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HYP2: Smart View

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Objectives

By the end of the session, you will be able to perform several Smart View tasks.






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Smart View Tasks

- Connect to Smart View (one-time setup)
- Make mass changes using Smart View:
 - Change Café Plan Cash amount for anyone with a specific ERN
 - Add an end date to discontinue an additional earning
 - Change Unemployment Insurance rate
 - Add default Object codes
 - Change the position name on the M_New Position form

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What is Smart View?



- Smart View is an Excel Add-on that interfaces with Hyperion.
- It is a tab that appears in the ribbon after installation.
- It allows you to work on any of the delivered or custom forms in Excel, outside of Hyperion, and then submit the updated data back into Hyperion.
- It allows you to use Excel functionality for efficiency (filters, searches, fill down, etc.).
- NOTE: Do not use Smart View to update FTEs.

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Installing Smart View


- Depending on your district's security protocol, your IT Technician may need to perform the install. Once installed, the Smart View tab will be available on your Excel Toolbar Ribbon.
- Make sure the latest version of Smart View is installed on your computer (Version 11.1.2.5.810). This version can be downloaded from the Oracle website <http://www.oracle.com/technetwork/middleware/smart-view-for-office/overview/index.html>
- Follow the download instructions. You will need to create an Oracle account.
- Once loaded, you should see the Smart View add-in tab on the Excel Toolbar Ribbon.
- You can click the Smart View tab and then the Help dropdown – About to see the version.

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Connecting to Smart View



- Set up Smart View Options (**one-time setup**)
- Connect through Production
- Select the Server
- Navigate to Application
- Select a Form

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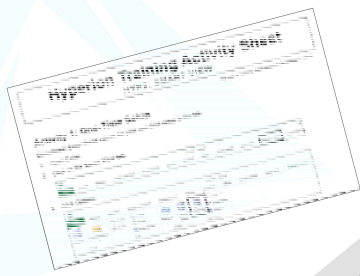
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COURSE EVALUATION

Activities

- **Let's get started**
- Please go to your activity sheet and open Excel.



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On Your Own Time

- **Directions:** Pick 1-2 activities and try them on your own.
- **Suggestion:** Find doctorate stipend and use Smart View to update (similar to Activity 2).

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Q & A

Before we go to the course evaluation, what kinds of questions can we answer?

COURSE EVALUATION

Please go to the Links page on the CRC website. Scroll all the way to the bottom and click on Peri the Muppet.



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