

UMPlan – Install & Set-Up Smart View

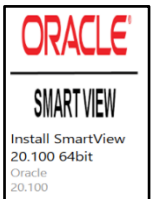
This guide has been prepared to provide you with a step-by-step instruction on installing the Oracle Smart View add-in for Microsoft Excel so that you can work on your budget through this option.

Before you start...

- You must close all MS Office programs (Word, Excel, Outlook) before beginning the installation process.

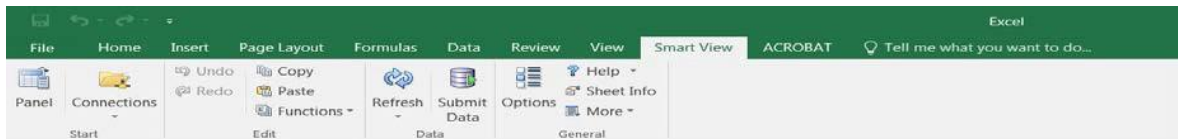
How to Install

- From the University of Manitoba Software Center, select **Oracle SmartView**.
- In the next page, click **Install** to begin.
- A window will appear confirming the installation has been successfully completed. You will need to restart your computer. You can now proceed with setting up SmartView to connect to UMPlan.

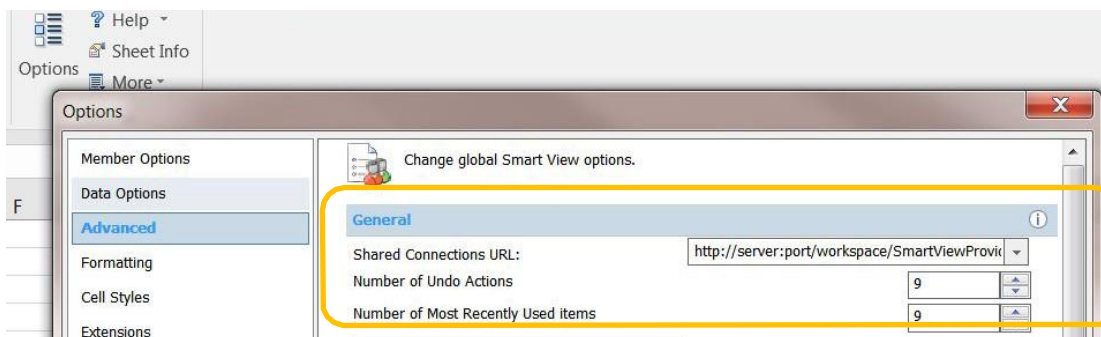


How to Set-up SmartView to connect to UMPlan

- Open a new Excel workbook. At the top of your screen in the Excel Ribbon, the **SmartView tab** is available.



- From the **SmartView tab** select the **Options button** – the following will be displayed. If the menu does not automatically open to the **Advanced menu** option, select **Advanced** from the left navigation menu



- In the **General Section** copy and paste or type the below link into the **Shared Connections URL** field <https://planning-a419910.pbcs.us2.oraclecloud.com/workspace/SmartViewProviders>

4. Select the **Data Options** menu from the left navigation menu. In the **Replacement** section update the following fields:

The screenshot shows the 'Data Options' dialog box with the 'Replacement' section highlighted by a yellow box. The 'Replacement' section contains the following fields and options:

- #NoData/Missing Label: #NumericZero
- #NoAccess Label: #No Access
- #Invalid/Meaningless: #Invalid
- Submit Zero
- Display Invalid Data
- Enable Essbase Format String

A callout box contains the following instructions:

- Use the drop down menu in the #NoData/MissingLabel field and change from #missing to #numericzero
- Then check off "submit zero"

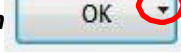
5. Select the **Formatting** option from the left navigation menu.

The screenshot shows the 'Options' dialog box with the 'Formatting' section highlighted by a yellow box. The 'Formatting' section contains the following options:

- Use Thousands Separator
- Use Cell Styles
- Use Excel Formatting
- Move Formatting on Operations
- Retain Numeric Formatting
- Adjust Column Width

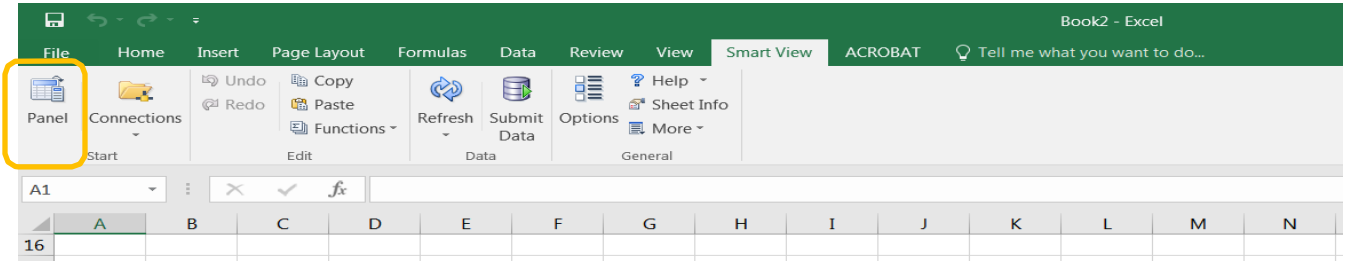
A callout box contains the following instruction:

It is recommended that you check off the box beside *Use Thousands Separator* and select the *Use Excel Formatting* toggle

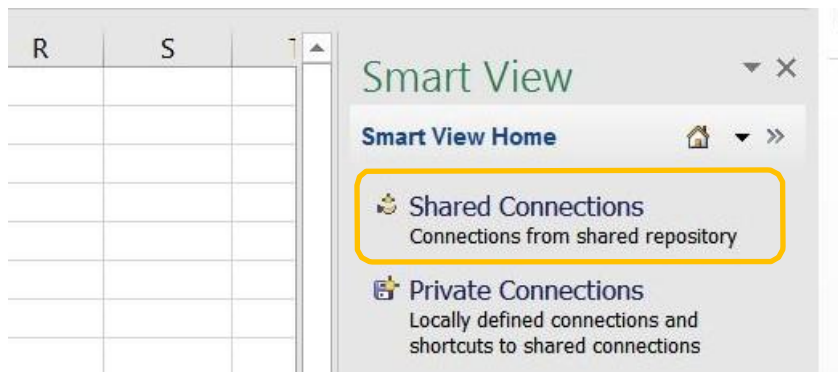
- Once the above steps are complete **click the arrow on the OK button**  to display the drop down menu and choose **Save as Default Options**.
- You have successfully setup your SmartView!**

How to Log In to UMPlan via SmartView

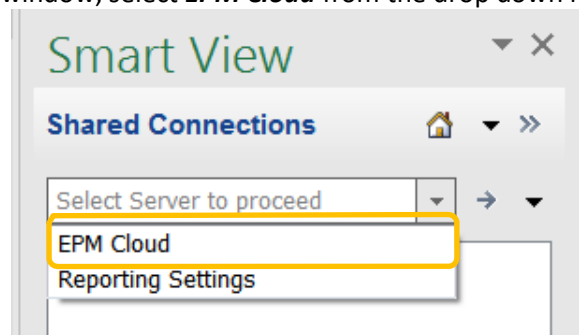
- Select the **Panel** button on SmartView ribbon



- A side panel menu will open. Choose the **Shared Connections** option



- A log in screen will be displayed – enter your **UMPlan login ID (email) and password** to continue
- On the right navigation window, select **EPM Cloud** from the drop down menu.



- Use the **+ symbols** to drill down to the available UMPlan forms. Select the desired form options to view and edit live in UMPlan!

Need Help?

Call the Aurora Finance Customer Service Helpline at **204.480.1001 ext. 5** or email us at umplan@umanitoba.ca