

# Oracle® Fusion Cloud EPM

## Getting Started with Oracle Smart View for Google Workspace



F95961-05

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Oracle Fusion Cloud EPM Getting Started with Oracle Smart View for Google Workspace,

F95961-05

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Primary Author: EPM Information Development Team

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# 1

## Creating and Running an EPM Center of Excellence

A best practice for EPM is to create a CoE (Center of Excellence).

An **EPM CoE** is a unified effort to ensure adoption and best practices. It drives transformation in business processes related to performance management and the use of technology-enabled solutions.

Cloud adoption can empower your organization to improve business agility and promote innovative solutions. An EPM CoE oversees your cloud initiative, and it can help protect and maintain your investment and promote effective use.

The EPM CoE team:

- Ensures cloud adoption, helping your organization get the most out of your Oracle Fusion Cloud EPM investment
- Serves as a steering committee for best practices
- Leads EPM-related change management initiatives and drives transformation

All customers can benefit from an EPM CoE, including customers who have already implemented EPM.

### How Do I Get Started?

Click to get best practices, guidance, and strategies for your own EPM CoE: [Introduction to EPM Center of Excellence](#).

### Learn More

- Watch the Cloud Customer Connect webinar: [Creating and Running a Center of Excellence \(CoE\) for Cloud EPM](#)
- Watch the videos: [Overview: EPM Center of Excellence](#) and [Creating a Center of Excellence](#).
- See the business benefits and value proposition of an EPM CoE in *Creating and Running an EPM Center of Excellence*.



# 2

## Overview

Oracle Smart View for Google Workspace provides a common Google Workspace interface designed specifically for Oracle Fusion Cloud Enterprise Performance Management business processes.

Oracle Smart View for Google Workspace enables users of Google Workspace to access Cloud EPM data, work on forms, and perform ad hoc analysis in Google Sheets. Using Smart View, you can view, import, manipulate, distribute and share data in Google Sheets.

To use Smart View in Google Sheets, users need to install the Smart View add-on extension from Google Workspace Marketplace. The Smart View add-on extension enables Google Workspace users to take advantage of Smart View functionality in Google Sheets.

This guide covers the prerequisites and the installation information required to install Smart View in Google Sheets. To learn how to connect to data sources and use Smart View features for viewing and analyzing data in Google Sheets, see [Working with Oracle Smart View for Google Workspace](#).

Note the following considerations while using Oracle Smart View for Google Workspace:

- Because Oracle Smart View for Google Workspace requires that additional processing takes place on Google's servers, you may observe slower than expected performance times for some operations.
- The user interface components of Oracle Smart View for Google Workspace, such as menu labels, messages, dialog boxes, panels and so on, are currently available only in the English language, irrespective of the language selected in the Language Settings of your Google Workspace account.
- Native mode for ad hoc operations is being phased out in favor of Standard mode, which offers enhanced features and is recommended for all users. To utilize Smart View effectively, Oracle advises you to configure your Cloud EPM applications to use the Standard mode option for the Smart View Ad Hoc Behavior setting. This ensures compatibility and access to the latest functionalities.

### Video

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#### Your Goal

Learn how to set up Smart View for Google Workspace and enable Cloud EPM users to access Cloud EPM data, work on forms, and perform ad hoc analysis in Google Sheets.

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#### Watch This Video



[Setting Up Smart View for Google Workspace](#)

## Supported Data Source Providers

Oracle Smart View for Google Workspace currently supports Oracle Fusion Cloud Enterprise Performance Management data source providers.

The following business processes of Cloud EPM are supported:

- Enterprise Profitability and Cost Management



- Financial Consolidation and Close
- FreeForm
- Planning
- Tax Reporting

## Use of Information Received from Google APIs

The use of information received from Google APIs will adhere to the [Chrome Web Store User Data Policy](#), including the [Limited Use](#) requirements.

For Oracle's Privacy Policies, see: <https://www.oracle.com/legal/privacy/>

## Oracle Smart View for Google Workspace Terms of Service

The following Terms of Service is in addition to the agreement described in [Oracle Technology Network Developer License Terms](#):

By launching or using Oracle Smart View for Google Workspace or by selecting the "I accept" button or box (or the equivalent), You agree to be bound by the [Oracle Technology Network Developer License](#), and that your use of Oracle Smart View for Google is subject to the [Google Workspace Marketplace Terms of Service](#), (collectively, the "Terms of Use"). If You are agreeing to the Terms of Use on behalf of a company or other legal entity, You represent that You have the authority to bind it to the Terms of Use and, in such event, "You" and "Your" as used in the Terms of Use shall refer to such entity. *If You are not willing to be bound by the Terms of Use, do not select the "I accept" button or box (or the equivalent) and do not launch or access Oracle Smart View for Google Workspace.*

# 3

## Prerequisites

Consider the following prerequisites before using Oracle Smart View for Google Workspace.

- You are using Chrome or any browser that is compatible with Google Workspace.
- You have a Google Workspace account provisioned by your organization.
- Your Oracle Fusion Cloud Enterprise Performance Management environment is updated to at least release 25.01.
- Your Cloud EPM environment is deployed on Oracle Cloud Infrastructure (OCI).
- Support for Google Sheets is enabled in the web application settings for the respective business process. For more information, see [Enabling the Smart View Extension for Google Sheets](#).
- If the organization's sign in credentials are used to access a business process from Smart View, then Service Administrator must create an IDCS application and provide the connections details to users for connecting to the business process. For more information, see [Creating an Oracle Identity Cloud Service \(IDCS\) Application](#).

## Enabling the Smart View Extension for Google Sheets

Users can use Smart View features in Google Sheets only if the Service Administrator has enabled it at the application level.

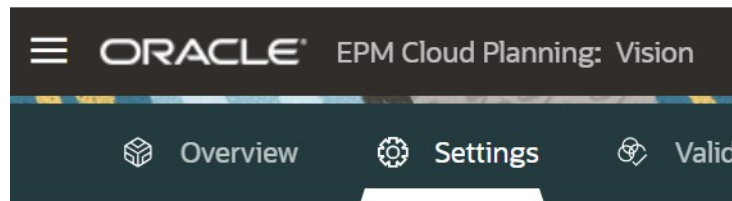
The Service Administrator must enable support for Google Sheets from the application settings of every business process that users want to connect to using Smart View in Google Sheets. It is not enabled by default.

When Google Sheets support is not enabled and users connect to their business process from Smart View, they can only reopen saved sheets, view sheet information, adjust data values, expand or collapse cells, and change Smart View Options. However, when users try to refresh or submit saved sheets, update and submit data in grids, refresh functions in a sheet, a message appears stating *"This operation is not supported by the provider. Contact your Administrator to enable support for Google Sheets"* and they cannot proceed further with submitting or refreshing data. Similarly, when they try to open the Smart View Home Panel, a message appears stating *"Administrator has not enabled Google Sheets support for this instance"*.

Once the Service Administrator enables support for Google Sheets, then users can open the Smart View Home panel to view the library, work on forms and ad hoc grids present in their application, refresh and submit data, and use Smart View features.

To enable the Smart View extension for Google Sheets:

1. Open the web application for your business process.
2. Click **Applications** and then click **Settings**.
3. In the **Smart View Add-on** section, select the **Google Sheets** check box. This check box is not selected by default.



4. Click **Save**.

## Creating an Oracle Identity Cloud Service (IDCS) Application

As a Service Administrator, you must create an Oracle Identity Cloud Service (IDCS) application and provide the connection credentials to your users so that they can use the organization's sign in credentials to connect to their business processes from Oracle Smart View for Google Workspace.

Follow this procedure only if your users want to use the organization's sign in credentials to access their business process environments from Smart View. This procedure is not required if your users are native users using basic authentication such as a user name and password.

When users want to connect using their organization's sign in credentials, they are required to enter **Server URL**, **Client ID** and **IDCS URL** in the **Connect** dialog.

The screenshot shows a "Connect" dialog box with a close button (X) in the top right corner. Inside the dialog, there is a checkbox labeled "Company Sign In" which is checked. Below this, there are three text input fields labeled "Server URL:", "Client ID", and "IDCS URL". Below these fields, there is a "Clear Session" button. At the bottom, there is a checkbox labeled "Logs" which is unchecked. At the very bottom, there are two buttons: "Connect" (in blue) and "Close" (in grey).

As a Service Administrator, ensure that you configure and share these connection credentials with your users:

- **Server URL:** This refers to the web application link of your Oracle Fusion Cloud Enterprise Performance Management business process. Modify the web application link to remove "/" epmcloud" and add "/HyperionPlanning" towards the end of the URL.
- **Client ID:** This is generated as part of the IDCS application creation process explained below. To find the Client ID, go to **Identity domains** and click **Integrated applications**.

Click your IDCS application link and, in the **General Information** section, see the value in the **Client ID** field.

- **IDCS URL:** This is the URL that you get on the Sign In page when you open your Cloud EPM web application. Modify the link to retain it till "identity.oraclecloud.com" and remove the characters after this part. For example, `https://idcs-<instanceID>.identity.oraclecloud.com`.

The process of creating an IDCS application is divided into the following steps. This is a one-time configuration required for each environment.

### Step 1: Add an Application

Create and add a custom application for each business process that your users want to access through Smart View. There are various types of custom applications. For the purpose of Smart View, you need to create a **Mobile** application.

1. In the Identity Domain panel in the IDCS Console, click **Integrated applications**, and then click **Add Application**.
2. In the Add Application dialog, select **Mobile Application** and click **Launch Workflow**.
3. In the **Add application details** step, enter a name for your application and click **Next**.
4. In the **Configure OAuth** step, under Authorization, clear any options selected by default and select the **Refresh tokens** and **Device code** options.
5. Click **Finish**.  
The application's page opens providing an overview of the application details and related actions

Note that the **Client ID** that appears **General Information** section for the application. Make sure this Client ID is made available to your users, along with the Server URL and IDCS URL, before they start using Smart View.

For more information, see the following topics in Oracle Cloud Infrastructure documentation:

- [Adding Applications](#)
- [Adding a Mobile Application](#)
- [Configuring OAuth](#)

### Step 2: Activating Application

Now, activate the application you created in Step 1, so that it is available for users. On the application page, under the application name, click **Activate**.

For more information, see [Activating an Application](#) in Oracle Cloud Infrastructure documentation.

# 4

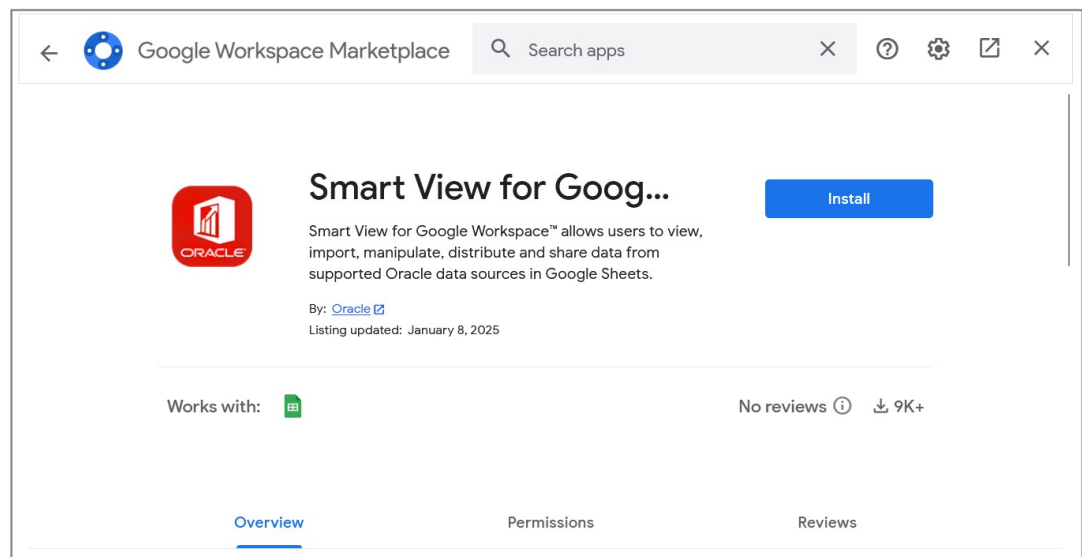
## Installing Smart View

The add-on extension for Oracle Smart View for Google Workspace is available for installation from the Google Workspace Marketplace.

You can install the Smart View extension in the Google account provisioned for you by your organization.

To install Smart View in Google Sheets:

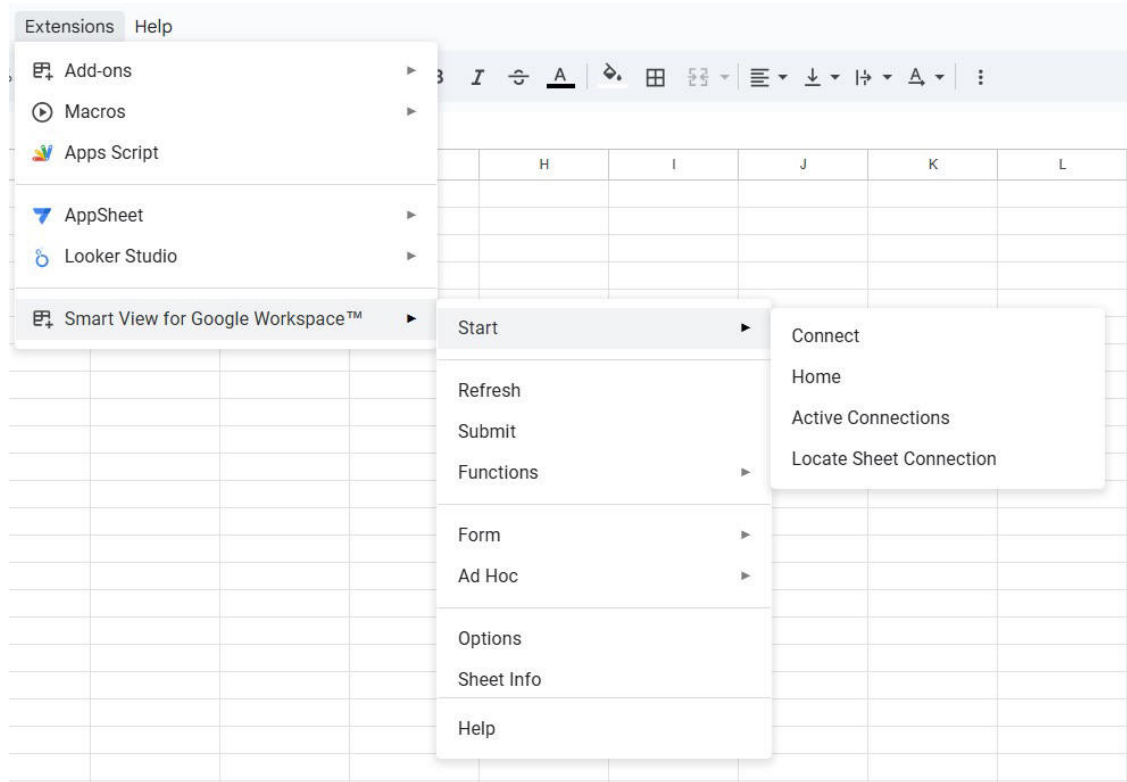
1. Sign in to Google Sheets using your Google Workspace credentials and open a new spreadsheet.
2. In the **Extensions** menu, select **Add-ons**, and then select **Get add-ons**.
3. In the **Google Workspace Marketplace** section, search for **Oracle Smart View for Google Workspace** and select the **Oracle Smart View** tile.
4. Review the details in the Overview and Permissions tabs, and click **Install**.



5. In the **Choose an account** dialog box, select the Google Workspace account in which you want to install the Smart View extension.
6. Review the privacy policy and terms of service, and click **Continue**.
7. Review the access permissions and click **Allow**.  
Smart View requires the following access permissions:
  - View and manage spreadsheets
  - See, edit, create, and delete all your Google Sheets spreadsheets
  - Connect to an external service
  - Display and run Smart View user interface (UI) and web content in prompts and sidebars inside Google applications

The installation begins. Once completed, you receive a confirmation message that **Smart View for Google Workspace** has been installed.

8. Click **Next** in the message and then click **Done** to close the dialog box.
9. In the spreadsheet, open the **Extensions** menu. You can now see the **Smart View for Google Workspace** menu containing various operations.



You can now connect to your business process and start performing various operations on your data in Smart View.

For more information on connecting to data sources and using Smart View features to view and analyze data, see [Working with Oracle Smart View for Google Workspace](#).

## Updating Smart View

You do not have to do anything to install an updated version of the Smart View extension.

You will receive automatic updates of the Smart View extension whenever Oracle posts an updated version to the Google Workspace Marketplace.

To view when the Smart View extension was last updated:

1. Sign in to Google Sheets using your Google Workspace credentials and open a new spreadsheet.
2. In the **Extensions** menu, select **Add-ons**, and then select **Manage add-ons**.
3. Click **Oracle Smart View for Google Workspace** and view the **Listing updated** field. It displays the date when the Smart View extension was last updated on the Google Workspace Marketplace.



## Uninstalling Smart View

To uninstall the Smart View extension from Google Sheets:

1. Sign in to Google Sheets using your Google Workspace credentials and open a new spreadsheet.
2. In the **Extensions** menu, select **Add-ons**, and then select **Manage add-ons**.
3. Click **Oracle Smart View for Google Workspace** and then click **Uninstall**.