


Smart View for Planning

Exercise 1: Connect to Smart View, Open a Form

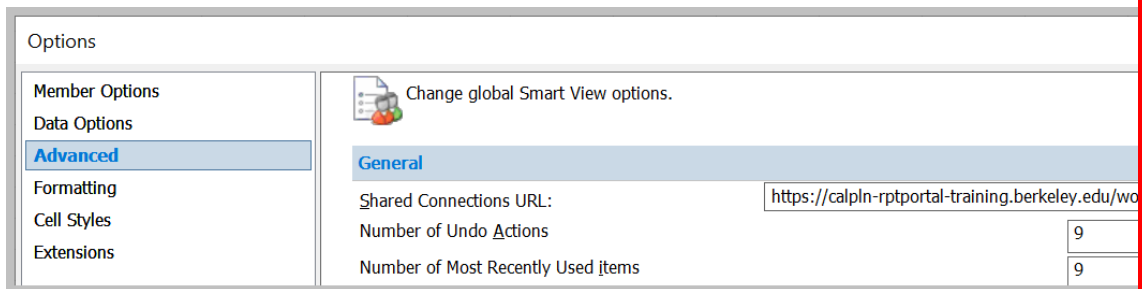
This exercise assumes that you have the campus Virtual Private Network (VPN) GlobalProtect and Smart View installed on your desktop. You'll know that Smart View is installed when you see Smart View on the Excel menu. If you don't have it installed, submit a ticket with [Service Now](#) to request the installation.

1. If you are away from campus, launch GlobalProtect  and select **Connect**. You must be connected with GlobalProtect in order to run Smart View from your desktop when you are away from campus.
2. If you have Smart View installed on your desktop, skip ahead to #7.
3. If you do not have Smart View installed on your desktop, go to your browser and navigate to <https://citrix.berkeley.edu>.
4. Enter your CalNet ID and passphrase.
5. Select the Smart View button. If the Smart View button isn't on the desktop, click the + button on the left side of the window and select Smart View from the list of Apps.
6. Double-click the file with the .ica extension at the bottom of your screen. This will launch Smart View.
7. Select **Smart View** from the Excel menu to display the Smart View ribbon.

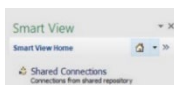
While you are learning, please take this extra step so that you can work in the Training environment and not impact production data. When you are ready to work in production, you can change the URL to the one shown for Production.

8. Select the Options button from the Smart View ribbon and select Advanced from the left panel. Edit the text for the Shared Connections URL as shown for Training. Click OK.

Training	https://calpln-rptportal-training.berkeley.edu/workspace/SmartViewProviders
Production	https://calpln-rptportal.berkeley.edu/workspace/SmartViewProviders

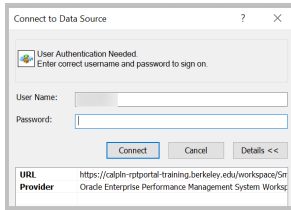


9. Click the **Panel** button
10. Click **Shared Connections**

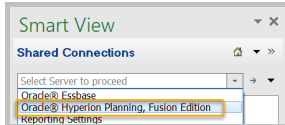


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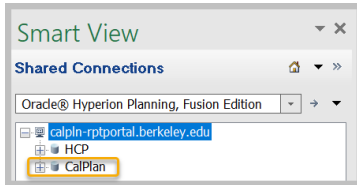
11. Enter your CalNet ID and Passphrase in the User Name and Password text boxes and click **Connect**



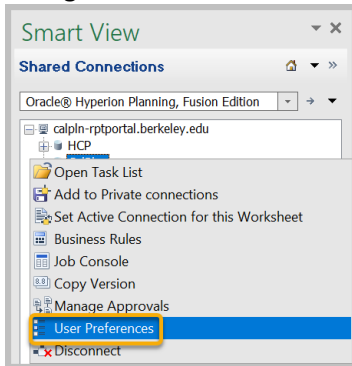
12. Select Oracle® Hyperion Planning, Fusion Edition from the Select Server drop-down list



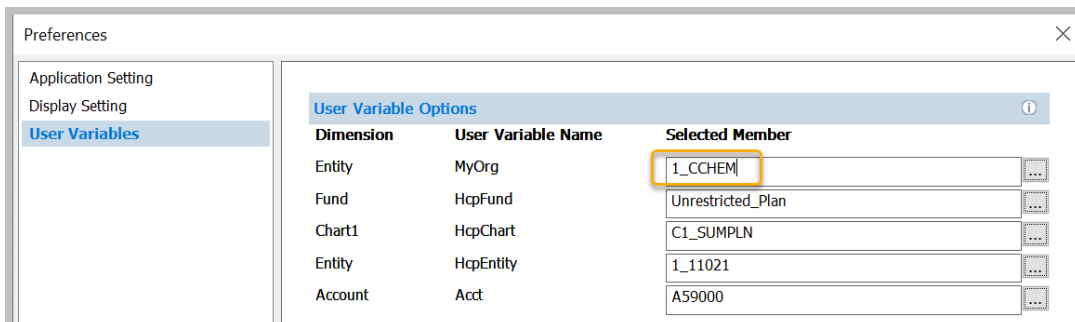
13. Click the + to expand calpln-rptportal.berkeley.edu
14. Double-click on CalPlan to connect to the application



15. Right-click on CalPlan and select User Preferences from the quick menu to open the Preferences dialog box

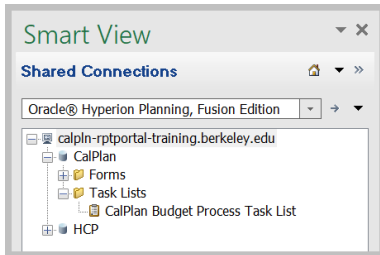


16. Select User Variables in the left panel and enter the entity you want to use as a default in the text box for Entity / MyOrg

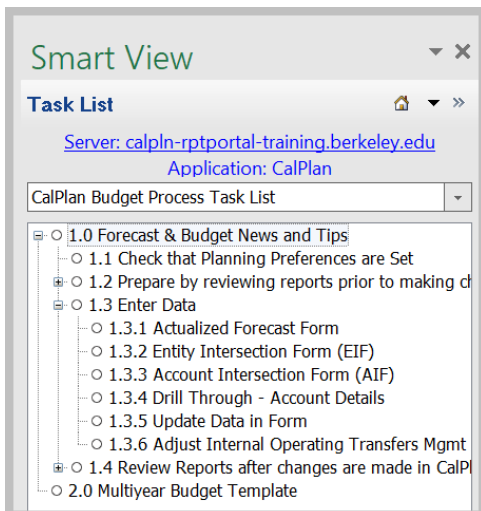


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17. Select OK to complete the dialog box
18. Expand the tree so that CalPlan Budget Process Task List is visible below Task Lists



19. Double-click on CalPlan Budget Process Task List
20. Expand the tree as shown below so you can see the forms in 1.3 Enter Data



21. Double-click on 1.3.3 Account Intersection Form (AIF) to open the Account Intersection form.
22. You will be using this form for Exercise 3 so keep it open. You can save the file in Excel if you like.

End of exercise