

## Hyperion Smart View 9.3.1 for Financial Management

**Duration:** 1 Day

### What you will learn

Smart View enables business users to access and analyze data from various Hyperion data sources. In this course, you learn how to use Smart View to query, consolidate, and analyze data from Financial Management applications. You learn how to create ad hoc queries, free-form grids, and advanced reports. You also learn how to enter and submit data using data forms. You then learn how to embed dynamic data points into Microsoft Office documents, and to retrieve and submit data using functions. Finally, you learn how to import Reporting and Analysis content into Excel, Word, and PowerPoint. Exercises provide hands-on practice.

Learn To: Import Financial Management data into Microsoft Office documents  
Retrieve and submit data using Smart View functions  
Enter and analyze Financial Management data using Smart View

### Audience

Application Developers  
End Users

### Prerequisites

*Required Prerequisites*

Familiarity with Financial Management concepts and terms

Familiarity with Microsoft Excel, Word, and PowerPoint

### Course Objectives

Enter and submit data in data forms  
Create ad hoc queries and advanced reports  
Embed dynamic data points in Microsoft Office documents  
Retrieve and submit data through functions  
Import Reporting and Analysis documents into Microsoft Office  
Connect to Financial Management

### Course Topics

#### Introduction to Smart View

Smart View Overview  
Installing Smart View  
Smart View Excel Interface  
Smart View and Hyperion Retrieve  
Data Source Providers  
Managing Database Connections with Connection Manager

#### Entering Data using Data Forms

Associating a Data Source with a Worksheet  
Data Forms Overview  
Selecting a Data Form

- Selecting Multiple Data Forms
- Selecting Members in Data Forms
- Adjusting Data Values
- Creating Excel Formulas and Cell References in Data Forms
- Submitting Data

### **Analyzing Data Using the Ad Hoc Analysis Tools**

- Creating Ad Hoc Grids
- Adding Dimensions
- Keeping and Removing Dimensions
- Creating Ad Hoc Grids using Member Selections
- Managing the Point of View using the POV Manager
- Setting Smart View Options
- Viewing Qualified Names for Members
- Displaying Duplicate Member Names

### **Creating Advanced Financial Management Reports**

- Creating and Executing Queries with Query Designer
- Valid and Invalid Free-form Grids
- Creating Reports in Free-form Mode
- Resolving Member Names in Free-form Grids
- Formatting Free-form Reports
- Leveraging Excel Formulas in Free-form Grids

### **Embedding Dynamic Data Points**

- Embedding Data in Word and PowerPoint
- Viewing the POV for Data Points in Word and PowerPoint
- Changing the POV in Word and PowerPoint
- Managing the POV for Multiple Applications

### **Retrieving and Submitting Data Using Functions**

- Functions Overview
- Creating Functions using Function Builder
- Creating Functions Manually
- Editing and Refreshing Functions
- Identifying Common Function Error Codes
- Setting the POV in POV Manager

### **Importing Reporting and Analysis Documents into Microsoft Office**

- Integration Overview
- Import Formats
- Importing Financial Reporting Documents
- Importing Web Analysis Documents
- Editing and Refreshing Reporting and Analysis Documents

### **Appendix A: Customizing Worksheets with the VBA Toolkit**

- Customization Overview
- Working with Smart View VBA Functions
- Customizing VBA Functions