

Oracle Hyperion Smart View

Course Description

Course Name:	Oracle Hyperion Smart View
Course Number:	O-SMART-ALL
Duration:	1 Day
Release:	11.1.2.4.x

The Hyperion Smart View course is designed to take users through the steps required to access and analyze data using Smart View. Working with Smart View in an interactive case study, Planning and Essbase users learn how to enter data into grids, work with task lists, manage the Planning approval process, take data forms offline, and use ad hoc tools to analyze Planning data.

HFM users learn how to query, consolidate, and analyze data from Financial Management applications followed by creating ad hoc queries, free-form grids, and advanced reports. Essbase only users learn to query, analyze, and share data stored in Essbase databases. Users connect to data sources and create ad hoc queries and free-form grids.

Then, by embedding dynamic data points into Microsoft Word, all users will bring their data into documents and learn how to import Workspace content into Microsoft Excel, Word, and PowerPoint.

Who Should Attend

- System Administrators
- Application Developers
- Project Managers
- IT Support

Course Information

Advance Preparation: None

Program Level: Intermediate

Delivery Method: Group – Live

CPE Credit: 8.5 credits in Specialized Knowledge and Applications

Prerequisites

- Basic Microsoft Windows skills
- Knowledge of spreadsheets
- Working knowledge of either Planning or HFM concepts and terms.

Course Registration: 203-941-0714 or

online at <http://www.compintelligence.com>

Policies: For information regarding cancellations, refunds, or other questions, contact us

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Course Outline

1 Introduction to Smart View

Smart View Installation Components

Smart View Overview

Typical Business Process for Smart View

Smart View Interface

Ribbon

Smart View

HFM Ad Hoc

Planning Ad Hoc

Essbase Ad Hoc

Smart View Panel

Document Contents Pane

Connections

Shared Connections and Private Connections

Connect to Data Sources

Create Private Connections

Delete the List of Private Connections

Save Shared Connections as Private Connections

2 Analyzing Data with Ad Hoc Analysis Tools

About Ad Hoc Analysis

Start Ad Hoc Analysis

Excel Formulas in Ad Hoc Grids

Format Ad Hoc Grids

Use Smart View Formatting

Use Excel Formatting

Zoom In

Zoom In to the Default Level

Zoom In to a Selected Level

Zoom Out

Set a Default Zoom Level

Enable Double-Click Zooming

Pivot

Remove Selected Members from the Grid

Insert Rows and Columns

Set Dimensions and Members

Select Members from the Member Selector

Select Members from the POV Toolbar

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- Place Members and Dimensions from the POV Toolbar onto the Grid
- Hide the POV Toolbar
- Copy and Paste a POV
- Delete a POV

3 Cell Comments

- View and Add Cell Comments
- Edit and Delete Cell Comments

4 Smart View Options

- Global Options and Sheet Level Options
- Member Options
- Data Options
- Advanced Options
- Formatting Options
- Cell Styles

5 Smart Slices

- About Smart Slices
- Smart Slices and Ad Hoc Analysis
- Create Smart Slices
- Set Smart Slice Data Boundaries
- Set Smart Slice Preferences

6 Functions

- Create Functions with Function Builder
- Create Functions Manually
 - Syntax Guidelines
- Function Descriptions
- Common Function Error Codes

7 Smart Query

- Define Sets
- Define Set Filters
- Build the Smart Query
- Complete the Smart Query
- Open a Smart Query

8 Importing Reporting Documents into Microsoft Office

- Import Financial Reporting Documents
- Edit and Refresh Documents



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9 Copying Data between Excel, Word, and PowerPoint

10 Open Data Grids and Data Forms in Smart View

11 Planning Admin Extension

Make Property Changes to a Member

Move a Member

Add a Member

Shared Members

Refresh/Create Database