darker yellow color.
- Go back to the **Smart View** tab and click the *Submit Data* icon. This will submit the changes to Hyperion.



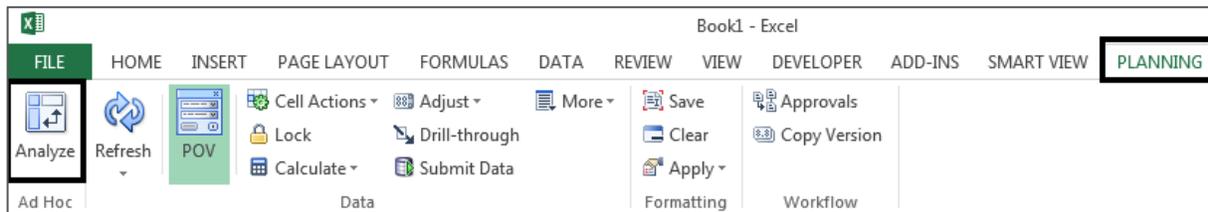
- Make a note of one of the employees that was affected by the change: Site: _____ Empl ID: _____
- Close Excel without saving.
- If you'd like, you can log into Hyperion and check to see that the data has been updated. You will need to be sure and run the Business Rules at the end of the day, but you can also run **Calculate Compensation Expense** to see the changes in the Expense section of the **Maintain Employees by Position** screen.

Activity 3: Add an end date to discontinue an additional earning

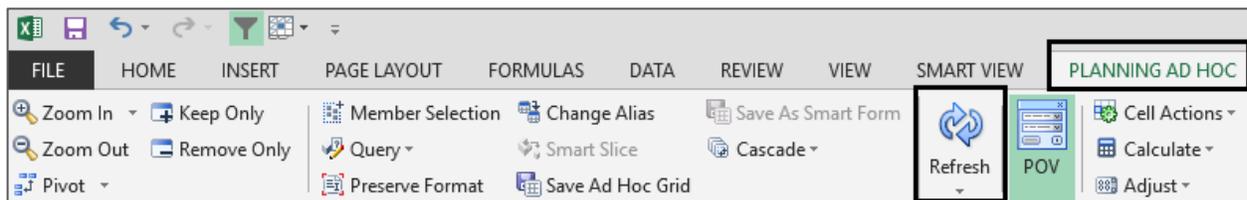
Scenario: Beginning on January 1st, mileage rates will be added to salary. So we need to put an Option End Date for all employees that currently get a separate mileage reimbursement rate.

Steps:

- Open Excel and log back into Hyperion through Smart View.
 - How much simpler was this now that the Options have already been set? _____
 - Was your district located in the same place in the connections list? _____
- Navigate to: **Forms > LEA > HCP Data View > M_EMPCOMPINFO_ERN**
- Click on the **Planning** tab on the toolbar and then click on the **Analyze** button.

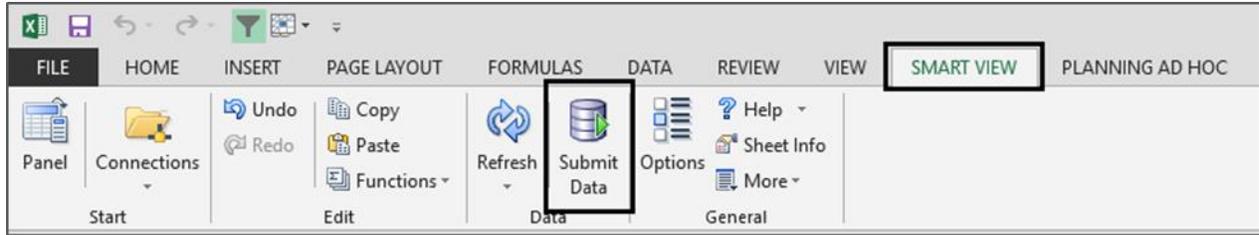


- This opens a second sheet with the same information as on sheet 1, in a different format.
- On **Sheet 2**, highlight Row 5 and turn on **Filters**.
 - Filter **Column D** for ERN-ATO-1.
 - Where do we need to enter the Option End Date? _____
 - Do you have a column for that? _____ If not, why not? _____
 - Select **Column M** and right-click to insert a column. **NOTE:** It might not be Column M for your district.
 - Select and copy cells **L1-L5**. Paste into cells **M1-M5**.
 - Rename cell **M1: Option End Date**.
 - Click **Refresh**.



- What happened when you Refreshed the screen? _____
- In **Column M**, change the Option End Date to 12/31/XX and enter. You will see that the cell changes to a darker yellow color.
 - To copy the values down, select cell **M1**, then hold down **Ctrl + Shift + Down Arrow** to select the rest of the column.
 - Go to the **Home** tab and select Fill > Down. This will paste the new value to the selected cells. Check that the cells have changed to the darker yellow color.

- Go back to the **Smart View** tab and click the Submit icon. This will submit the changes to Hyperion.



Activity 4: Change Unemployment Insurance Rate

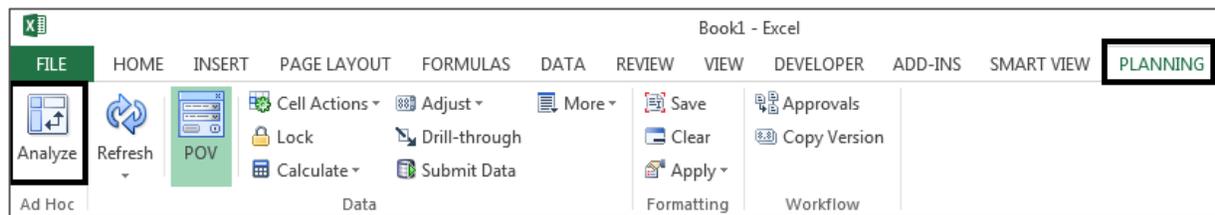
Scenario: As of July 1st, the Unemployment rate will change for your district. There is not one place in Hyperion to adjust the rate and have it affect all employees. Without Smart View, you would need to change all employees one at a time.

Steps:

- Navigate to: **Forms > LEA > HCP Data View > M_EMPCOMPINFO_TAX**

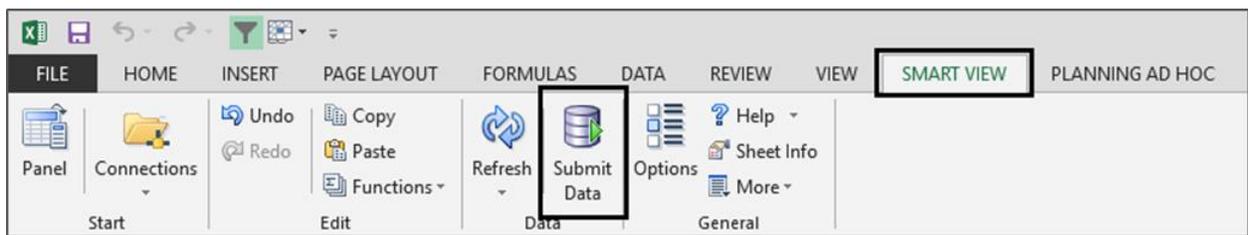
Note: If you did not close Excel between activities, then Refresh the spreadsheet with the button on the Planning tab.

- Click on the **Planning** tab on the toolbar and then click on the **Analyze** button.



This opens a second sheet with the same information as on sheet 1, in a different format.

- On **Sheet 2** (If you didn't close Excel, this number may not be "2"), highlight Row 5 and turn on **Filters**.
- Filter **Column D** for Tax-U-1.
- In **Column L**, change the Override Option Value to a new number and enter. You will see that the cell changes to a darker yellow color.
- To copy the values down, select cell L6, then hold down **Ctrl + Shift + Down Arrow** to select the rest of the column.
- Go to the **Home** tab and select **Fill > Down**. This will paste the new value to the selected cells. Check that the cells have changed to the darker yellow color.
- Go back to the **Smart View** tab and click the Submit icon. This will submit the changes to Hyperion.



Activity 5: Add default Object codes

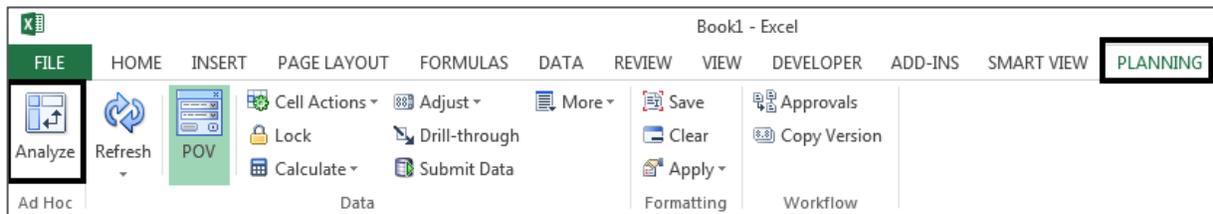
Scenario: In the next fiscal year, all Master’s stipends paid to teachers need to be tracked differently. They need to go to an object code with a sub-object. The budget should reflect this change.

Steps:

1. In the Shared Connections window, collapse the HCP Data View tab by clicking the **minus** sign. This will allow you to see the next navigation.
2. Navigate to: **Forms > LEA > HCP Defaults > M_Default Distribution Setup for Other Compensation Categories**

Note: If you did not close Excel between activities, then *Refresh* the spreadsheet with the button on the Planning tab.

3. Click on the **Planning** tab on the toolbar and then click on the **Analyze** button.

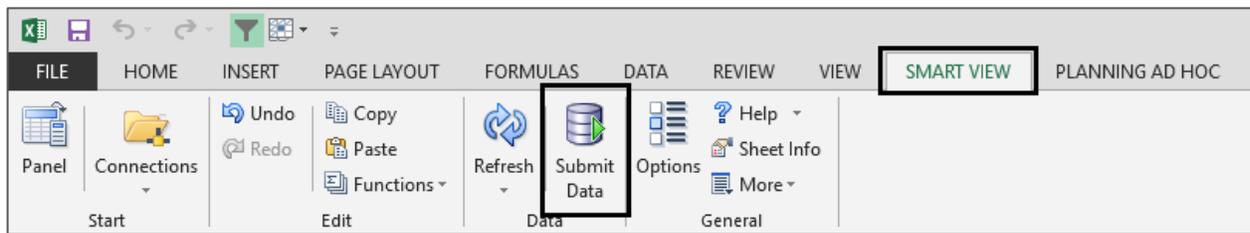


This opens a second sheet with the same information as on sheet 1, in a different format.

4. On **Sheet 2** (If you didn’t close Excel, this number may not be “2”), highlight Row 1 and turn on **Filters**.
5. What is different about the data contained on this form compared to the other forms you’ve explored? _____

 - What do you think the “**Missing...**” entries mean? _____

6. Freeze the first row. Go to the View tab, click on the Freeze Panes icon and select **Freeze Top Row**.
7. Filter **Column A** for all ERN-MAST\$-1.
8. In **Column F**, click the first active cell. A drop down will appear with the available object codes for use. Select the object code that you want to use. Like 1100003. These values can be selected individually or copied down using the fill down function.
9. Go back to the **Smart View** tab and click the Submit icon. This will submit the changes to Hyperion.



Activity 6: Change Name on M_New Position Form

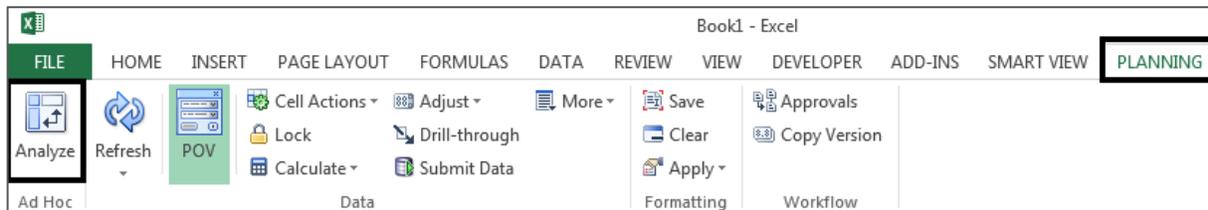
Scenario: You have reviewed the M_New Position form and decided that you would like to have a different naming convention for vacant positions. We will use Smart View to update this form.

Steps:

1. Collapse the HCP Defaults tab by clicking the **minus** sign. This will allow you to see the next navigation.
2. Navigate to: **Forms > LEA > HCP Data View > M_New Position**

Note: If you did not close Excel between activities, then *Refresh* the spreadsheet with the button on the Planning tab.

3. Click on the **Planning** tab on the toolbar and then click on the **Analyze** button.

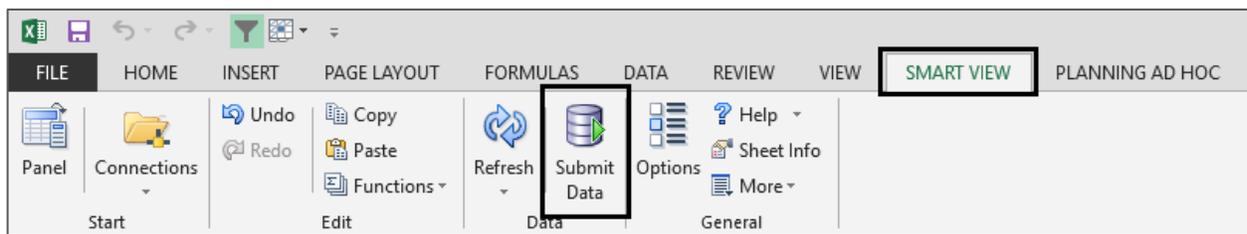


- This opens a second sheet with the same information as on sheet 1, in a different format.

4. If the list is large, you can apply filters to row 1.
5. Find the position that you'd like to change and type in the new name. The cell should change to a darker yellow once the new data has been entered.

				Position Number	Position Name
S210	Middle	New Position 2	Vacancy	2907	Teacher
S210	Middle	Pseudo_Position	Vacancy	2907	Teacher Sub
S516	Info Technology Services	New Position 3	Vacancy	5046	Director, Information Technology
S521	Instructional Programs	New Position 5	Vacancy	5030	Library Services Liaison
S536	Special Education	New Position 6	Vacancy	5364	Paraprofessional Special Ed
S543	Hr Special Circumstance	New Position 7	Vacancy	9999	Principal
S710	Transportation	New Position 4	Vacancy	7016	Driver-Assistant Trainer

6. When you have finished all of the changes you would like to make, go back to the **Smart View** tab and click the Submit icon. This will submit the changes to Hyperion.



7. What other information on this form can be changed? _____