



UCMPLAN

Install Oracle Smart View (PC)

January 26, 2021

Final

Download and Install Oracle Smart View

Oracle Smart View is a Microsoft Excel-based analysis tool that allows quick and hoc reporting on budgeting data on Oracle tools. It allows drag and drop, drill down and pivoting options to manipulate data. Smart View reports can be saved offline and refreshed with the latest, real time budgeting data from UCMPLAN.

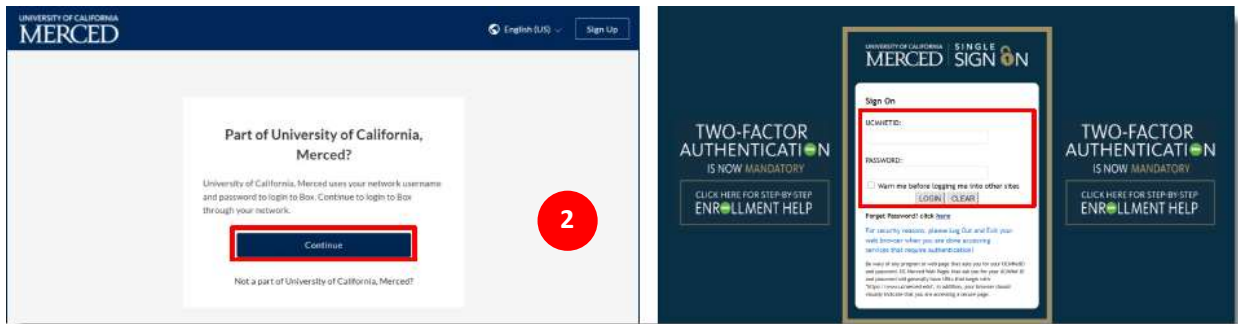
All UCMPLAN users have access to Smart View. This download and installation process is a one-time activity. Mac users please refer to different instructions.

System Steps:

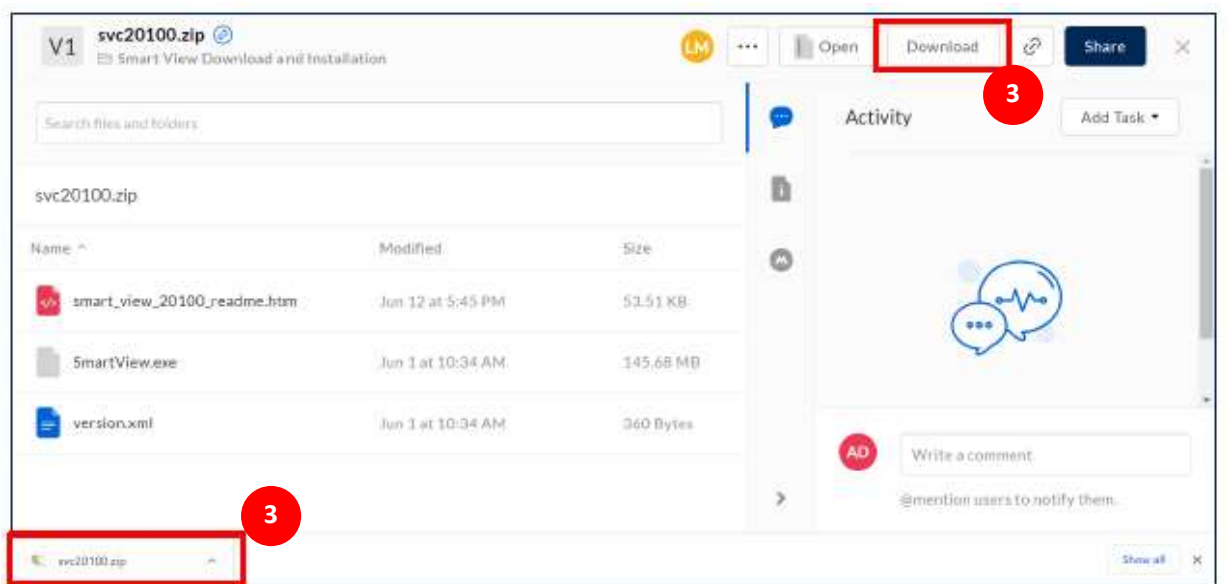
1. Access the Smart View application from Box. Click the link below or type it into your web browser.

<https://ucmerced.box.com/s/d5y7d6odkd3it0mbm9dfxdio9rvp09jd>

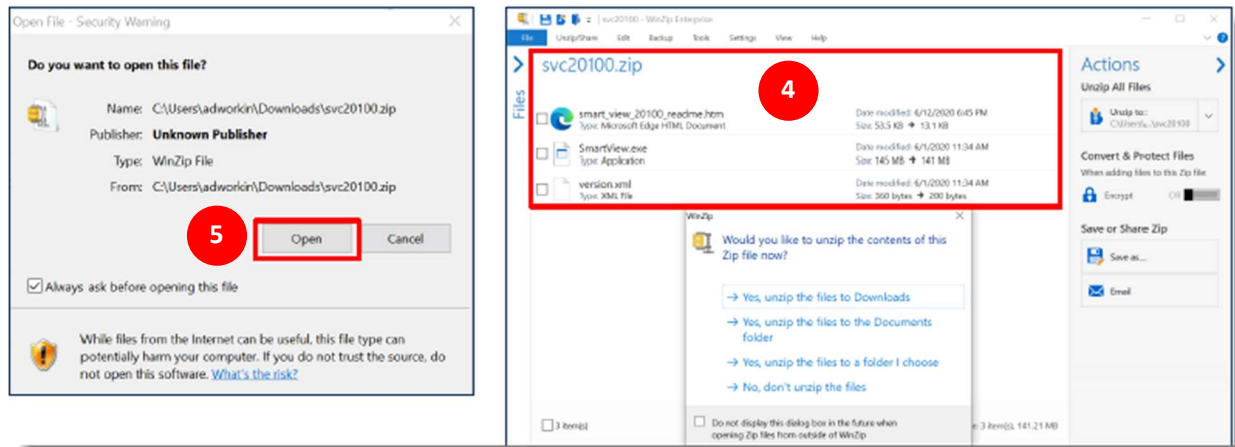
2. If prompted, log in using your UCMNetID single Sign on Credentials.



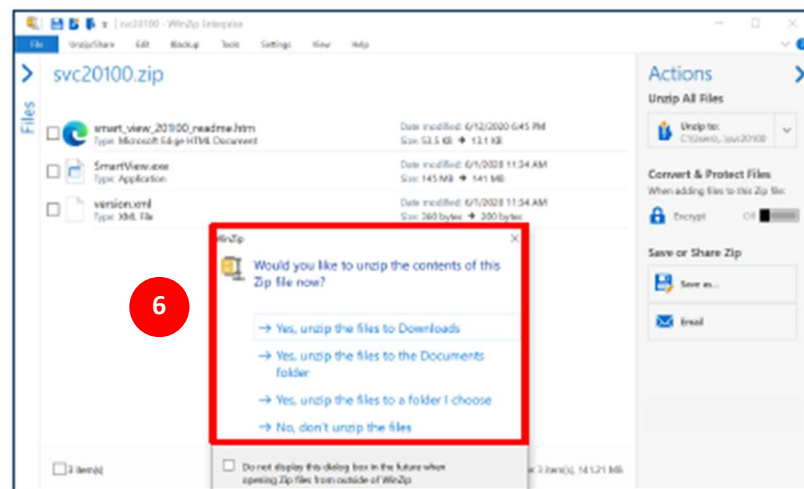
3. Download the Smart View .zip file by clicking **Download**.
The file is large, so it may take a few minutes to download.



4. **Open** the downloaded .zip file.
5. If prompted with a security warning, click **Open**. The .zip file will open in your File Explorer.



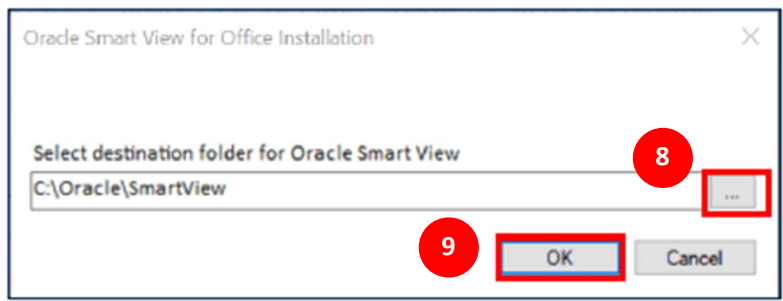
6. **Unzip**, or extract, the contents of the .zip file. Select the destination, such as your Downloads folder or your Desktop. Remember the destination location where you are extracting the contents. Once the contents are extracted, locate the SmartView.exe application in the destination location.



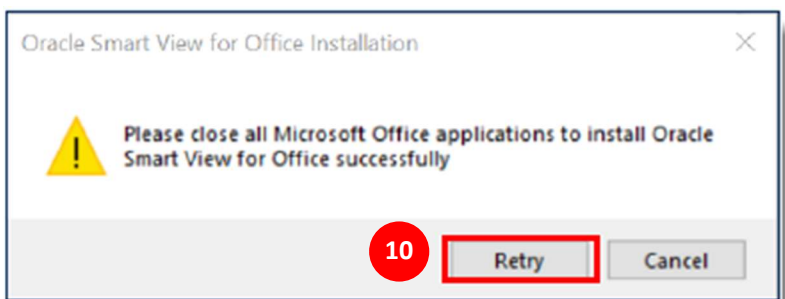
7. Open the **SmartView.exe** application file to begin the installation.



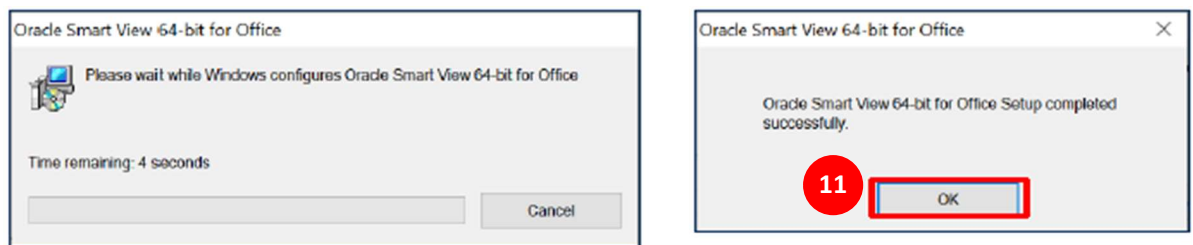
8. When be prompted to select a destination folder, use the file explorer icon to the right on the field to select the destination, for example Downloads or Desktop.
9. Click **OK**.



10. **Note:** If you have any other Microsoft applications open, you must close those applications and retry the installation.

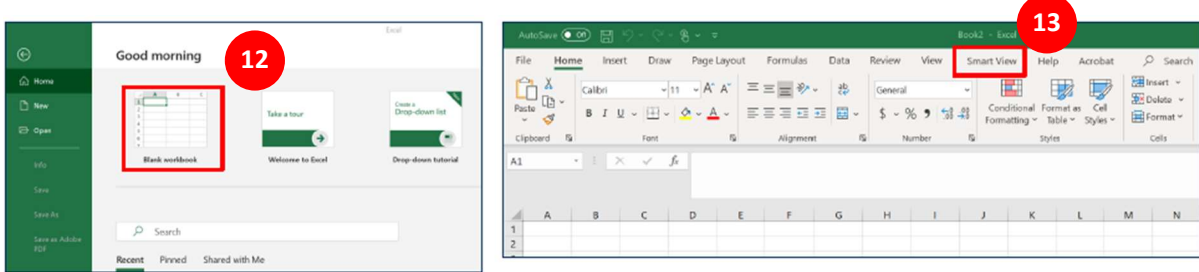


11. The Oracle Smart View application will automatically install. The installation may take a few minutes while Windows completes the configuration. Once the setup is complete, a pop-up message will display confirming the setup completed successfully. Click **OK**.



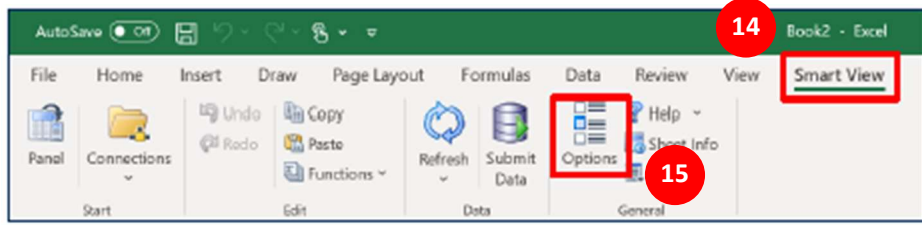
12. To verify the Smart View installation, **open** a new blank workbook in **Microsoft Excel**.

13. Verify that the **Smart View** tab now appears in the ribbon.



14. Next, set up the shared connection between your Smart View and the UCMPPLAN system.
Click the **Smart View** tab in the Excel ribbon.

15. Under the Smart Tab, click **Options**.

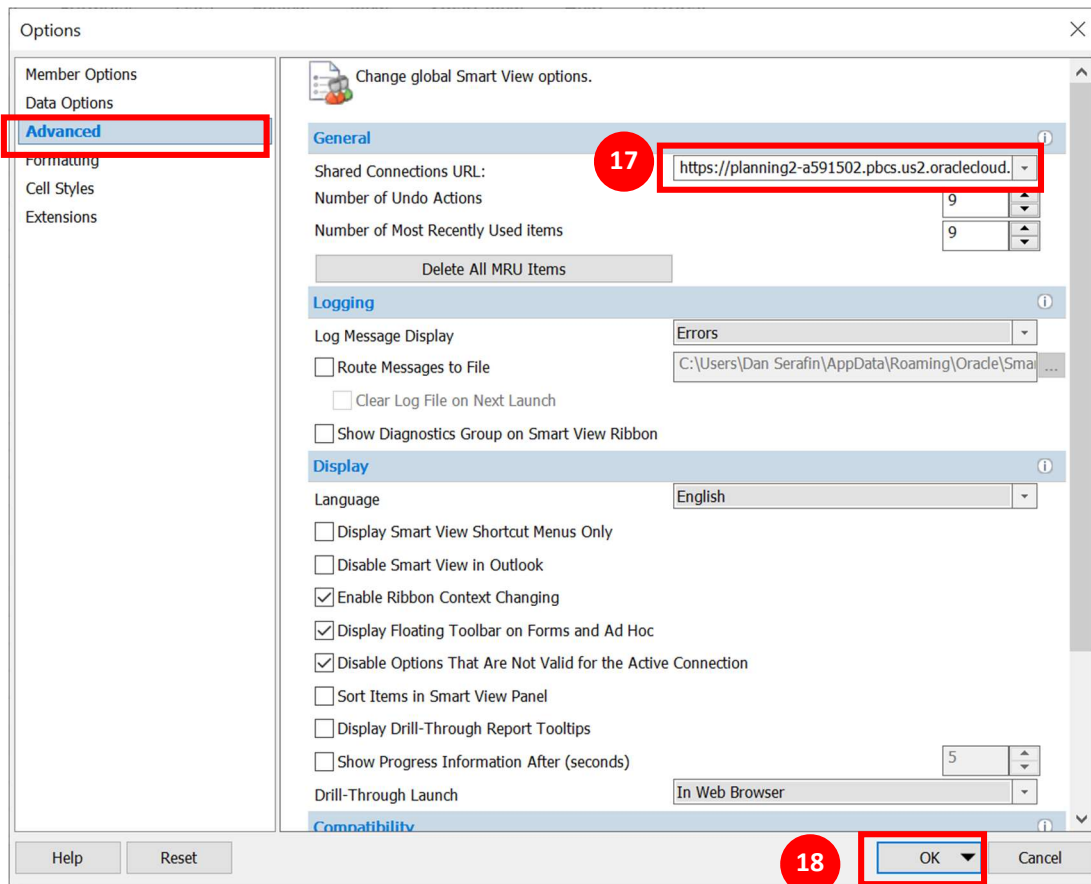


16. The Options window displays, click **Advanced**.

17. Under the General section, locate the **Shared Connections URL** field. Replace the default link with the link below.

<https://planning-a591502.pbc.us2.oraclecloud.com/workspace/SmartViewProviders>

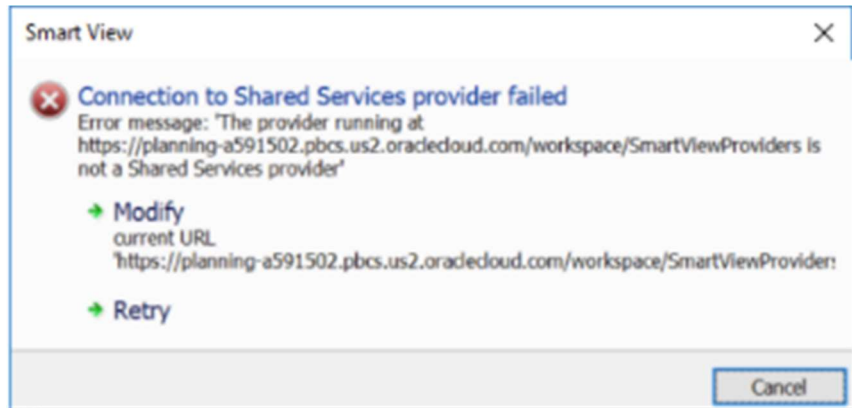
18. Click the **OK** button.



The Oracle Smart View application is now installed and ready for use. For instruction on how to use the tool, please refer to additional training materials.

Troubleshooting

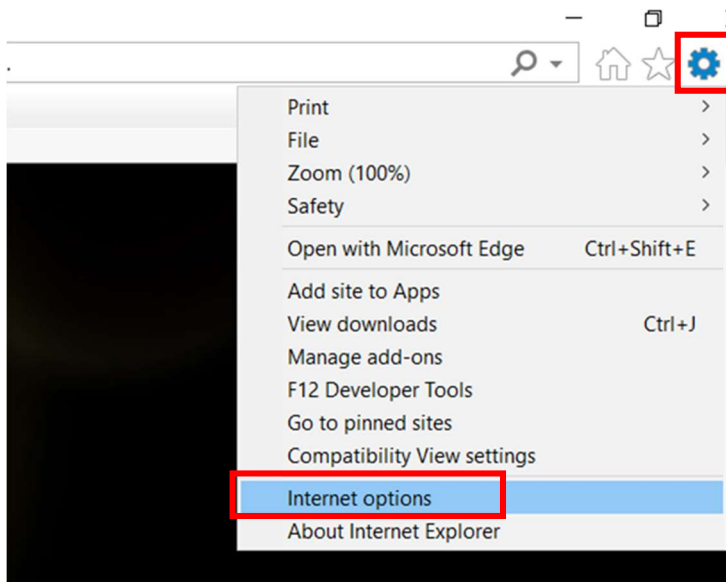
Should you receive the error message below, Smart View is not successfully connecting to the server.



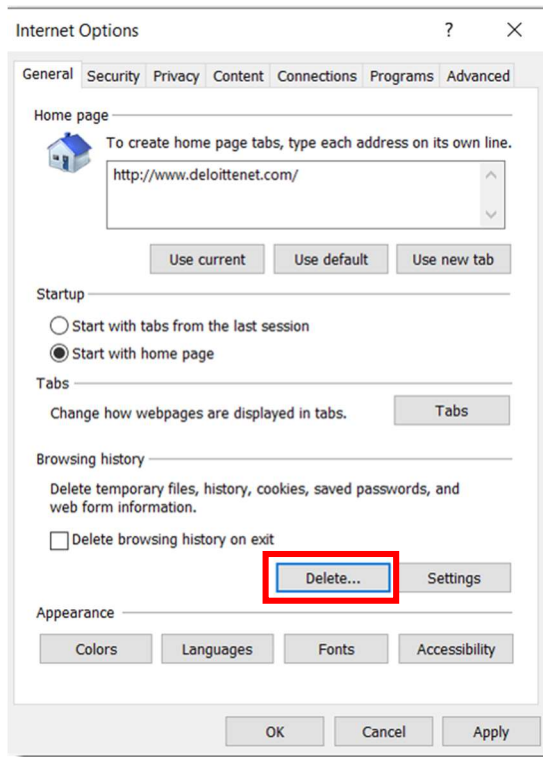
To address this issue, clear Browsing History, including cookies and temporary internet files in **Internet Explorer**.

Note: Perform the following steps **even if your default browser is not Internet explorer**, Smart View internally uses IE even if the user's default browser is Mozilla, Chrome, or anything else.

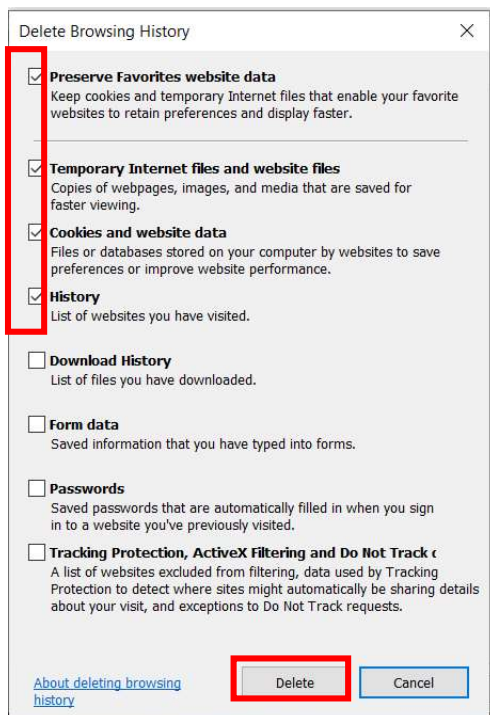
1. Launch an Internet Explorer browser window.
2. Navigate to Options.
 - a. Go to Tools (the gear icon) > Internet Options



3. In the dialog box below, click on the **Delete...** button in the Browsing History section.



The **Delete Browsing History** pop-up window displays.



4. Confirm the selections above match your settings. Click the **Delete** button.
5. Retry logging in to smart view.