Oracle® Fusion Cloud EPM

Smart View for Office Quick Start Checklists

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Contents

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Part I

Service Administrator

Related Topics

- [Administering Smart View Checklist for Service Administrators](#)

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Administering Smart View Checklist for Service Administrators

Welcome, Oracle Smart View for Office Service Administrators!

Here's a checklist to help you get going with the Smart View on Day 1 of your experience, with links to documentation and other resources.

> ⓘ **Note**
>
> This checklist is meant to be a general guideline for tasks to be performed on Day 1 after the Smart View. There may be more tasks required for this role on Day 1, depending on your organization's requirements. Some steps may not apply depending on the business processes you are using with Smart View.

Log in and setup

1. Prepare client machines by ensuring that they are on supported versions of the Operating System (OS) and Smart View and meet other prerequisites.

    Read this:

    [Installation Guidelines](#) (5 minutes)

2. Download the Smart View installer and push to client machines in accordance with your organization's policies and procedure.

Read this: Installing from My Oracle Support or Oracle Technology Network (5 minutes)

Read this: Running Command Line or Silent Installations (5 minutes)

3. If your users plan to use Web Launch or Drill Through, install browser add-ons.

   Read this: Installing Browser Add-ons (5 minutes)

4. Configure connections for users (shared or private connection).

   Read this: Connections

   Watch this: Overview: Leveraging Cloud EPM and On-Premise Data Using Smart View Connections (5 minutes)

   Read this: About Accessing Shared Connections from an XML File (5 minutes)

5. Deploy extensions.

   Read this: About Extension Installations and Updates (5 minutes)

6. Navigate around the ribbon and panel.

   Read this: Smart View Components (5 minutes)

   Watch this: Navigating Smart View (5 minutes)

7. Open a form or ad hoc form and check connections.

   Read this: Opening Forms in Excel (5 minutes)

   Read this: Starting Ad hoc Analysis (5 minutes)

   Watch this: Creating Basic Ad Hoc Reports in Smart View (5 minutes)

8. Notify users that Smart View is ready to use.

   Follow your company's process for communicating with users.

Part II

Power User

Related Topics

- [Log In and Start Checklist for Smart View Power Users](#)

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Log In and Start Checklist for Smart View Power Users

Welcome, Oracle Smart View for Office Power Users!

Here's a checklist to help you get going with Smart View on Day 1 of your experience, with links to documentation and other resources.

> ⓘ **Note**
>
> This checklist is meant to be a general guideline for tasks to be performed on Day 1 of getting going with Smart View. There may be more tasks required for this role on Day 1, depending on your organization's requirements. Some steps may not apply depending on the business processes you are using with Smart View.

Install clients and configure

1. Meet prerequisites for your machine: ensure your Administrator has installed Smart View and all necessary extensions on a supported OS version and Office version.

   Read this: [Downloading and Installing Smart View](#) (10 minutes)

   Read this: [Extensions](#) (5 minutes)

2. a. If a connection has been configured by your Administrator, connect to your Oracle Fusion Cloud Enterprise Performance Management business process.

Read this: [Connecting to Data Sources](#) (5 minutes)

Watch this: [Leveraging Cloud EPM and On-Premise Data Using Smart View Connections](#) (5 minutes)

    b. If a connection has not been configured by your Administrator, create a shared or private connection.

Read this: [Creating Shared Connections](#) (5 minutes)

Read this: [Creating Private Connections](#) (5 minutes)

Watch this: [Leveraging Cloud EPM and On-Premise Data Using Smart View Connections](#) (5 minutes)

3. Navigate around the ribbon and panel.

Read this: [Smart View Components](#) (5 minutes)

4. Set global and sheet-level options such as display and formatting preferences.

Read this: [Setting Smart View Options](#) (5 minutes)

Watch this: [Navigating Smart View](#) (5 minutes)

5. Open an existing form already created by an Administrator and begin entering and submitting data.

Read this: [Opening Forms in Excel](#) (5 minutes)

Read this: [Using the Submit Data Options](#) (5 minutes)

6. Change the POV.

Read this: [Selecting Members from the POV Toolbar](#) (5 minutes)

7.   **a.** Perform analysis on a currently opened form by transforming it to an ad hoc grid.

Read this: [Performing Ad Hoc Analysis in Cloud EPM Forms](#) (5 minutes)

    b. Perform ad hoc analysis based on a cube or a form enabled for ad hoc.

Read this: [Starting Ad Hoc Analysis](#) (5 minutes)

Watch this: [Creating Basic Ad Hoc Reports in Smart View](#) (5 minutes)