

SmartView Connect

Enhancements for Oracle's Hyperion SmartView

Developed by RowlandSoftware



Users' and Administrators' Guide

Version 2.0.0

ORACLE

SmartView Connect

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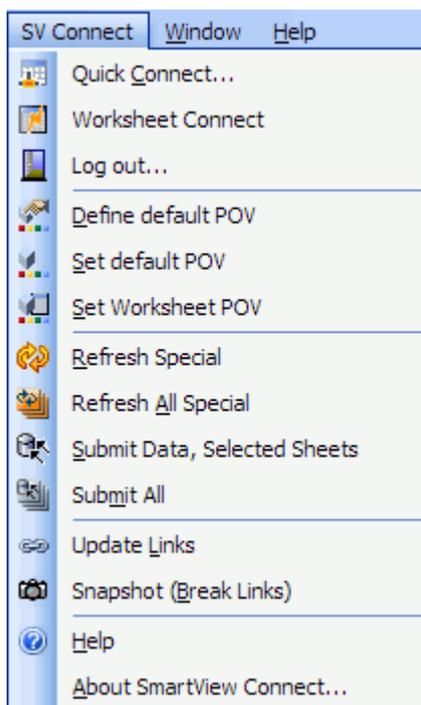
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Introduction

SmartView Connect™ enhances Oracle® Hyperion Smart View for Office. It consists of an add-in for Microsoft Excel that provides a SmartView menu and a toolbar with utility functions. Its principal features are:

- 'One click' setting of a user-defined default Point of View (which can also be set automatically when you connect)
- 'One click' setting of a Point of View stored in the active worksheet
- A Quick Connect and a Log Out button
- A Worksheet Connect button that creates a Connection, connects and sets the background Point of View.
- Enhanced Refresh and Submit Data options
- A facility to make a 'snapshot' of a spreadsheet at a point in time



The SmartView Connect menu

SmartView Connect therefore provides administrators with an easy way of distributing Connections and Points of View to users, and provides users with the convenience of their own default Point of View and 'one click' connect & set POV.

This version is particularly aimed at users of Hyperion Financial Management.

System Requirements

- SmartView client 9.3.1.0 or higher (9.3.1.4 or higher recommended)
- Microsoft Office 2003, 2007, 2010

Installation

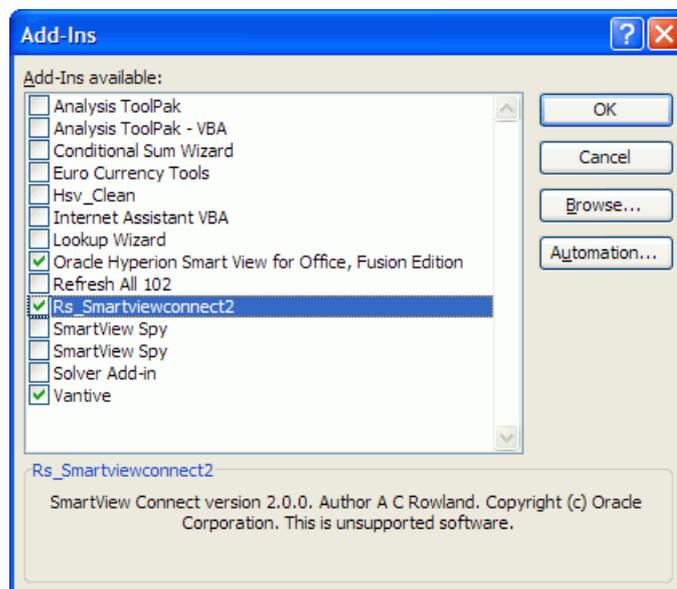
1. Unzip the files into a new directory, e.g. C:\Hyperion\SmartViewConnect.
2. In Excel, point to Tools -> Add-Ins...
3. Choose Browse and navigate to the XLA file in your new directory, e.g. C:\Hyperion\SmartViewConnect\RS_SmartviewConnect.xla
4. Choose OK.

Uninstalling

1. In Excel 2003 or earlier, point to Tools -> Add-Ins...
In Excel 2007 and later:
 - a. Click the Office Button
 - b. Choose Excel Options (button at bottom)
 - c. Select Add-Ins
 - d. At the very bottom, ensure 'Excel Add-ins' is selected in the Manage drop-down menu and choose Go
2. Deselect Rs_SmartViewConnect2
3. Close Excel and delete the files in the directory, e.g. C:\Hyperion\SmartViewConnect.
4. Open Excel and point to Tools -> Add-Ins... (repeat step 1)
5. Click Rs_SmartViewConnect—it will prompt you to remove it from the list. Choose Yes.

Disabling and Re-enabling SmartView Connect

Configure the addin through Tools -> Add-Ins... (see above)



Selecting and deselecting RS SmartView Connect 2 will enable and disable the SmartView menu and toolbar.

Using SmartView Connect

SmartView Connect presents both a toolbar and a menu. In Office 2007 and 2010, these are found in the Add-Ins tab of the Office ribbon.

Hover the mouse over the toolbar buttons to view a Tooltip describing the button's action.



The Default Point of View

Prior to SmartView 11.1.2.1, when you first connect to a data source, SmartView sets a default Background Point of View which is generally the first member of each dimension. This is rarely useful; for example, the year will probably be the first year that your application contains and not the current year. SmartView Connect allows each user to set a default Point of View and apply it with a single click or automatically when connecting. In 11.1.2.1 and later, SmartView saves a user Point of View on the server, so do not use SmartView Connect for this.

Background Point of View

The Background Point of View is administered in POV Manager and defines default members for each dimension. These are the members that are assumed whenever a dimension is omitted from a SmartView function.

The Background Point of View also forms the starting Point of View for new Adhoc Queries and Free Form Grids. After creation, however, Adhoc grids maintain their own Point of View and are independent of the Background Point of View.

Points of View are associated with Connections (not with a worksheet or workbook). One default POV may be defined per Connection. They are stored in the registry of your computer and if more than one person uses your PC, each may define different POVs.



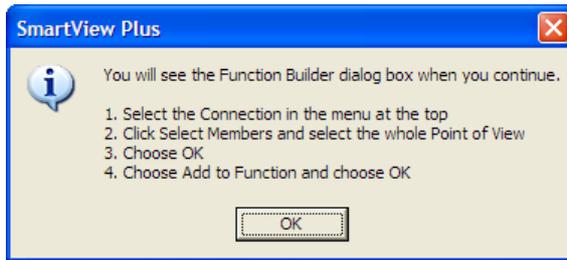
Define default POV

This procedure employs a trick using Function Builder to let you define a Point of View in the same way as you define the members for an HsGetValue function.

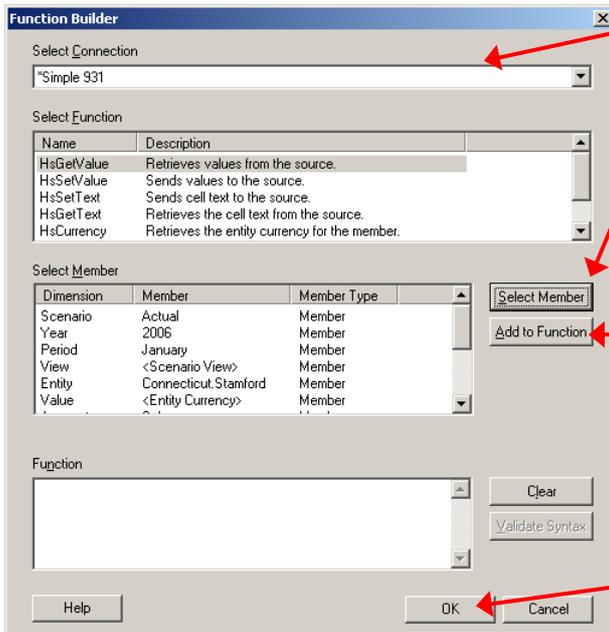
1. Ensure that the Connection for which you wish to define a Point of View is currently connected.

TIP If you have a saved Point of View that you want to use as your default, use POV Manager to set it as the active Point of View now.

2. Choose Define Default POV.

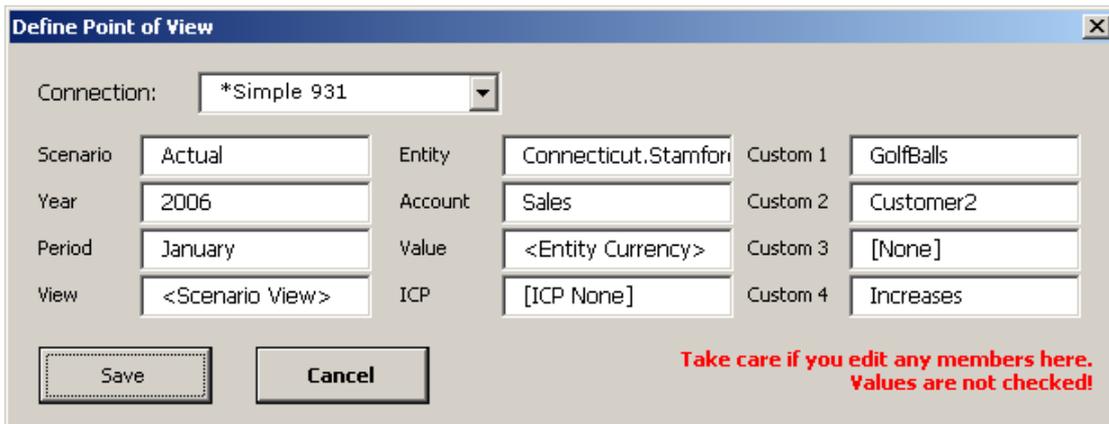


3. Read the instructions and choose OK.
- 4.



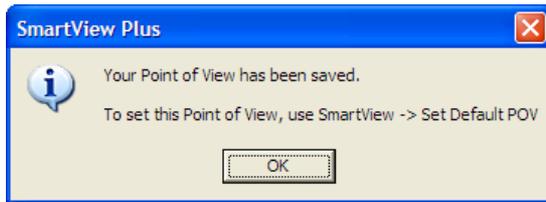
1. Select the Connection for which you want to define a POV
2. Choose Select Member
3. Set each dimension to the desired member
4. Choose OK
5. Choose Add to Function. Do not amend this formula in any way.
6. If you make a mistake and want to change it, choose Clear and then start over from step 2.
7. Choose OK.

5. Review the Point of View:



You can edit this dialog box, but you are advised not to. There is no validation of members after this point and invalid members would be accepted now but cause formulas to fail later.

6. Choose Save.

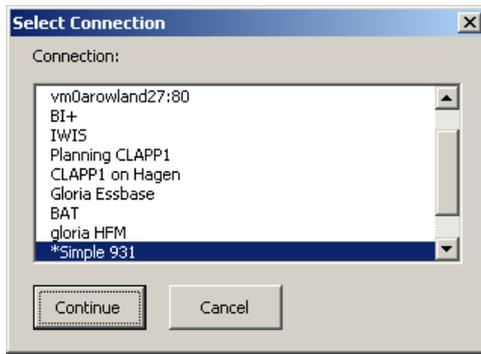


Choosing Save stores the Point of View you have just defined but does not automatically make it the current Background Point of View. Use *Set Default POV* to make it active.



Set Default POV

1. Choose Set Default POV.



2. Select the Connection for which you want to set the Point of View. (This Connection must be currently connected.)
3. Choose Continue. If you have not yet defined a Point of View for this Connection, you will be warned.

TIP You can also set the Default POV at the same time as you connect. See *Connecting and Disconnecting* below.

Edit Default POV

1. Set the Default Point of View you want to edit.
2. Choose Define Point of View and follow the steps above.

Copying Default Points of View

If you have identical applications, for example a Development and Production application, and want to copy a Point of View from one to the other, you can do it like this:

1. Log into both applications
2. If necessary, set the Default Point of View for the source application
3. Choose Define Point of View and select the **source** Connection

- When you see the *Define Point of View* preview screen, select the target Connection in the drop-down menu.

- Choose Save. This will define the Default Point of View for the target connection, using the members you had defined for the source connection.

Note that this method should only be used if the members can be guaranteed to be the same in both applications. It is possible to make manual amendments, but such changes are not validated in any way and may lead to an invalid Point of View being set.

The Worksheet Point of View

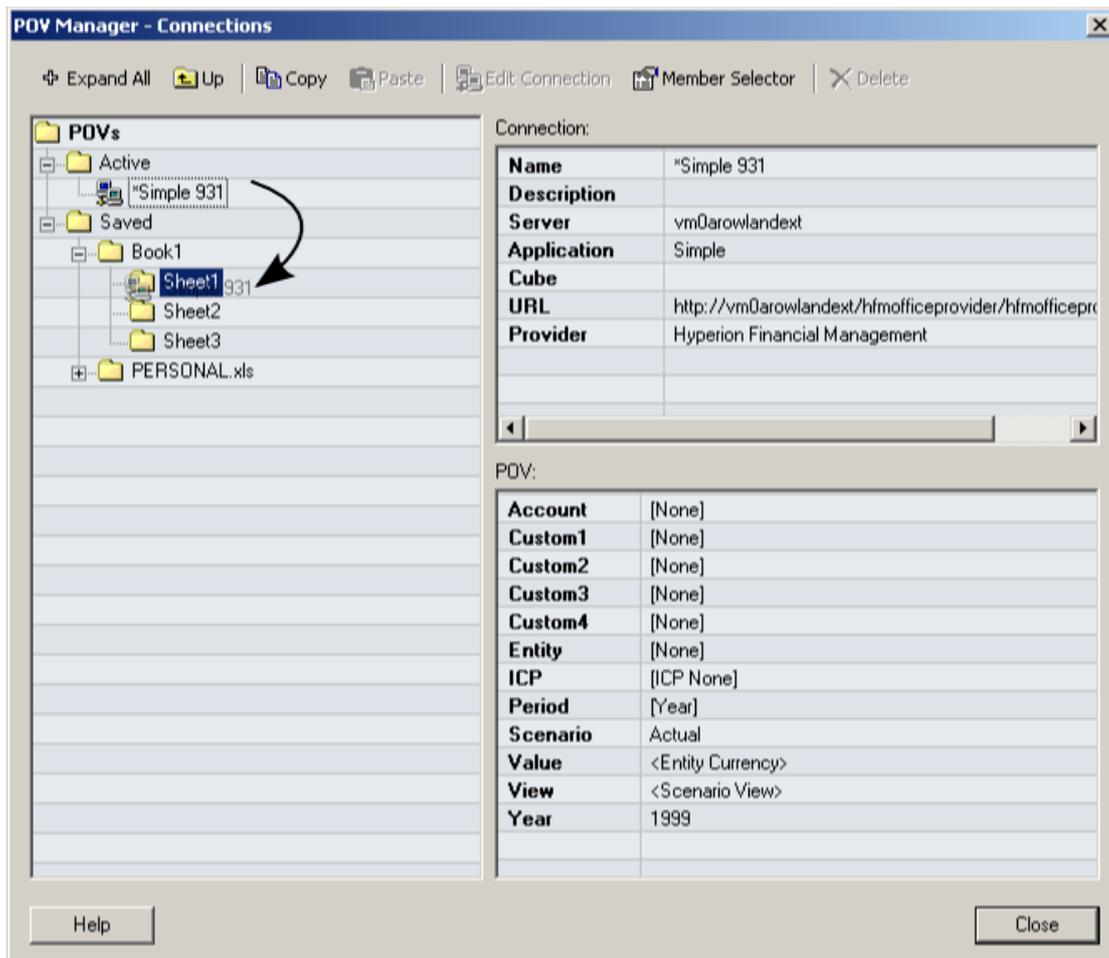
A worksheet Point of View is one that has been saved into a worksheet by dragging or copying the active POV in POV Manager. Once stored in the sheet, it is saved along with the workbook for use next time you open it, but it does not become the Active Point of View until you use POV Manager again to drag or copy it from the sheet to Active or use SmartView Connect's *Set Worksheet POV* button.

SmartView Connect supplies a means of refreshing a workbook with potentially a different Point of View for each sheet.

Saving a Worksheet Point of View

- Ensure you are connected
- In the SmartView ribbon, point to Functions → Manage POV... (Office 2003: Hyperion -> POV Manager...)
- Expand the Active folder and select the desired Connection
- Set the desired Point of View
- Expand the Saved folder, expand the destination workbook and drag the Connection into the worksheet in which you want to save the Point of View.
Alternatively, click Copy, then select the worksheet and click Paste
- Choose Close and save the workbook in the normal manner.

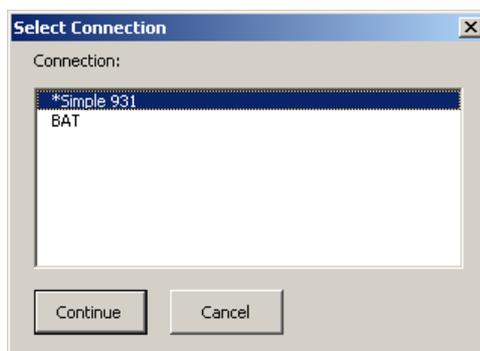
See illustration overleaf



Setting the Worksheet Point of View

Set Worksheet Point of View gives you a one-click way of setting the Background POV to one saved in the active worksheet.

1. Select the worksheet that contains the desired Point of View
2. Point to SmartView -> Set Worksheet POV or click the toolbar button
3. If the worksheet contains more than one saved POV, a dialog box will appear in which you select the relevant Connection. Choose Continue



4. The background Point of View will be set.

Connecting and Disconnecting



Quick Connect



Quick Connect does not, regrettably, speed up the connection time, but it does give you options to:

- Set a default Point of View (if defined) for the connection
- Make the connection the active connection for the current sheet
- Make the connection active for every sheet in the workbook.

Note that if any worksheets already have an active connection, their connection will be replaced by this one. This could cause the connection associated with existing Adhoc Queries to be changed.

Quick Connect does not offer a way of creating new connections. If you need to access the SmartView Panel, choose the Connection Manager icon to the right of the drop-down menu.

Setting the active connection is not supported in SmartView for Office 9.2 and earlier.



Log Out

This item:

- Disconnects all Connections
- Logs out the user permanently, so that a password must be entered to connect again.

Supported from SmartView 9.3.1.4 onwards.



Worksheet Connect

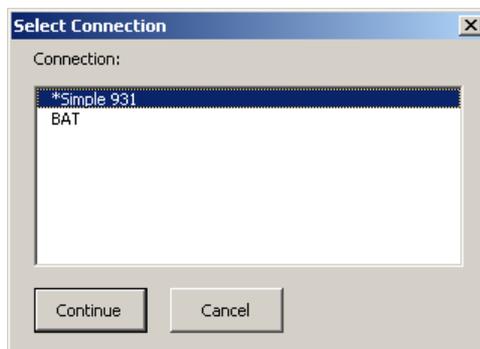
This item:

- Retrieves Connection information from a stored POV in the active worksheet

- Creates that private connection, if necessary
- Connects
- Sets the Point of View stored in the worksheet

It therefore provides administrators with a way of:

- Distributing Private Connections to users without needing to send out URLs and complicated instructions
 - Distributing background Points of View, if necessary on a sheet-by-sheet basis
1. Point to SmartView -> Worksheet Connect or click the button on the toolbar
 2. If there are more than one POV saved in the active worksheet, a dialog will appear in which you should select the desired Connection and choose Continue

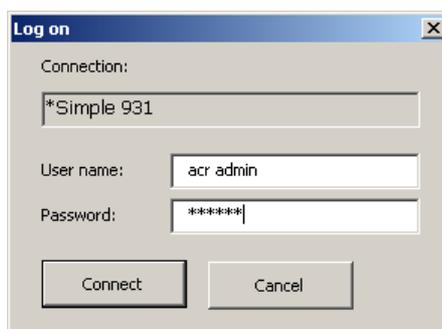


3. If a Connection of that name already exists on your machine, you will be asked whether you want to overwrite it:



Note: See Known Issues (page 14)

4. You will be prompted for username and password:



Enter your credentials and choose Connect

The Connection will be created and after some delay, you will be connected and the Point of View set.

Refreshing and Submitting Data



Refresh Special

This option first sets the Worksheet POV as the background POV and performs a Refresh.



Refresh All

As above, for each worksheet reading from left to right. Note that for any sheet that does not have a worksheet POV set, the background POV that applies is the most recently set.



Submit Data, Selected Sheets

As a normal Submit Data, but you may select multiple worksheets. Select the first sheet by clicking its tab, then press and hold Ctrl and add further sheets to the selection.



Submit All

Performs a Submit Data on each worksheet in the workbook.

Links and snapshots



Mending links

Sometimes when you share workbooks containing SmartView functions with colleagues, the functions get broken and are no longer recognised by Excel. The sign of this is that cells containing functions like HSGetValue show #NAME? and the function '=HSGetValue(...)' get expanded to something like '=C:\Hyperion\Smartview\bin\HsTBar.xla!HsGetValue(...)'. To resolve this problem, click the Update Links icon in the HsConnect toolbar.



Snapshots (break links)

Sometimes you want to make a snapshot in time of your spreadsheet, preventing users from changing the figures by refreshing in future. When you click the snapshot icon, it replaces all SmartView functions (and other Excel functions) with the current value. The spreadsheet can now longer be refreshed. As a further precaution, you might want to protect the workbook against changes.

NB Make sure to save the workbook under a new file name if you may wish to use the original file with its functions in future.

New in this release

Version 2.0

- Added Refresh and Submit options

Version 1.0

- SmartView for Office 9.2 and 9.3.0 are now deprecated
- Added support for SmartView 11.1.2
- Improved support for Office 2007

Known Issues

- With SmartView versions prior to 11.1.2, when you use Worksheet Connect, if you choose to overwrite the default Connection and there is more than one Connection defined, a different Connection will be marked as the default. However, after you close and re-open Excel the new Connection will always become the default. If you have an existing Connection that is correct and is marked as the default, we recommend that you do not overwrite it.

If you create a Connection with this tool and have functions that rely on the Default POV, set the Connection as default in Connection Manager prior to refreshing the formulas.

With SmartView version 11.1.2 or higher, the new Connection is always set as default immediately.

Support

Oracle does not support this product.

RowlandSoftware does not contract to support SmartView Connect, but you may request assistance by email (rowland_software@europe.com). Please report bugs, suggestions for improvement and documentation defects to the same address.

Exclusion of liability

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