General Fund - Hyperion Planning and Smart View   
Exercise Guide

Last Update: 2017/4/7

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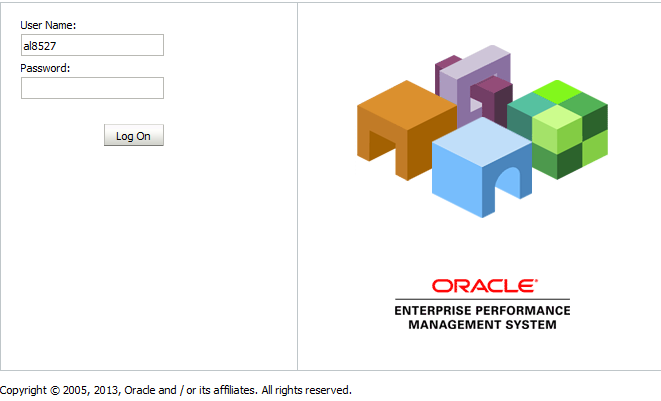
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# Exercise 1: Navigating to Task List

GOAL: In this exercise users will log into the Hyperion Planning application and navigate to the Budget – End User Task List.

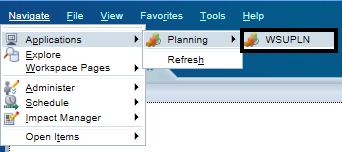
To Log into Hyperion Planning:

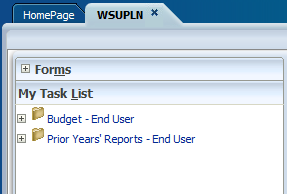
1. Open **Mozilla Firefox**.
2. Navigate to <https://hypwebpp.ad.wayne.edu/workspace/index.jsp>.
3. In the **User Name** field, enter your **Pipeline** **ID**.
4. In the **Password** field, enter your password.
5. Click **Log On**.



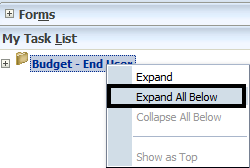
To Navigate to Budget – End User Task List:

1. Click **Navigate > Application > Planning > WSUPLN**.





1. Right click **Budget – End User**.
2. Click **Expand All Below**.

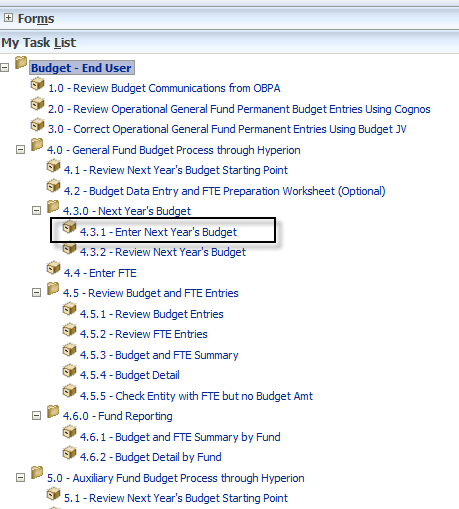


# Exercise 2: Adjusting Data in a Data Form

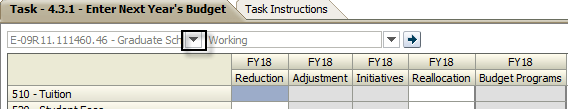
GOAL: In this exercise users will open a form in the Budget – OPBA Task List, type data in the form cells, copy and paste data into cells, adjust values by a percentage, add a comment to a cell, and attach a document to a cell.

To Open a Form from the Task List and Change Page Members:

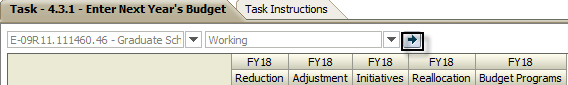
1. Click **4.3.1 – Enter Next Year’s Budget**.



1. Click the **Entity** page drop-down.

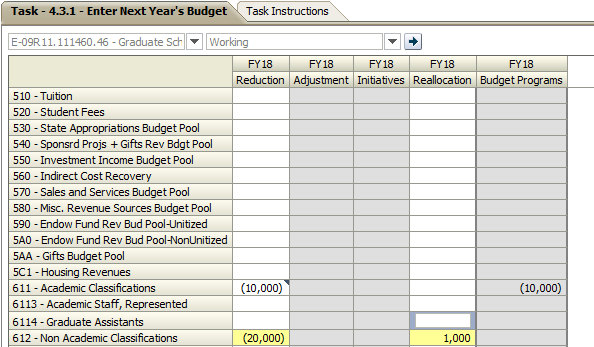


1. Select an appropriate entity.
2. Click **Go**.



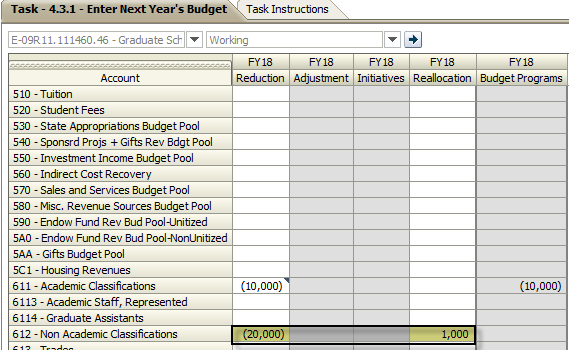
To Enter Data in a Form:

1. In 612 – Non Academic Classifications Budget Pool FY18 Reduction cell, enter **-20000**.
2. In 612 – Non Academic Classifications Budget Pool FY18 Reallocation cell, enter **1000**

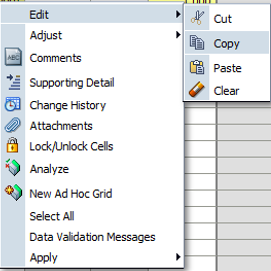


To Copy and Paste Data:

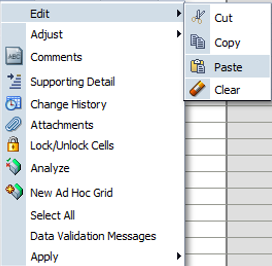
1. Click and drag to select all of the cells used in the previous section (**612 – Non Academic Classifications Budget Pool FY18: Reduction, Adjustment, Initiatives, and Reallocation**)**.**

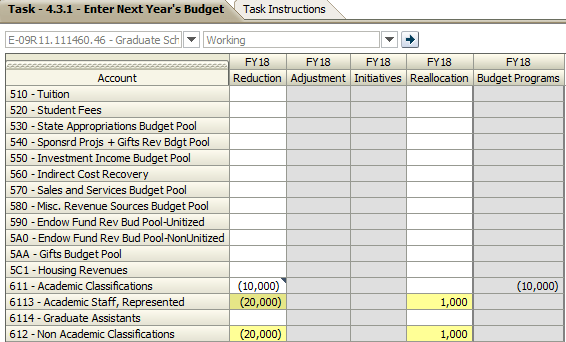


1. Right-click the highlighted cells and click **Edit > Copy**.



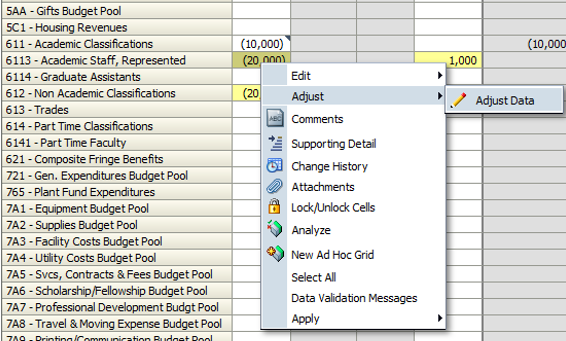
1. Right Click 6113 – Academic Staff, Represented, Reduction cell, **Edit🡪Paste**



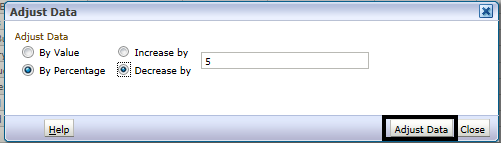


To Increase or Decrease Data Values:

1. Right-click **6113 – Academic Staff, Represented, FY18 Reduction**.
2. Click **Adjust** > **Adjust Data**.

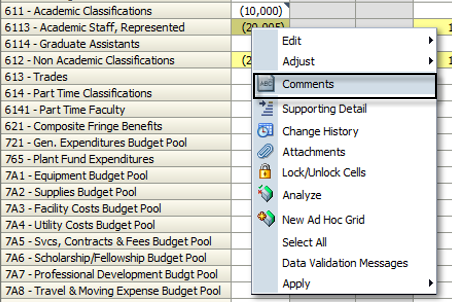


1. Click **By Percentage**.
2. Click **Decrease by**.
3. In the text field, enter **5.**
4. Click **Adjust Data**.

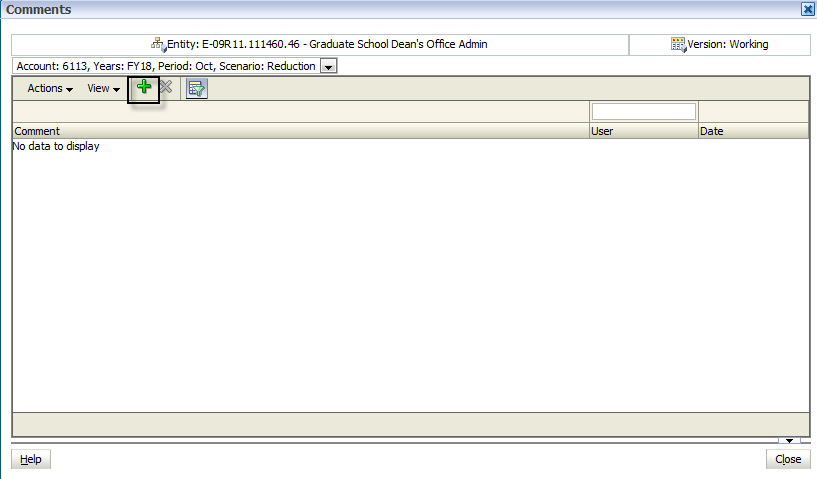


To Add a Comment to a Cell:

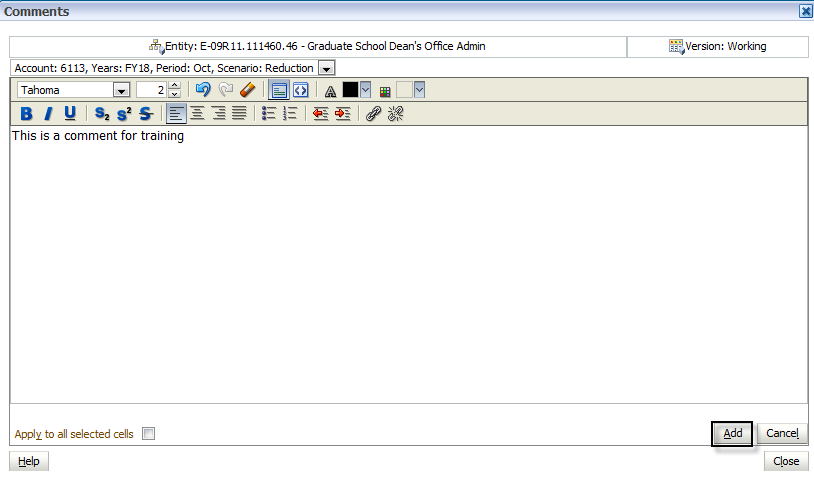
1. Right-click **6113 – Academic Staff, Represented, FY18 Reduction**.
2. Click **Comments**.



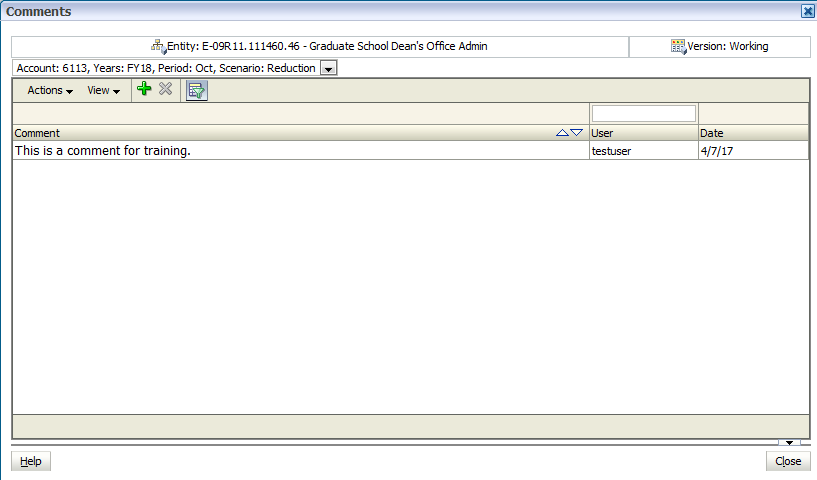
1. Click **“+”**.



1. Click in the text box and type **This is a comment for training**.
2. Click **Add**.

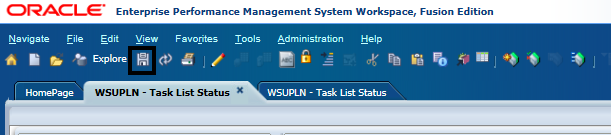


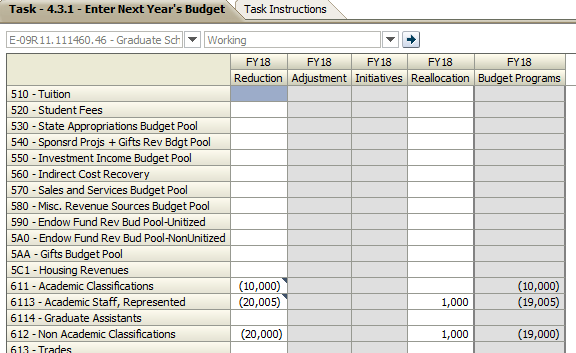
1. Click **Close**.



To Submit Data

1. Click **Submit Data**.





# Exercise 3: Financial Reports

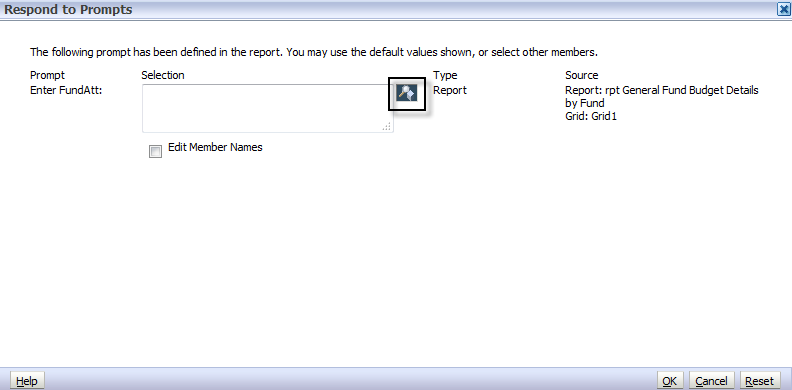
GOAL: In this exercise users will open a Financial Report from the task list, select a member for the report, and change the page of the financial report.

To Open a Financial Report from the Task List and select an entity:

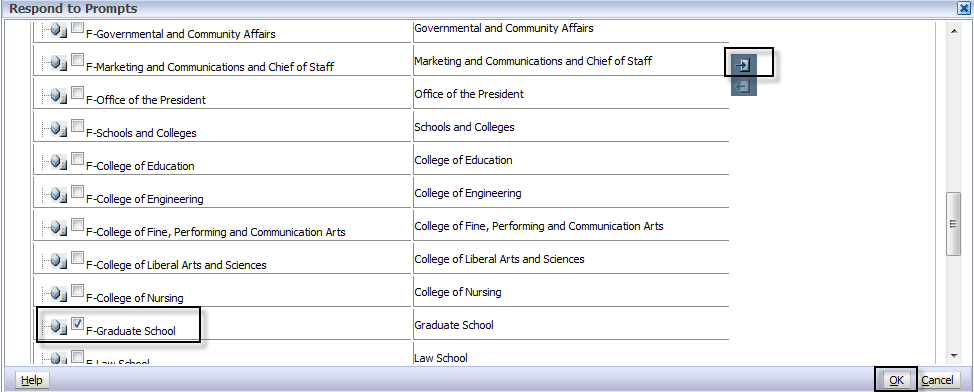
1. Expand **4.6.0 Fund Reporting**.
2. Click **4.6.2 Budget Detail by Fund**.



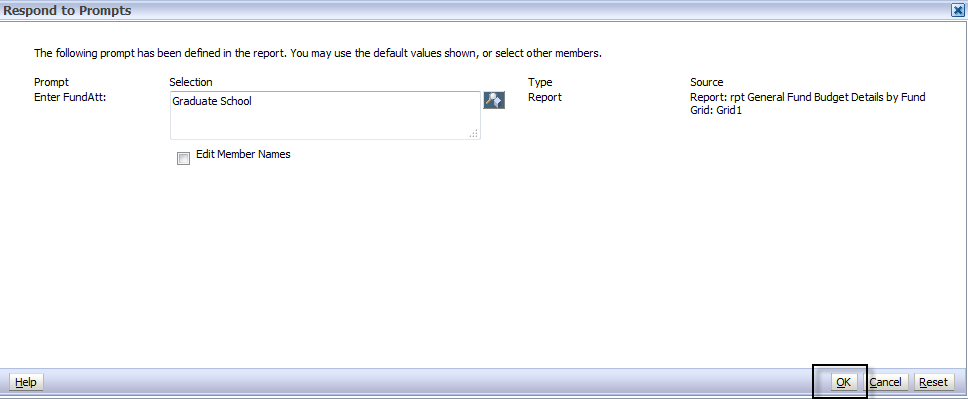
1. Click **Go to Member Selection**.



1. Click a **Fund**
2. Click **Add**, then Click **OK**

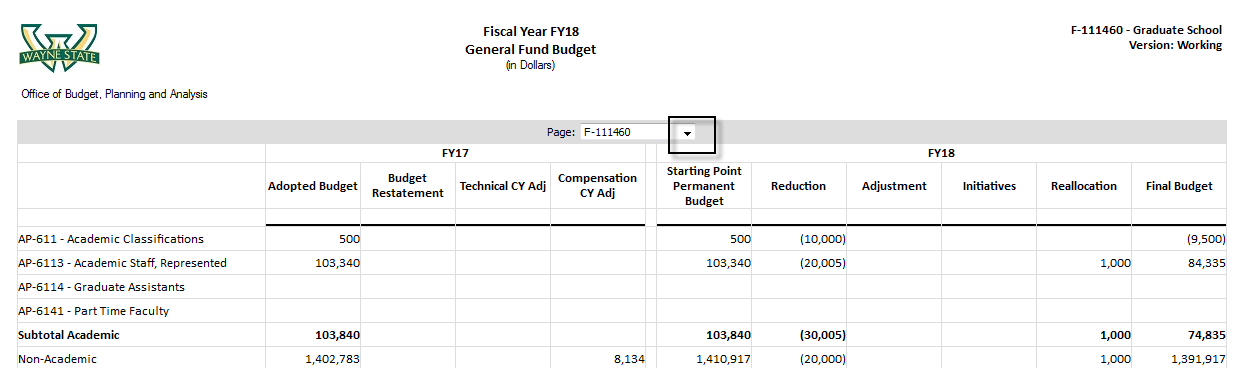


1. Click **OK** again



To Change the Page of a Financial Report:

1. Click the **Page** drop-down.



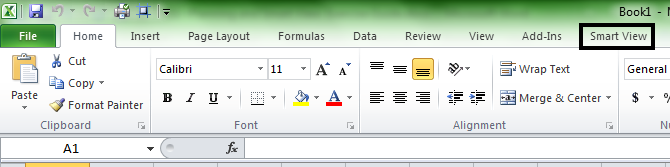
1. Select an appropriate member.

# Exercise 4: Setting up a Smart View Connection

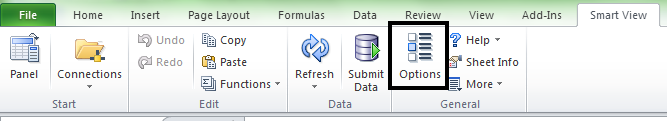
In this exercise users will adjust the Smart View options to have the correct Shared URL and connect to an Essbase cube.

To Set the Smart View Connection URL:

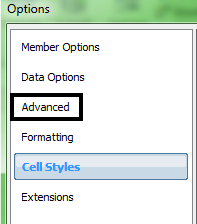
1. Open the **Microsoft Excel** application.
2. Click the **Smart View** ribbon.



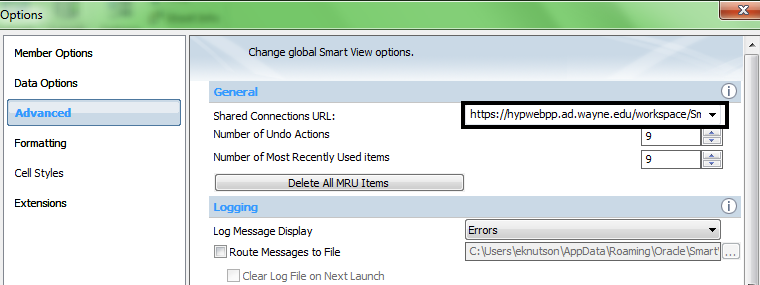
1. Click **Options**.



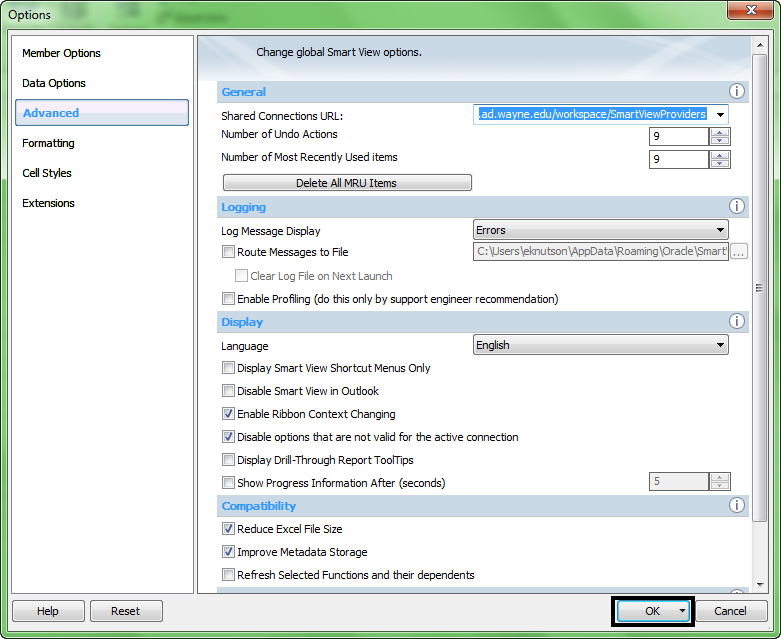
1. Click **Advanced**.



1. In the **Shared Connections URL:** type <https://hypwebpp.ad.wayne.edu/workspace/SmartViewProviders>.



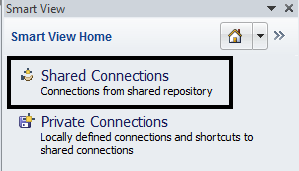
1. Click **OK**.



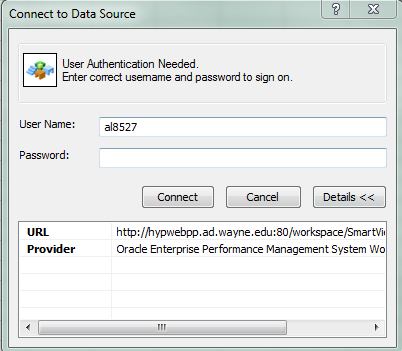
1. Click **Panel**.



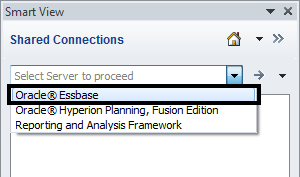
1. Click **Shared Connections**.



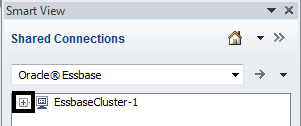
1. In the Username field, enter user **Access user ID**.
2. In the Password field, enter **user password**.
3. Click **Connect**.



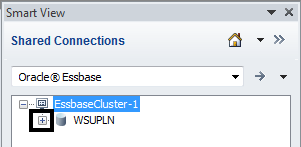
1. Click the **Server** drop-down.
2. Click **Oracle® Essbase**.



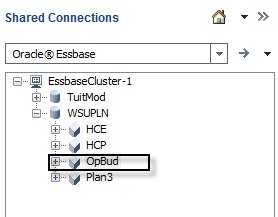
1. Expand **EssbaseCluster-1**.



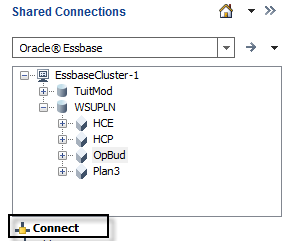
1. Expand **WSUPLN**.



1. Click **OpBud**



1. Click **Connect**

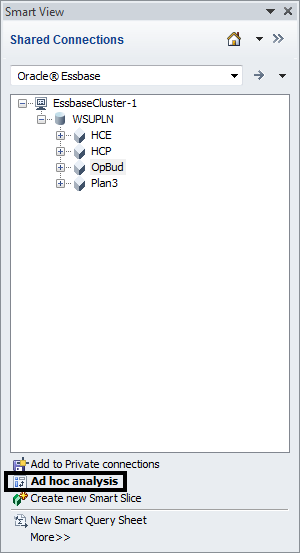


# Exercise 5: Smart View Ad Hoc Grid

In this exercise users will create an ad hoc grid, change the grid to show aliases, change the grid POV, and refresh the grid.

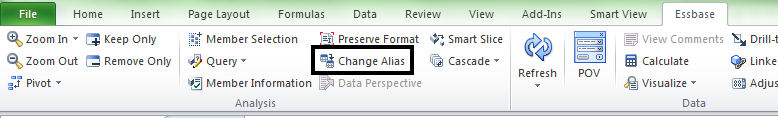
To Create an Ad Hoc Grid:

1. Click **Ad hoc analysis**.



To Change the Alias Table:

1. **Click Change Alias**.

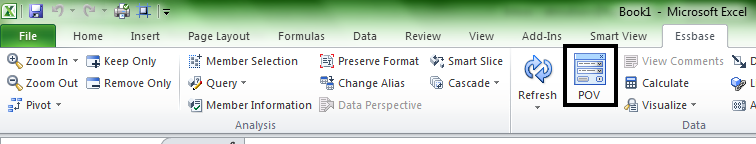


1. Click **Default**.

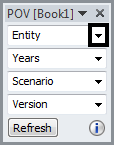


To Change the POV:

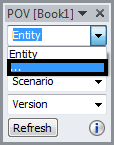
1. Click **POV**.



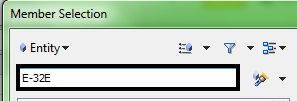
1. Click the **Entity** drop-down.



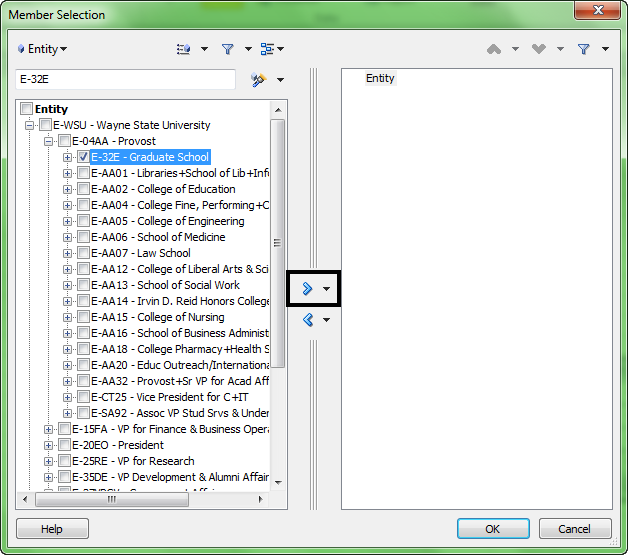
1. Click **…** (ellipses).



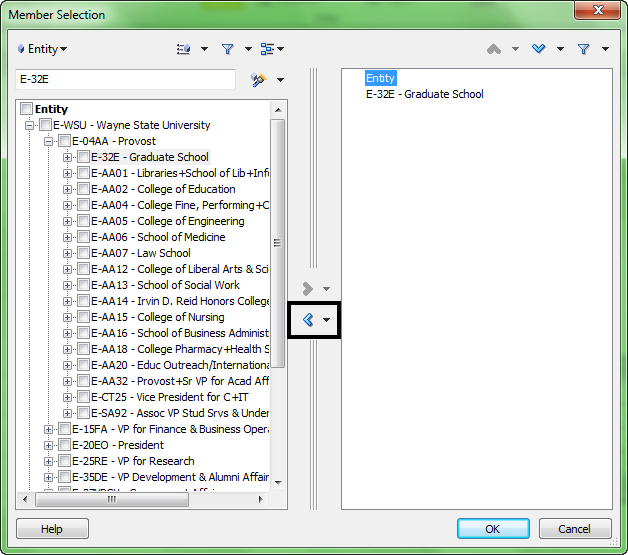
1. Click in the **Search box**, and type in an appropriate entity name**.**
2. Press **[ENTER]**.



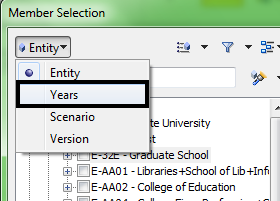
1. Select the entity from the left pane.
2. Click **Add**.



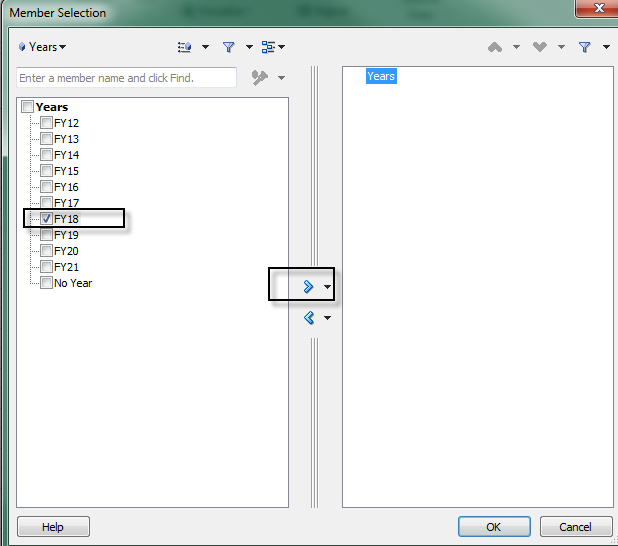
1. Click **Entity**.
2. Click **Remove**.



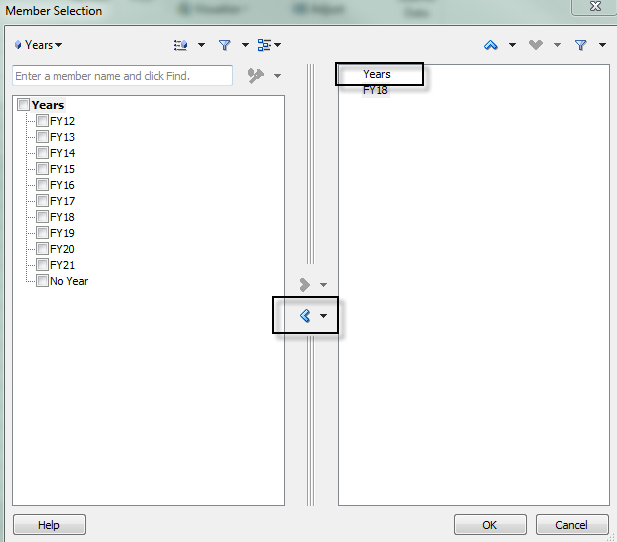
1. Click the **Entity** drop-down and select **Years**.



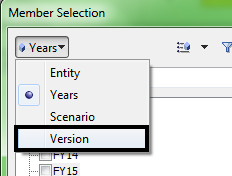
1. Select **FY18**.
2. Click **Add.**



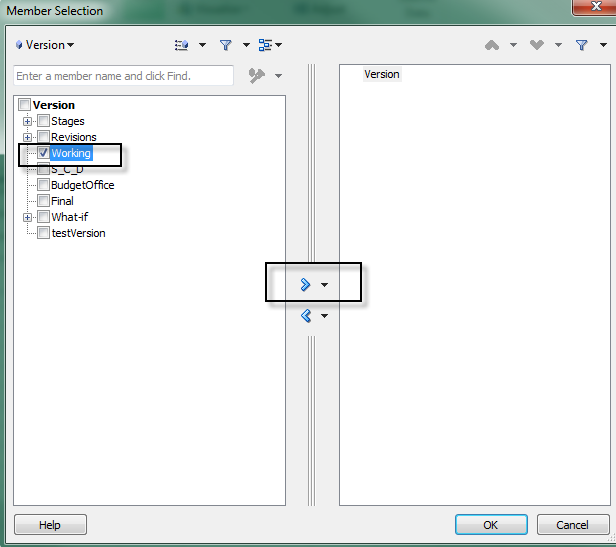
1. Click **Years.**
2. Click **Remove**.



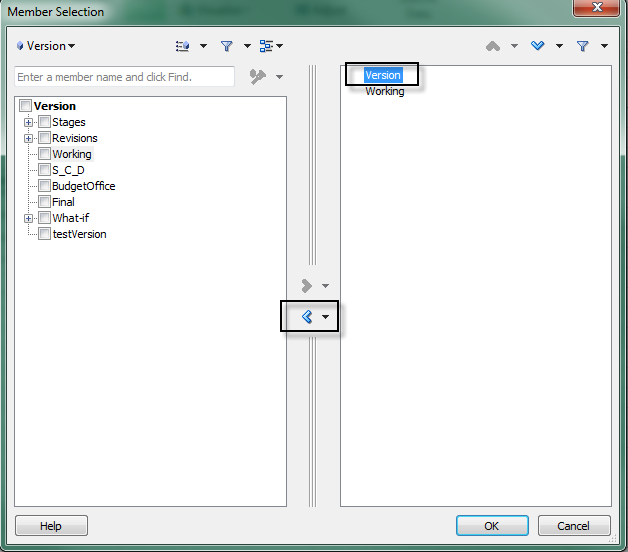
1. Click the **Years** drop-down and select **Version**.



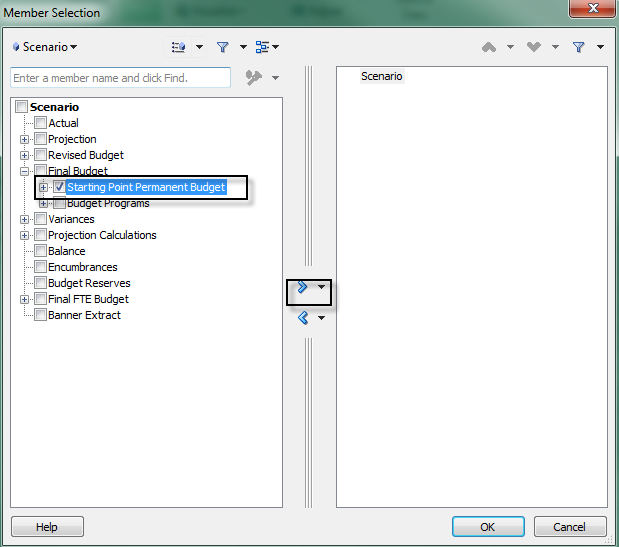
1. Select **Working**.
2. Click **Add**.



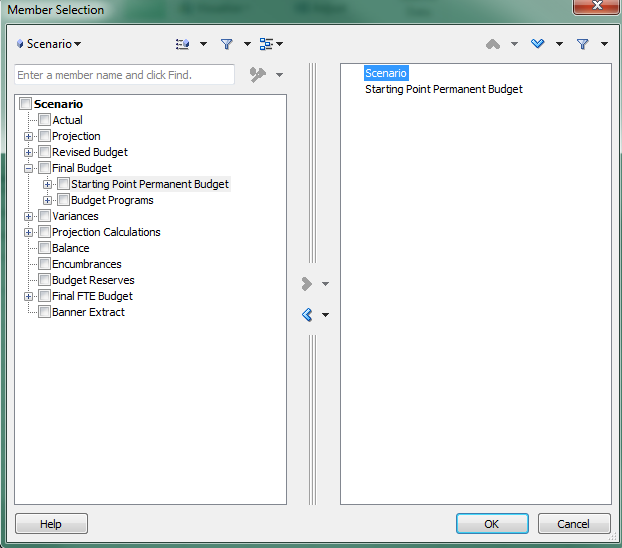
1. Click **Version**.
2. Click **Remove**.



1. Click the **Version** drop-down and select **Scenario**.
2. Expand **Final Budget**.
3. Select **Starting Point Permanent Budget**
4. Click **Add**.



1. Click **Scenario**.
2. Click **Remove**.

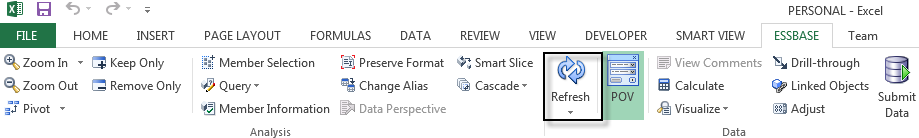


1. Click **OK**.

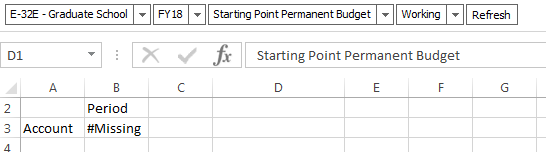


To Refresh the Grid:

1. Click **Refresh**.



1. Result:

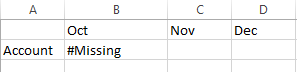


# Exercise 6: Smart View Ad Hoc Functionality

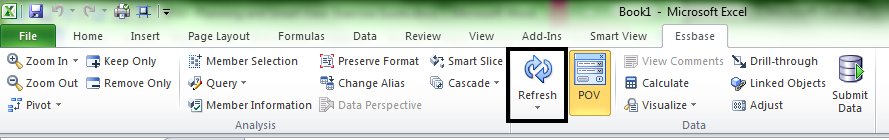
In this exercise users will do a free form grid, zoom in and out of a member, pivot members in the grid, pivot a member to the POV, and keep and remove members from the grid.

To Create Free Form Grid:

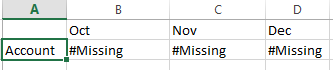
1. Click cell **B2,** and type **Oct**.
2. Click cell **C2**, and type **Nov**.
3. Click cell **D2**, and type **Dec**.



1. Click **Refresh**.

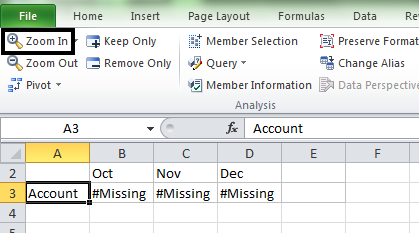


1. Result:

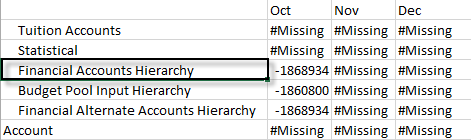


To Zoom In and Out of Members:

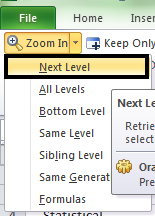
1. Click **Account** click **Zoom In**.



1. Click **Financial Account** Hierarchy.

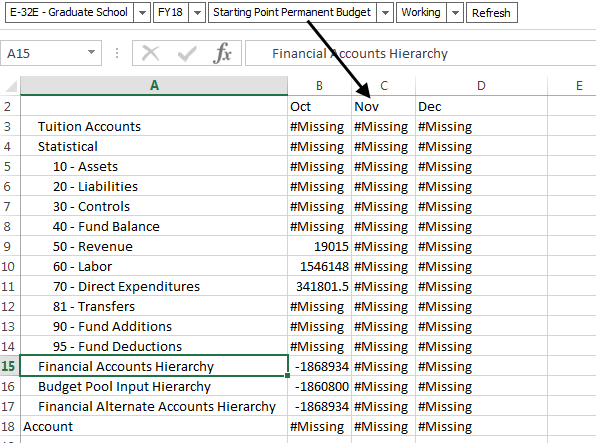


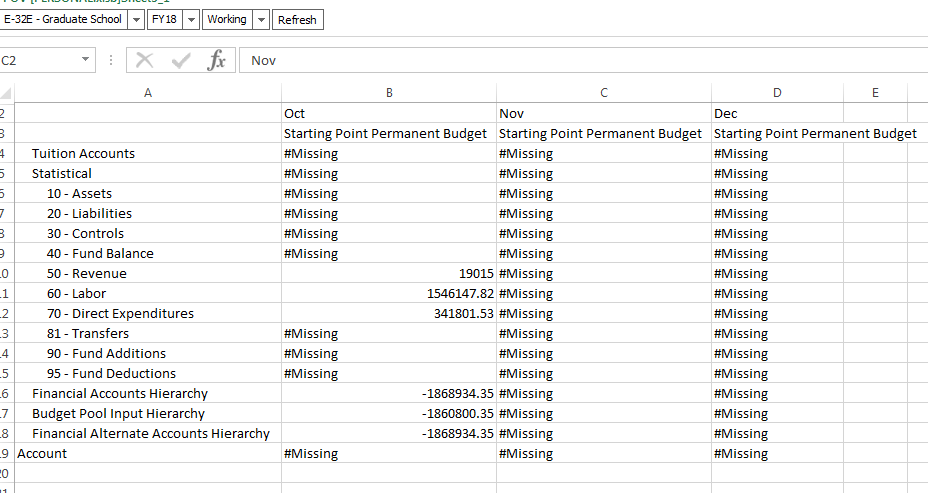
1. Click the **Zoom In** drop-down and select **Next Level.**

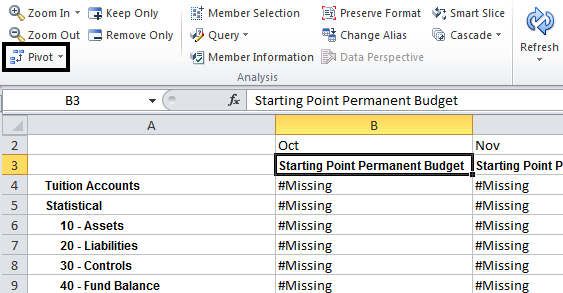


To Pivot Members:

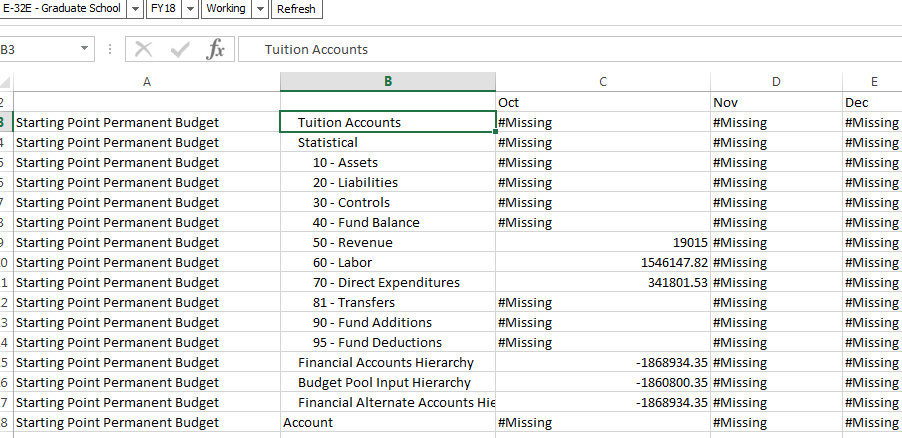
1. Click and drag **Scenario** from the POV to the Column of the grid.



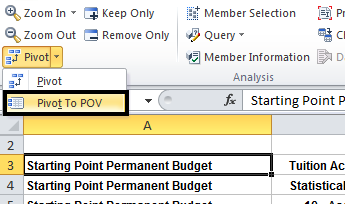
1. Result: 
2. Click cell **B3**.
3. Click **Pivot**.

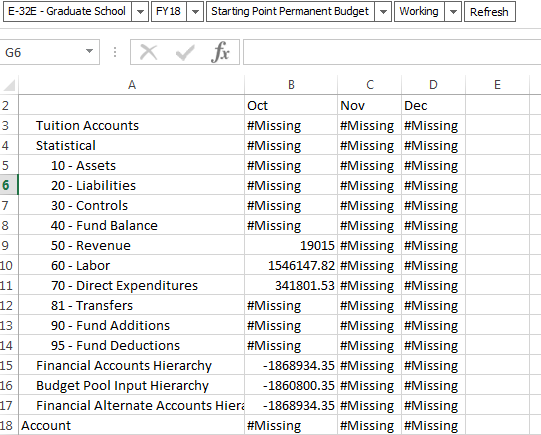


1. Result:



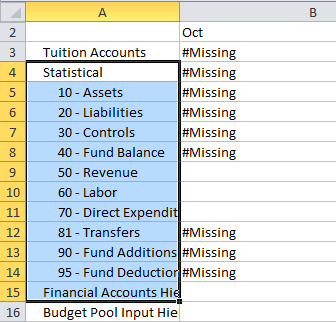
1. Click cell **A3**
2. Click the **Pivot** drop-down.
3. Click **Pivot to POV**.



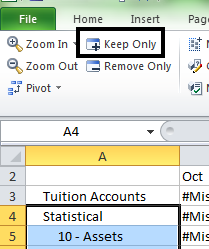
1. Result:
2. 

To Keep and Remove Members from the Grid:

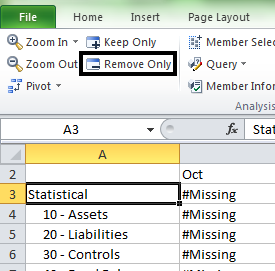
1. Click and drag to select cells **A4 - A15**.



1. Click **Keep Only**.



1. Click cell **A3** (i.e. Statistical).
2. Click **Remove Only**.

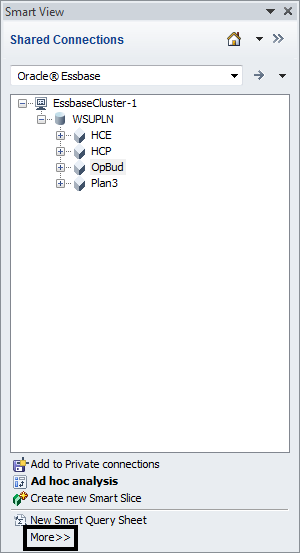


# Exercise 6: Smart View Ad Hoc Additional Functionality

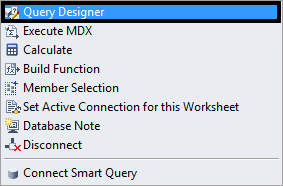
In this exercise users will create a query using Query Designer, format an ad hoc grid, and create a cascade report.

To Create a Query Using Query Designer:

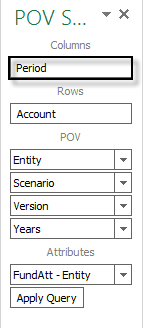
1. Click **More >>.**



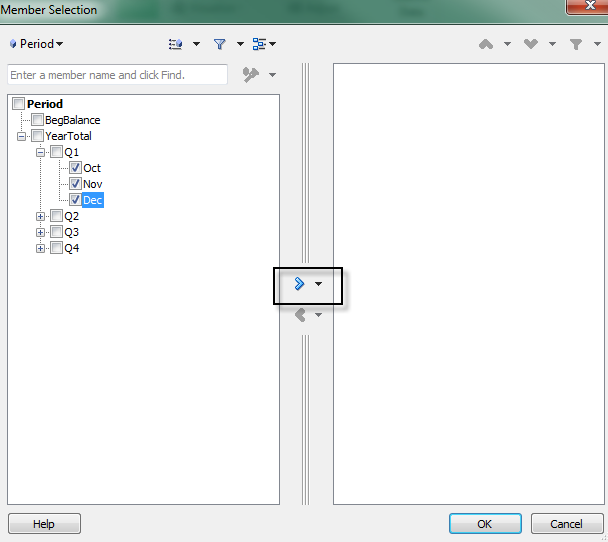
1. Click **Query Designer**.



1. Click **Period**.



1. Expand **YearTotal**.
2. Expand **Q1**
3. Click **Add.**



1. Click **OK**.



1. Select member for each Dimenson:

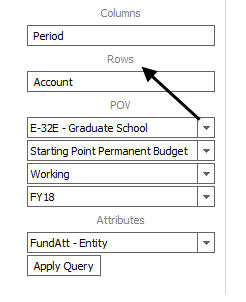
**Account:** Financial Accounts Hierarchy;

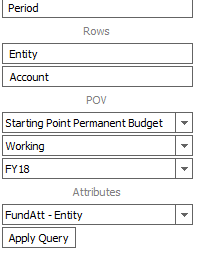
**Entity:** E-32E;

**Scenio:** Starting Point Permanent Budget;

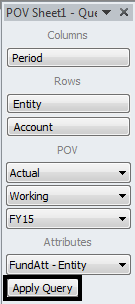
**Version:** Working;

**Years:** FY18

1. Click and drag **Entity** to **Rows**.
2. Result

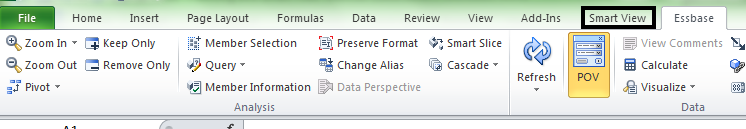


1. Click **Apply Query**.

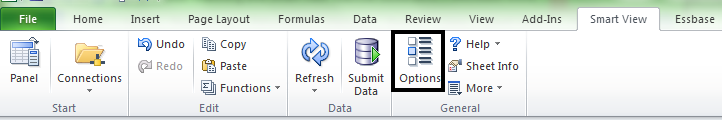


To Format an Ad Hoc Grid:

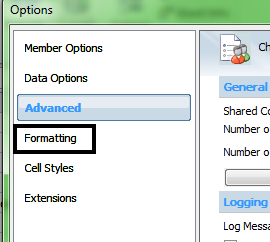
1. Click the **Smart View** ribbon.



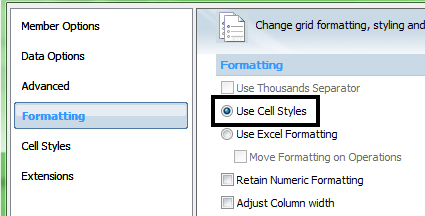
1. Click **Options**.



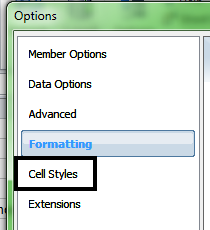
1. Click **Formatting**.



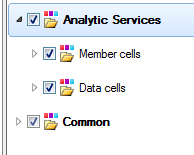
1. Ensure that **Use Cell Styles** is enabled.



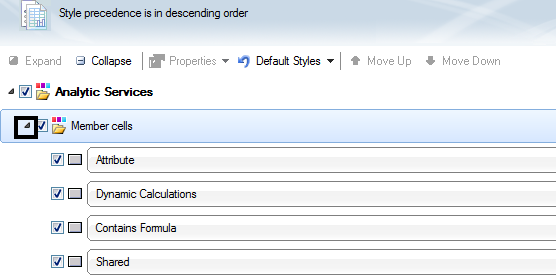
1. Click **Cell Styles**.



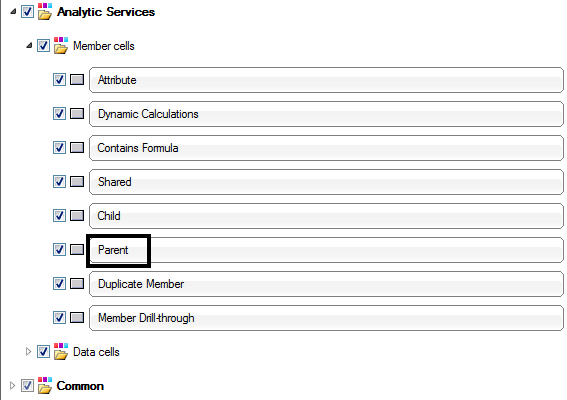
1. Expand **Analytic Services**.
2. Check **Analytic Services**.



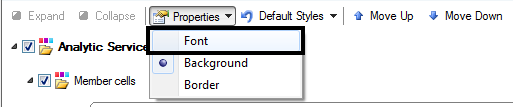
1. Expand **Member cells**.



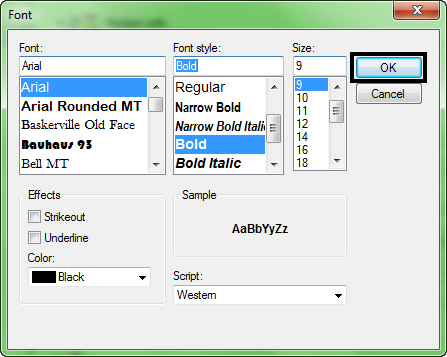
1. Click **Parent**.



1. Click **Properties** > **Font**.



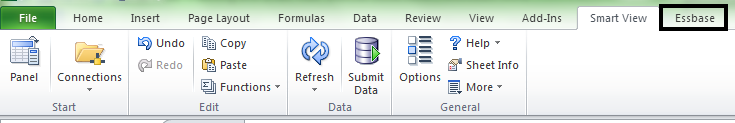
1. Select **Bold**.
2. Click **OK**.



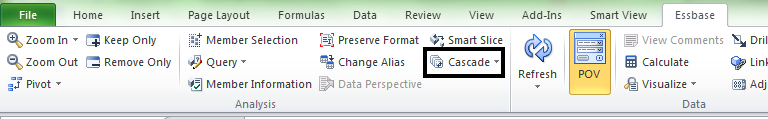
1. Click **OK**.

To Create a Cascade Report:

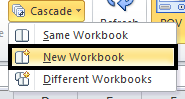
1. Click **Essbase**.



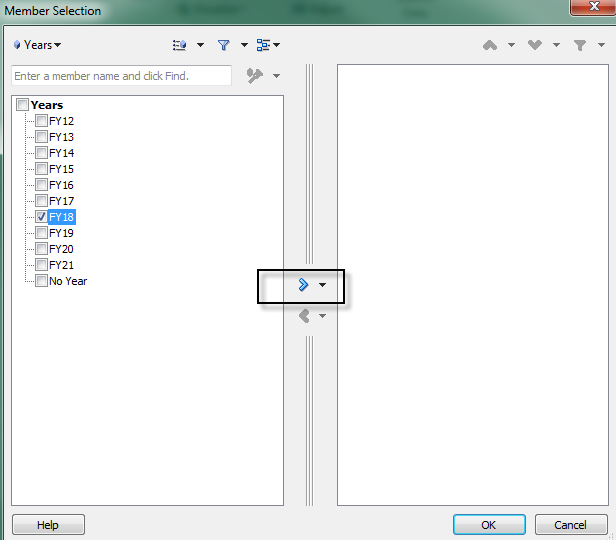
1. Click **Cascade**.



1. Click **New Workbook**.



1. Select **FY18**.
2. Click **Add**.

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1. Click **OK**.