Oracle® Hyperion Smart View for Office Fusion Edition, Overview

An Oracle White Paper
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INTRODUCTION

Oracle® Hyperion Smart View for Office, (Smart View) provides a common Microsoft® Office interface for Oracle® Enterprise Performance Management (EPM) suite of products along with Business Intelligence (BI) data sources. Using Smart View, you can view, import, manipulate, distribute and share data in Microsoft® Excel, Word, Outlook and PowerPoint interfaces.

This paper provides an overview of the capabilities of Smart View that can be leveraged by organizations when interacting with Oracle Enterprise Performance Management (EPM) as well as Business Intelligence (BI) systems. For the purpose of this document EPM will include BI.

Note: Release 11.1.2 represents a major milestone for the Oracle EPM Suite of products with important new functionality and enhancements to several components. Smart View has accordingly been enhanced with a set of features to provide Office users a rich experience when interacting with EPM and BI data sources.

USAGE SCENARIOS

The Office environment is one of the predominant interfaces that power EPM and BI users, whose Smart View use usage can be classified as described below.

Ad Hoc Analysis

Ad hoc analysis is for users who use Excel to interactively investigate the data contained in the source(s), where they “slice and dice” the data. They may start with templates (such as East->Cola->Sales) or a blank sheet where they begin shaping and altering the grids of data as they work. Typically, users retrieve the data from Oracle EPM sources such as Essbase, Planning, Profitability or Financial Management using mouse clicks or drag and drop. Oracle Business Intelligence Enterprise Edition is also supported as a data source for Smart View.
<table>
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Recently used:
- AdHoc Grid
- Sample Grid
- Form

Oracle® Hyperion View for Office Fusion Edition, Overview
In the above example the user retrieves data in a grid to display Profit numbers for the whole Year and the entire Market. The Members colored in blue (and bolded) indicate that they have children and can be drilled into. The user is interested in seeing the data for all the markets. The member market is highlighted. The option “All Level” is chosen from the “Zoom In” dropdown on the Ribbon. The resulting grid shows the data for all the markets.

**Free Form Analysis** is a variant of ad hoc analysis where users can type in member names from a dimension on a spreadsheet and refresh the data.
In the example above the user changed the member Quarter I (qtr1) to Jan (by typing in directly to the cell) and refreshed the grid. Now that part of the grid is at the lowest level, cells that allow data entry are shown in yellow.

Moving members from **rows to columns** (and vice versa) is an operation that can be executed by end users. In the example below the member market has been moved to Columns from Rows by clicking the Pivot option in the Ribbon.

**EPM Application Interaction**

EPM application users who execute predefined input or reporting forms find Smart View a convenient way of completing tasks within Office. Such users are planners,
consolidators and the like who want to work in Excel for consistent experience compared to the web application or to tie other spreadsheet-based models into their process. For example, a company might use Smart View for Planning to incorporate data that is still housed in spreadsheet and workbook-based models.

The next three screens show the interaction of a Planner with Oracle Hyperion Planning.
The user opens up a tasklist called Human Resources. This consists of three tasks, one of which is completed. The task “Add New Hire Expenses” is being worked upon. After adding the Planned expenses on account of New Hires for the month of January, the user submits the data back to Planning and renames the Worksheet to New Hire Expenses. Writeback to Planning is allowed based on user privileges.

The next example illustrates a typical interaction of a HFM user working with Smart View.
### Consolidation Reports.xlsx - Microsoft Excel

#### Sheet 1: Sample_Sales

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<tr>
<th></th>
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<th>D</th>
<th>E</th>
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### Consolidation Reports.xlsx - Microsoft Excel

#### Sheet 2: Sample_Investment

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### Consolidation Reports.xlsx - Microsoft Excel

#### Sheet 3: Sample_Investment

<table>
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In the example above a HFM user opens a form. The user then updates the forecast numbers for the Cash and Sales for the month of August. The changes are then submitted back to the HFM.

**Pre-created Content Access**

Another area of use is for importing pre-created content, charts or grids, for example, from Reporting & Analysis products to PowerPoint, Word or Excel. The imported content can be refreshed from the Office environment.

A chart from a Financial Report imported into PowerPoint using Smart View.
Shown below is Balance Sheet (Report) imported into Word, using Smart View to access the content.

![Balance Sheet Image]

**Reporting**

Reporting is another dimension of Smart View usage which leverages the capabilities of EPM and BI data retrievals. Once the data is available within Office, you can create reports as needed based on a combination of data sources. For example, Planning and Financial Management data could be used to compare actual to budget. The ability to compare multiple scenarios, for different periods, etc., enables more complex reports. The power of Office can be used to create Reports in the Office environment, which can be refreshed as needed. What follows are the major categories under which we can break down reporting options for a Smart View user.

**Function Based Reporting**

This type of reporting is commonly used by EPM application users to access individual data points from one or more data sources. For example a Sales Report could have actual in the first column and forecast in the second column. The actual values could be from Oracle Hyperion Financial Management where as the forecast numbers could be from Oracle Hyperion Planning.

**Combined Data Display**

Smart View provides users the ability to display multi-data source on a single grid. For example, take the following grid:
The top portion of this grid (Unit Sales Information) is HFM data; the bottom portion consists of a grid consisting of Essbase data and a chart based on the same data.

Shown below is another example of combining data from multiple EPM sources.

“When accessing EPM sources, End Users can leverage native Office capabilities to create reports in Word, PowerPoint or Excel.”
Reporting in Word and PowerPoint
Smart View allows users to access data outside of Excel. This allows users to create memos with a placeholder for say the forecast numbers for the current quarter. The user can refresh that get the actual value on any given day. So if the numbers have been adjusted mid-quarter the new value is displayed.

Smart View users can create PowerPoint slides containing data from EPM and BI sources. Users can either use pre-created content as mentioned in the previous section or add data points allowing them to directly access the data source. Report controls such as sliders can be added to make the presentation more dynamic.

For both MS Word and PowerPoint the numbers are linked to the data sources and can therefore be analyzed using Excel. A single click action launches Excel with the number with its context enabling users to further analyze the data.

Outlook Integration
Smart View also provides integration points with Outlook. Planners can now import task lists to Outlook. They can then perform actions as included in a given task like opening a form. Task list integration is also supported for Oracle Hyperion Financial Management.

In the example below a HFM user is about to execute a task “Load Data” which is part of the task list named “HFM Task”. The next screen shows the other tasks associated with the task list as the users is about to execute the selected task.
CONCLUSION

Historically speaking, many Excel-based add-ins, were available to access EPM Suite of products. Smart View provides a convergence of these technologies into a single client with which Office users can leverage EPM data.

Smart View allows for application access (HFM, Planning for example), ad hoc analysis queries (Oracle® Business Intelligence Enterprise Edition, Essbase, Planning, etc.) and existing Reporting & Analysis content import. Smart View is not just an Excel add-in; instead it is an Office add-in with functionality in:

Smart View allows Planning and HFM task list integration in Outlook.

The user can use Outlook to execute tasks associated with a task list.
• Excel
• Word
• PowerPoint
• Outlook

The ability to copy and paste data points across Microsoft® Office (Excel, Word, PowerPoint) provides an easy mechanism for moving relevant data points from one application to another.

Smart View makes EPM and BI data (Oracle® Business Intelligence Enterprise Edition) available via Microsoft® Office in a useful manner. Providing information within the productivity applications where users spend most of the day allows everyone in an enterprise to do their jobs better.
APPENDIX

Platform Support

Smart View 11.1.2 is supported for Microsoft® Office 2003 and 2007.

For additional information on the Supported Platform Matrix, click here: http://www.oracle.com/technology/products/bi/hyperion-supported-platforms.html

Supported Data Sources

Smart View works with the following data sources:

1. Essbase
2. Oracle Hyperion Financial Management
3. Oracle Hyperion Planning
4. Hyperion Enterprise
5. Hyperion Reporting & Analysis
   a. Financial Reporting
   b. Interactive Reporting
   c. Production reporting
   d. Web Analysis
6. Oracle BI EE


Architecture

It is important to understand the architecture in order to effectively deploy Smart View solutions for an enterprise. The Smart View client is an add-in that allows Microsoft® Office users to access EPM and BI data sources. Smart View accesses data sources, via a middle tier commonly referred to as a 'provider'. Each product that Smart View accesses data from will come with a provider. For example when you install Essbase you install APS (Analytic Provider Services) and this acts as the provider for Essbase data. When you install Financial Management it will also install its data provider.

Regardless of the product, all the providers require a web application server (WebLogic, for example) for deployment. The application server and the deployment will be part of the product installation. See the products documentation for detailed information on how to install and configure the products provider.

The Smart View client communicates with each of the providers using http or https and xml. The providers then communicate with each of their data sources using native API's or a protocol that is best suited for that provider. Then the providers return XML via http or https back to the Smart View client.
For additional information on deploying Smart View consult the Smart View and the products (data source) documentation.

http://www.oracle.com/technology/documentation/epm.html