

Smart View for Planning

Exercise 5: Saving Data in Excel and CalPlanning

For each scenario, indicate whether or not you need to be connected to Smart View. If the scenario has multiple parts, reference the last action to answer whether a Smart View connection is required.

Smart View Connection Required (Y/N)	Action	Scenario
		1. You have opened the Account Intersection Form for your Department or DeptID while connected to Oracle Hyperion Planning, Fusion Edition in Smart View to get the most current data in CalPlan and then saved the file in Excel. You would like to share the data with your DFL who is not a Smart View user.
		2. You would like to add some columns to the right of the form to explain the data and make recommendations for changes.
		3. You are meeting with people in your division to review and update plan data for next year using the Excel file you created and would like to make changes in the Excel file.
		4. You have made a number of changes to the data in Excel and reviewed them with your DFL who has approved them. Now you would like to load that data to CalPlan.
		5. You have loaded the changes to CalPlan and would like to check to be sure that the data was loaded correctly.

For each scenario in which a Smart View connection is required, enter the letter for the needed action.

- A. Save the file, [Ctrl+S] or File/Save As
- B. Submit Data
- C. Refresh

If additional steps are required, please note them here.

The next page has the answers.

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Answers

Smart View Connection Required (Y/N)	Action	Scenario
No		1. You have opened the Account Intersection Form for your Department or DeptID while connected to Oracle Hyperion Planning, Fusion Edition in Smart View to get the most current data in CalPlan and then saved the file in Excel. You would like to share the data with your DFL who is not a Smart View user.
No		2. You would like to add some columns to the right of the form to explain the data and make recommendations for changes.
No		3. You are meeting with people in your division to review and update plan data for next year using the Excel file you created and would like to make changes in the Excel file.
Yes	Submit Data	4. You have made a number of changes to the data in Excel and reviewed them with your DFL who has approved them. Now you would like to load that data to CalPlan.
Yes	Refresh (You may want to make a backup copy of the file first, just in case anything has changed.)	5. You have loaded the changes to CalPlan and would like to check to be sure that the data was loaded correctly.