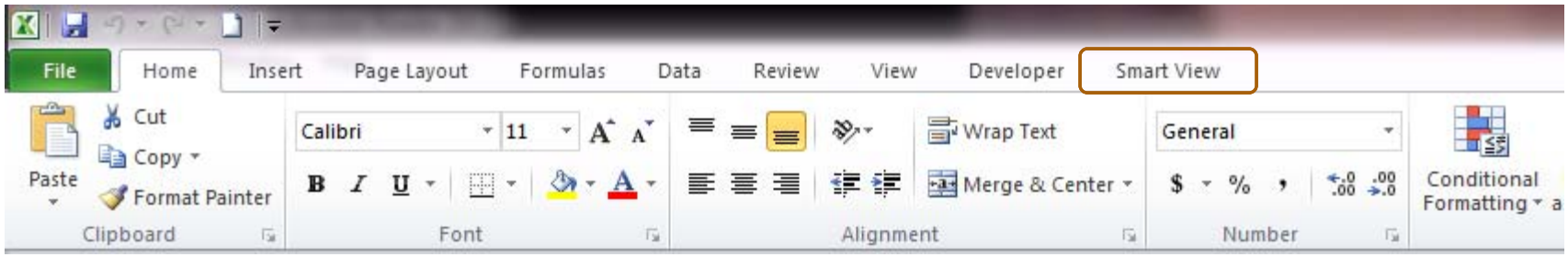
Smart View Training

Smart View- Set up

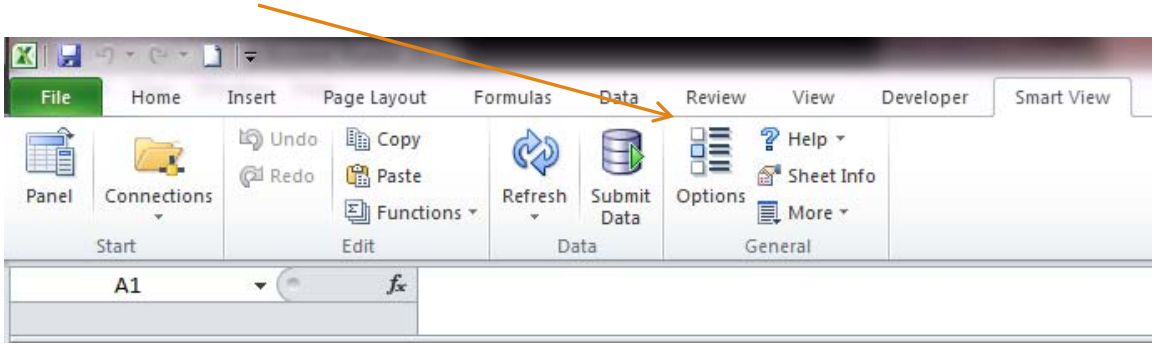
The Smart View add on must be added by the Information Technology Department

Initial Set-up in Microsoft Word

- Click Smart View tab on tools ribbon



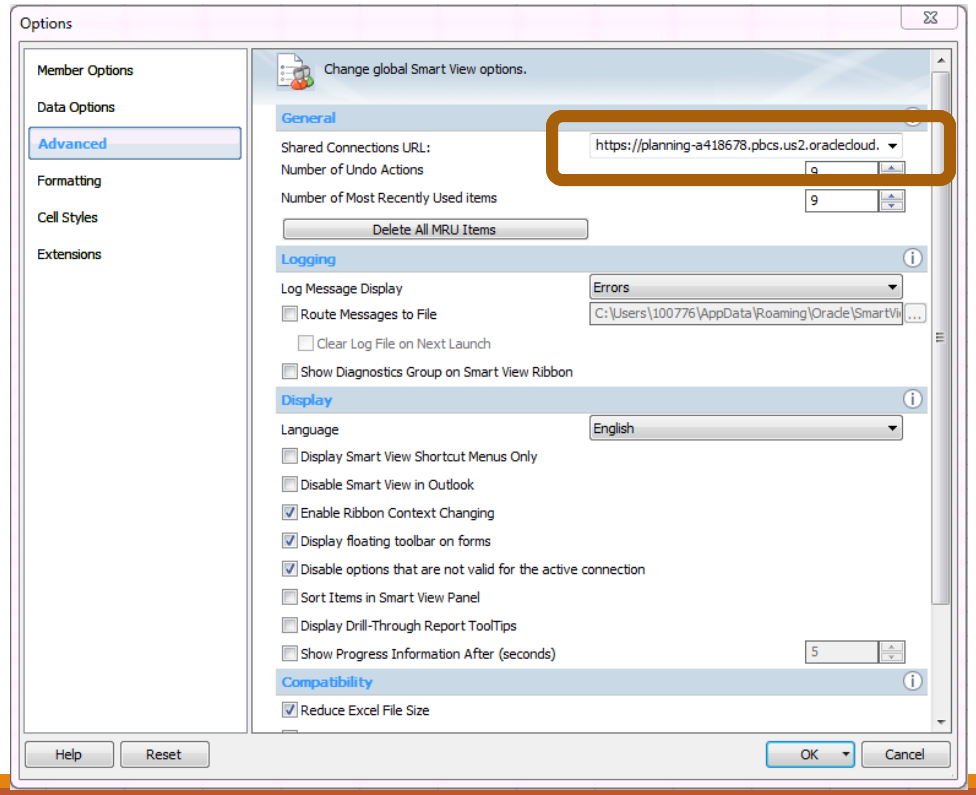
- Click on Options



Smart View – Set up

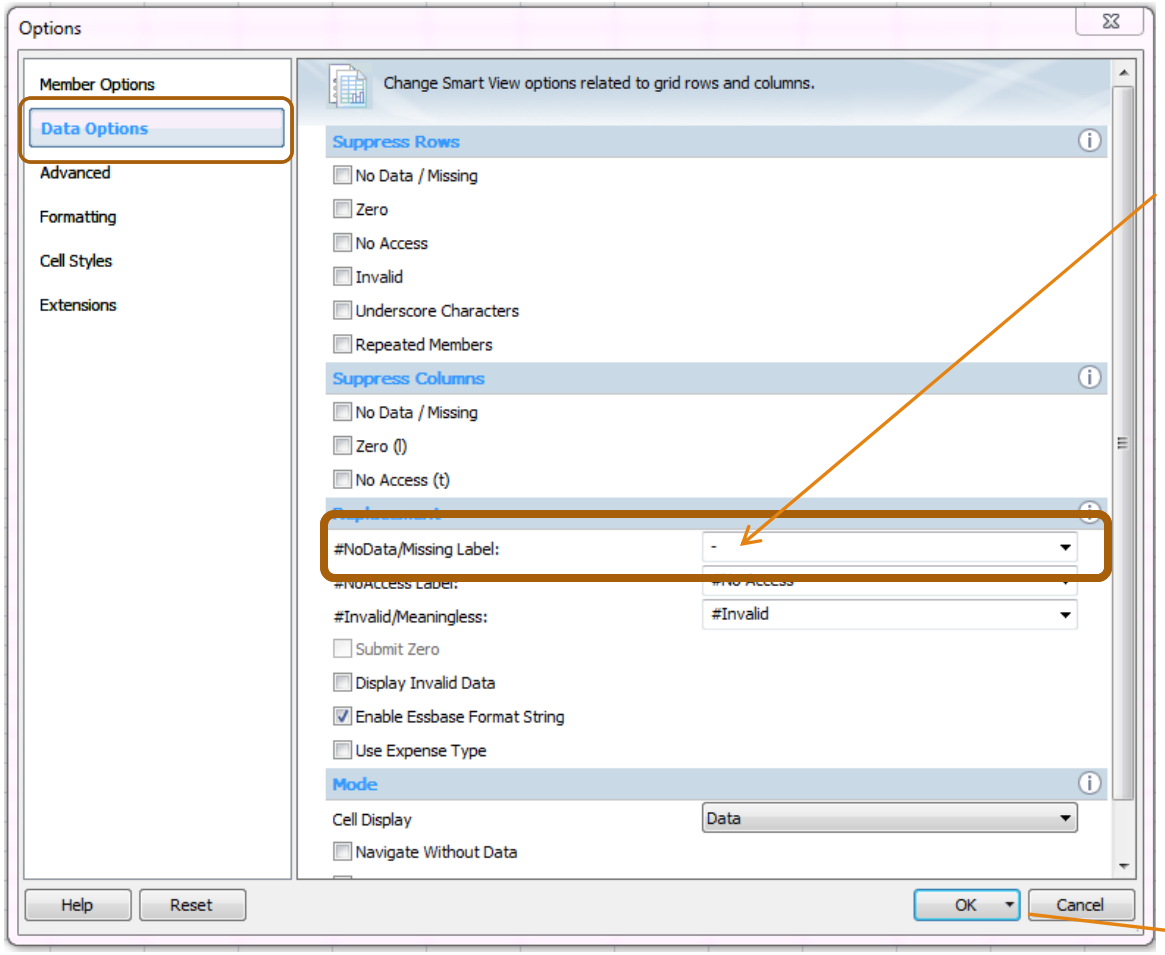
- Select Advanced on the right side of the Options pop up window
- Under General, Shared connections URL, Enter the following URL:

https://planning-a418678.pbcs.us2.oraclecloud.com/workspace/ SmartViewProviders



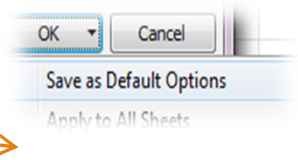
Smart View – Set up

Next, select Data Options on the right side of the Options pop up



Enter a dash (-) manually. Otherwise, cells with no amount in them will show "#Missing"

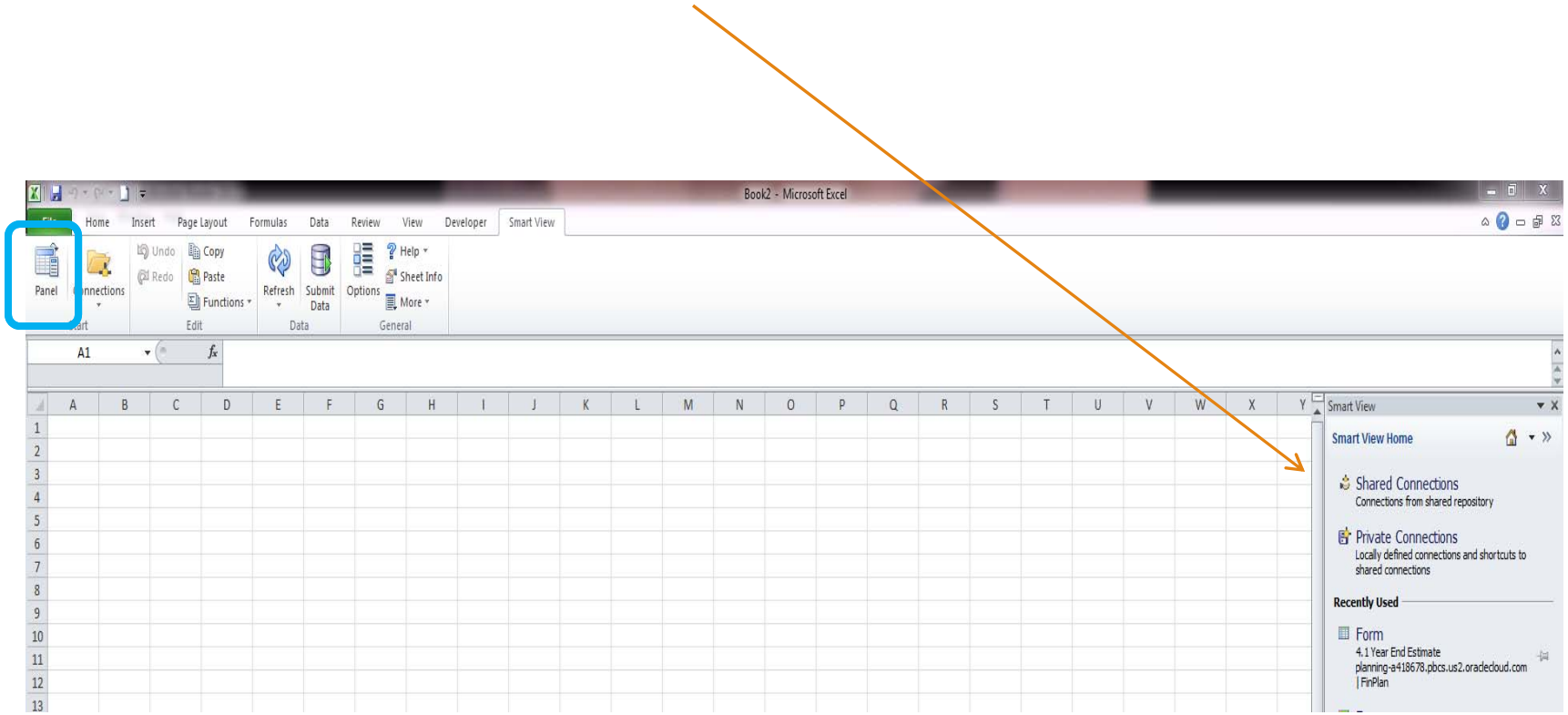
In OK box, click the drop down arrow and select "Save as Default Options"



Smart View – Login

In Smart View tab

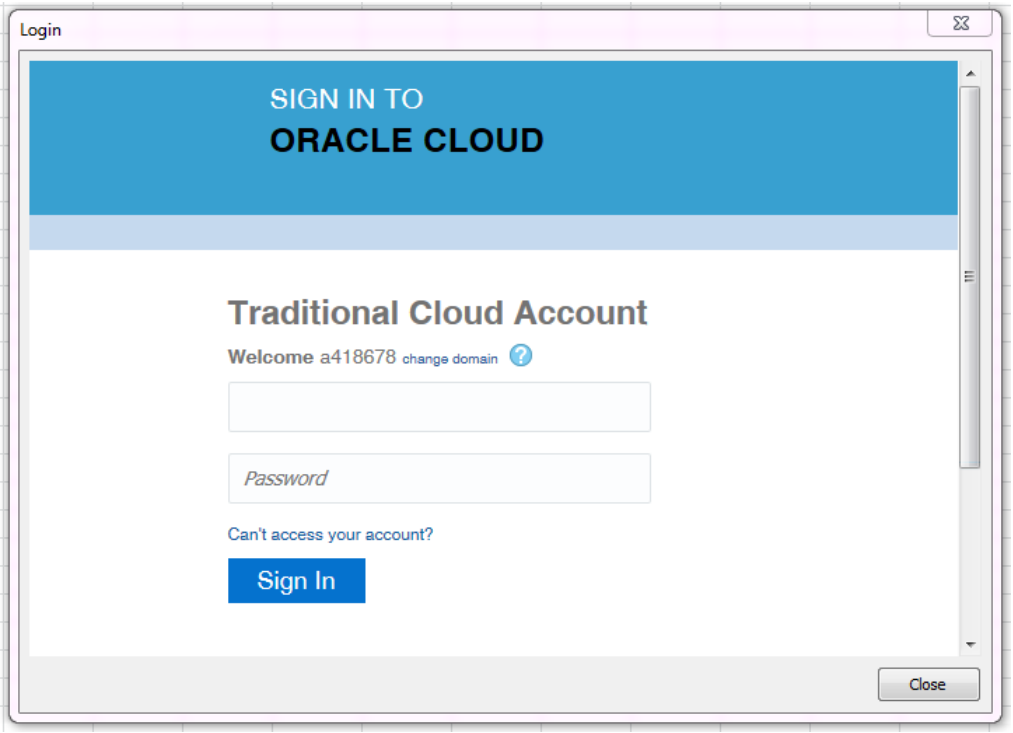
- Select Panel on the left side
  - Smart View Home will then appear on the right side of the screen
- Click Shared Connections



Smart View – Login

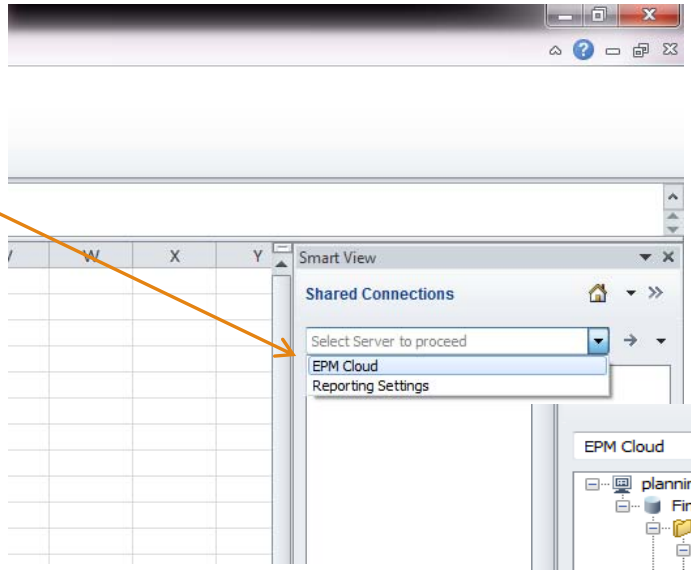
Login screen will appear

- Use Oracle Cloud username and password to login

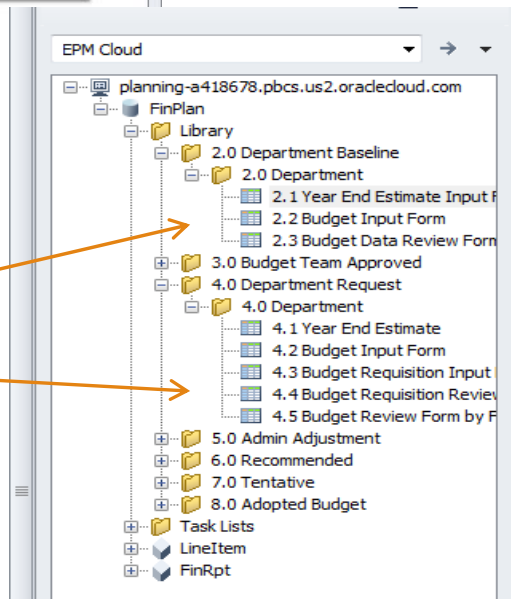


Smart View – Upload to Oracle Cloud

On the right side, use drop down menu to select EPM Cloud



- Drill down to Department to see forms available in each stage by clicking on the + next to each level



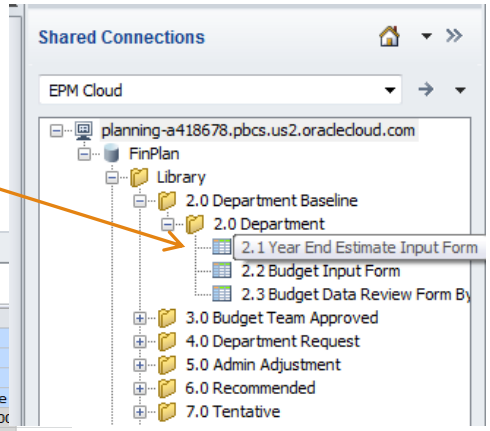
The format for the forms is the same as Oracle Cloud

Smart View – Upload to Oracle Cloud

Click on the current stage (2.0 and 4.0 are Department Involvement Stages)

- Then choose the form for that stage
  - Changes are made in the yellow column only

Note: The Department and Fund can be changed in the drop down menus at the top of each form. Once the change is made, select the Refresh button.



00100 GENERAL FUND | 3002 ADLT PROB-GRAFFITI ABATE | Refresh

AB7

	A	B	C	D	E	F	G	X	Y
1			Actual		Amended	Actual	Initial Bas	artment Basel	
2			FY2017	FY2018	FY2019	FY2019	FY2019	FY2019	
3			Final	Final	Final	Final	YE Estimat	YE Estimate	
4			YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	+YearTotal	Variance
5	40110 REGULAR SALA	02	36866	37661	37301	16095	37301	37301	0.0
6	40170 COMPENSATIC	02	-	-	899	-	899	899	0.00
7	40210 SOCIAL SECUR	02	2091	2131	2313	906	2313	2313	0.00
8	40211 MEDICARE CO	02	489	498	541	212	541	541	0.00
9	40220 ARIZONA STA	02	4214	4290	4402	1899	4402	4402	0.00
10	40223 CORRECTIONS	02	34	0	-	-	-	-	
11	40230 HEALTH INSUR	02	7470	7559	7559	3150	7559	7559	0.00
12	40231 EMPLOYEE ASS	02	19	19	19	8	19	19	0.00
13	40233 LIFE INSURAN	02	42	41	42	18	42	42	0.00
14	40241 WORKERS' CO	02	700	331	328	142	328	328	0.00
15	40280 OTHER EMPLO	02	3617	3600	3600	1500	3600	3600	0.00
16	40001 TOTAL PERSON	All Functi	55542	56130	57004	23930	57004	57004	0.00
17	41010 GENERAL CON	02	5701	3873	3000	1047	3000	3000	0.00
18	41101 OFFICE SUPPL	02	300	318	500	22	500	500	0.00
19	41260 FUEL, OIL, AN	02	1847	1794	4000	4000	3996	3996	0.00
20	41280 CLOTHING, UN	02	-	249	-	-	-	-	
21	41320 PAINTING SUP	02	177	0	100	-	100	100	0.00
22	41360 MOTOR VEHIC	02	-	-	-	-	-	-	
23	41380 COMMUNICAT	02	-	-	-	-	-	-	
24	41502 SMALL TOOLS	02	1463	1980	2041	-	2041	2041	0.00
25	42241 REFUSE DISPO	02	144	126	200	-	200	200	0.00
26	42310 TELEPHONE	02	590	753	520	156	520	520	0.00
27	42410 TRAVEL EXPEN	02	319	659	100	-	100	100	0.00
28	43013 COMMUNICAT	02	-	1673	-	-	-	-	
29	43021 AUTOMOTIVE	02	1970	861	2100	165	2100	2100	0.00
30	43430 DUES AND ME	02	33	33	50	1	50	50	0.00
31	43460 TRAINING AN	02	-	295	-	-	-	-	
32	40000 TOTAL SUPPLI	All Functi	12544	12614	12611	5391	12607	12607	0.00
33	Net Change in Fund	All Functi	-68086	-68744	-69615	-29321	-69611	-69611	0.00
34									

Smart View – Upload to Oracle Cloud

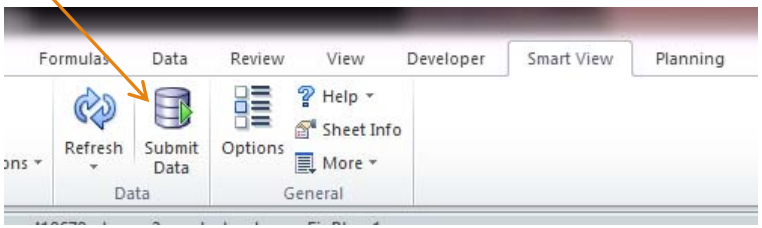
Next, enter the amount

- The cells will turn a darker shade of yellow when a change is made

A	B	C	D	E	F	G	X	Y	Z
		Actual		Amended	Actual	Initial Bas	rtment Bas		
		FY2017	FY2018	FY2019	FY2019	FY2019	FY2019		
		Final	Final	Final	Final	YE Estimat	YE Estimate		
		YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	+YearTotal	Variance	
40110 REG	02	36866	37661	37301	16095	37301	1200	0.00	
40170 CON	02	-	-	899	-	899	899	0.00	
40210 SOC	02	2091	2131	2313	906	2313	2313	0.00	

- Once changes are made to the amount, select "Submit Data" for the changes to upload into Oracle Cloud.

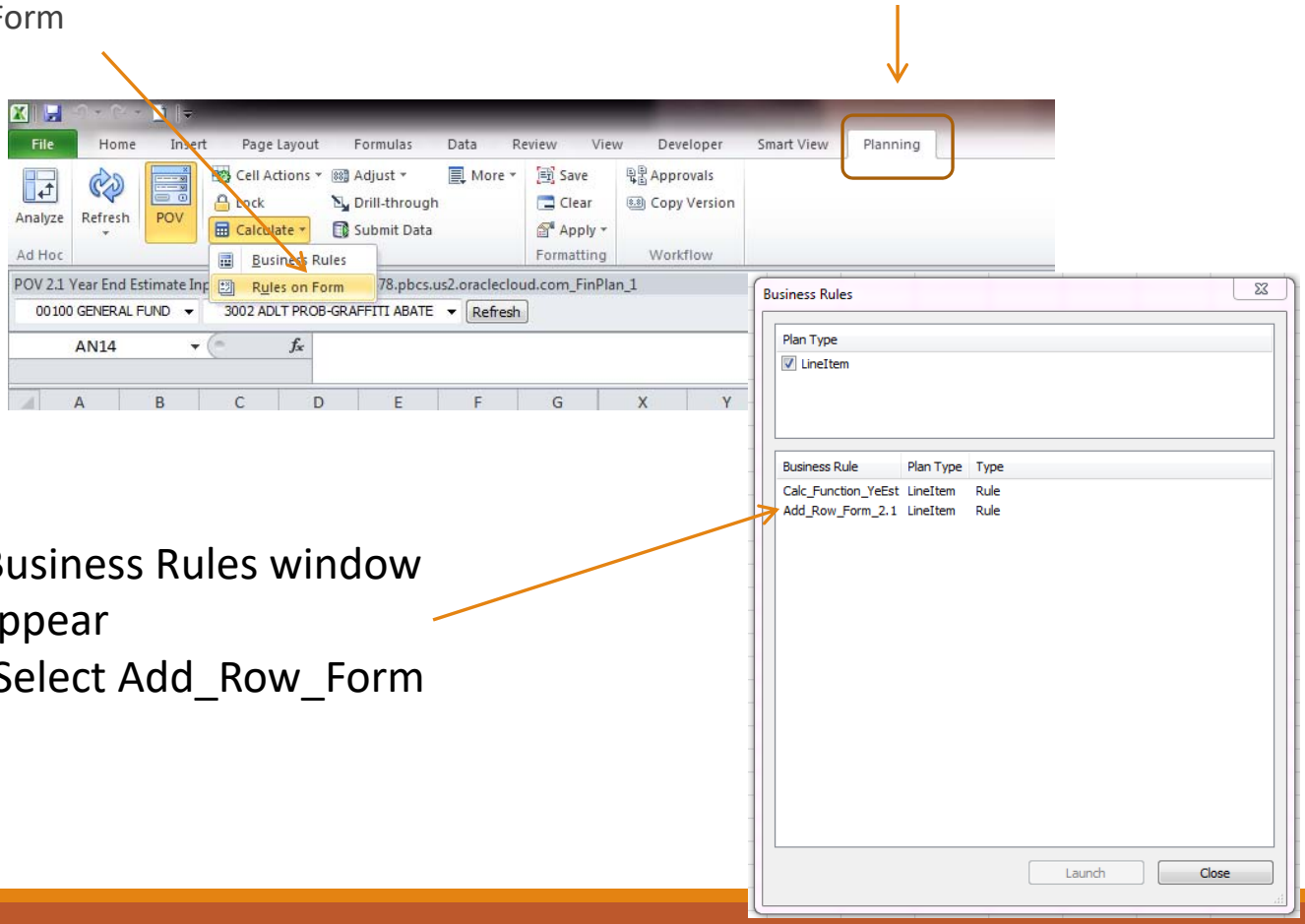
- The cells will turn back to a light yellow color once the upload is complete, the total will update and there may be a variance that is shown as well. To ensure upload was successful click on the "Refresh" button.



Smart View – Adding Accounting Lines

To add a new Object Account:

- Click on the Planning tab in the tools bar
  - Click the drop down arrow next to Calculate
    - Select Rules on Form

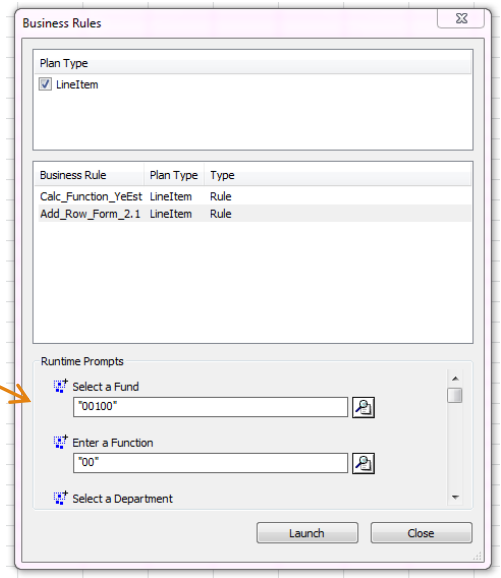


- The Business Rules window will appear
  - Select Add_Row_Form

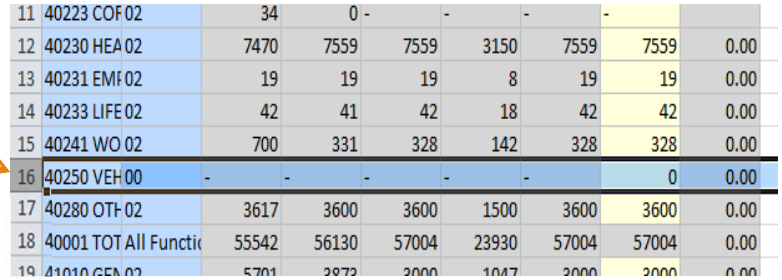
Smart View – Adding Accounting Lines

Runtime Prompts will appear below

- Input Fund, Function, Department and Object Account for the line being added.
  - Keep the “ ” (quotation) marks when inputting accounting data

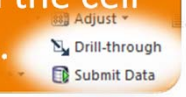


- Then, select “Launch”
  - After launch is successful, close window
  - Then select Refresh
- The new Line of Accounting will show on the form



11	40223 COF	02	34	0	-	-	-	-	
12	40230 HEA	02	7470	7559	7559	3150	7559	7559	0.00
13	40231 EMI	02	19	19	19	8	19	19	0.00
14	40233 LIFE	02	42	41	42	18	42	42	0.00
15	40241 WO	02	700	331	328	142	328	328	0.00
16	40250 VEH	00	-	-	-	-	-	0	0.00
17	40280 OTH	02	3617	3600	3600	1500	3600	3600	0.00
18	40001 TOT	All Functi	55542	56130	57004	23930	57004	57004	0.00
19	41010 GEN	02	5701	2872	2000	1047	2000	2000	0.00

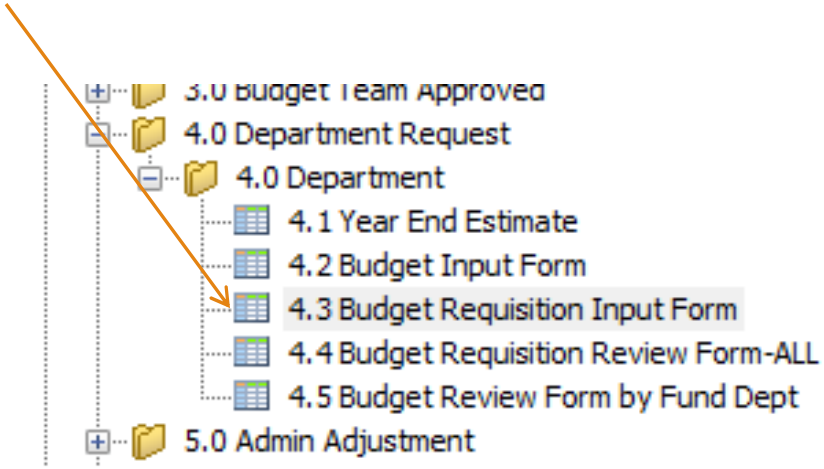
To delete a line item, delete the amount in the cell (to include 0)and click Submit Data.



Smart View – 4.3 Budget Requisition Input Form

Stage 4.0, to enter Budget Requests

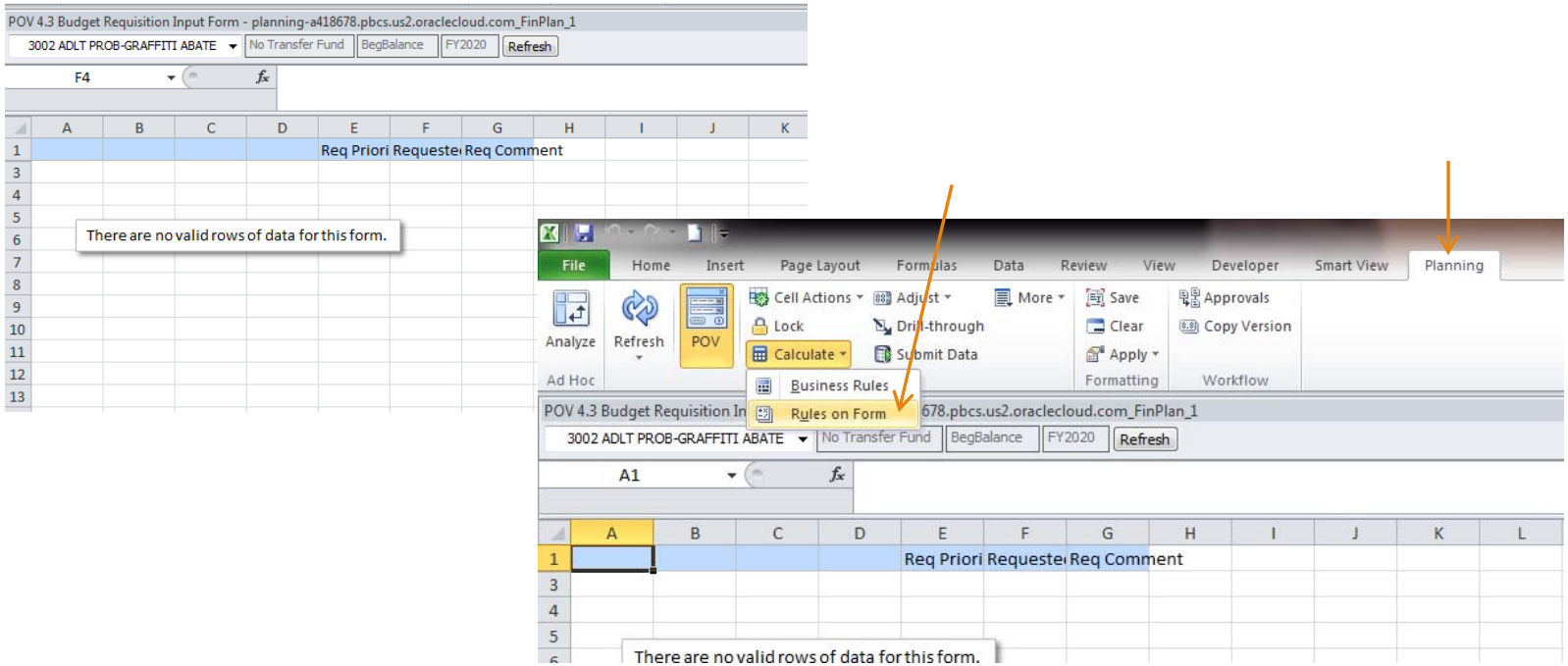
- Drill down on the side panel to form 4.3 – Budget Requisition Input Form



Smart View – 4.3 Budget Requisition Input Form

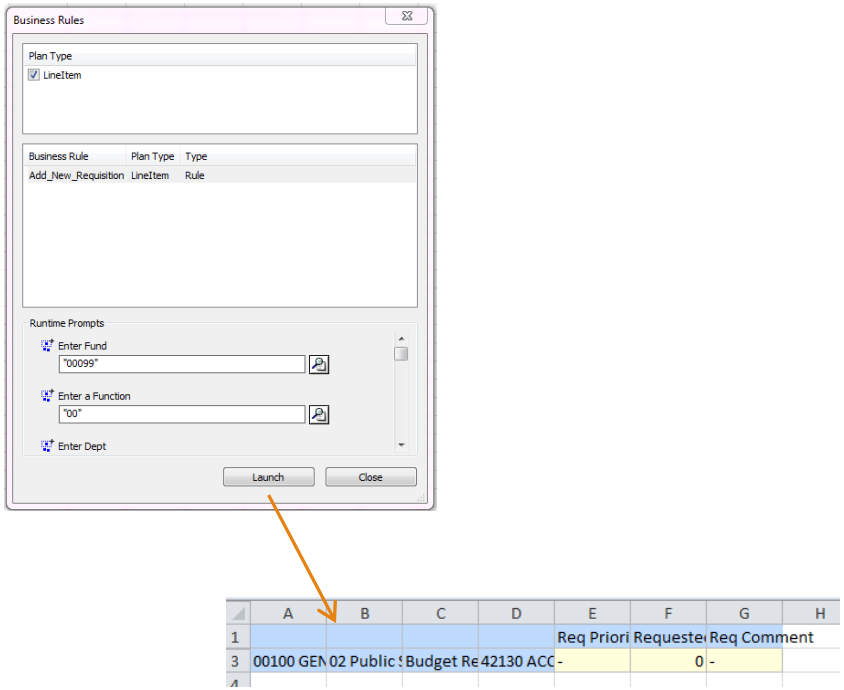
Budget Requisition Form will appear

- On the tool bar, select Planning
  - Select the drop down arrow next to Calculate
  - Then, select Rules on Form



Smart View – 4.3 Budget Requisition Input Form

- Business Rules window will open
  - Select Add_New_Requisition under Runtime Prompts
    - Input Fund, Function, Department, Accounts, Budget Request number keeping “ ” (quotation marks)
      - For Budget Request number enter .1 for one time amounts and .2 for on going amounts
    - Select Launch
      - After launch is successful, select close
  - Next, select Refresh, the new Budget Request Line will appear on the form



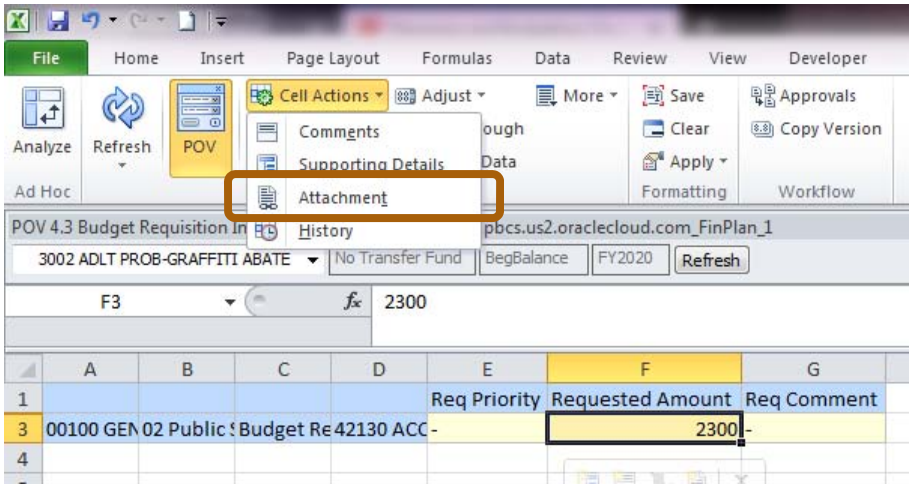
Smart View – 4.3 Budget Requisition Input Form

Once the Budget Request is showing

- Add Priority number under Req Priority
- Add Requested Amount
- Add brief description under Req Comment

To add the attachment select the cell under Requested Amount

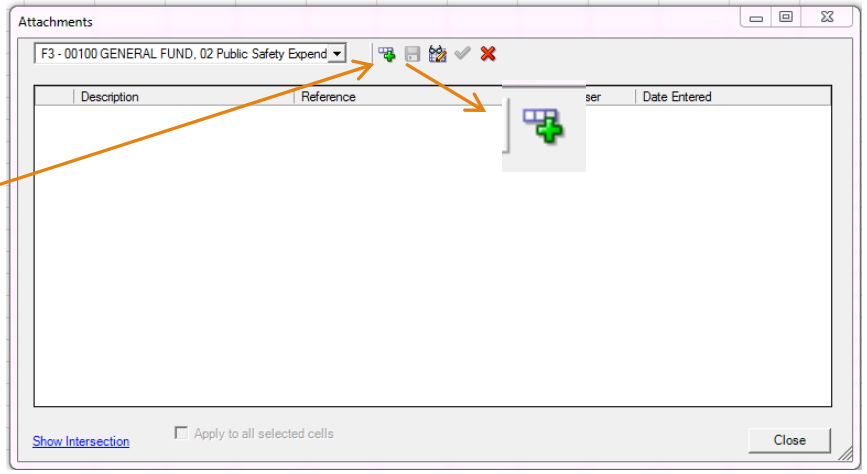
- Then in the tool menu bar, select Planning, then the drop down by Cell Actions
  - Select Attachment



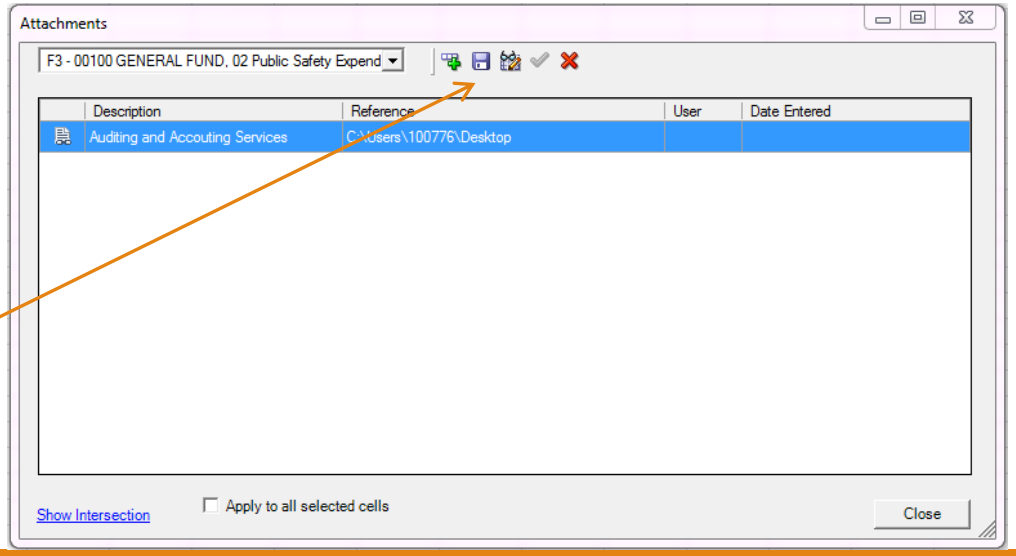
Smart View – 4.3 Budget Requisition Input Form

Attachment pop up will appear

- Select the green + sign



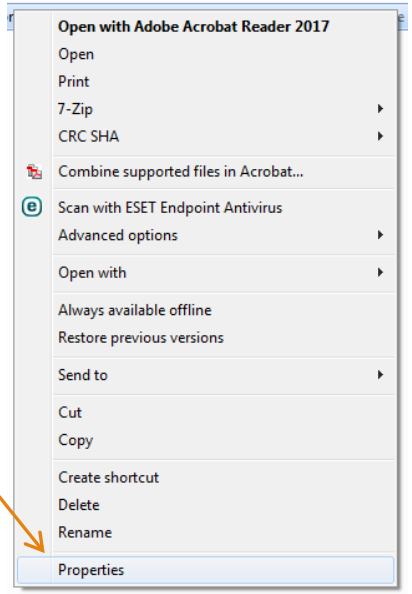
- Fill in a brief Description
- In the Reference block you will enter the file path name for the attachment
- Click the Save button, then close

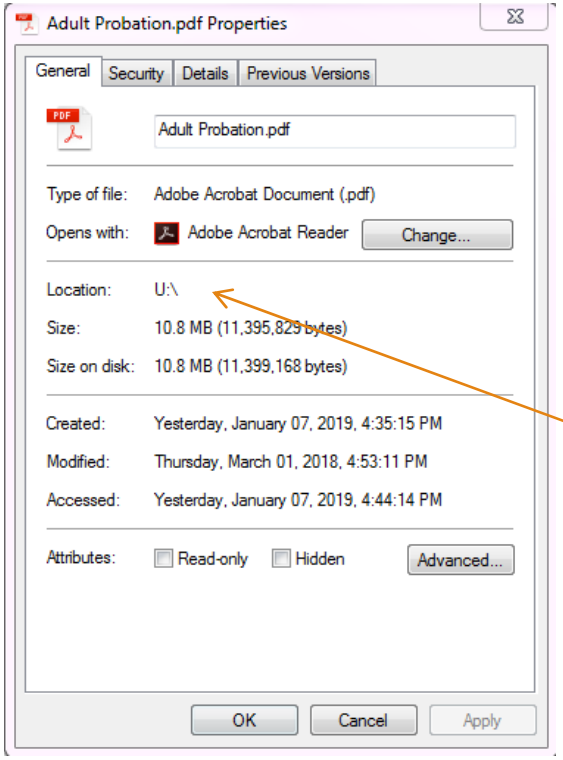


Smart View – 4.3 Budget Requisition Input Form

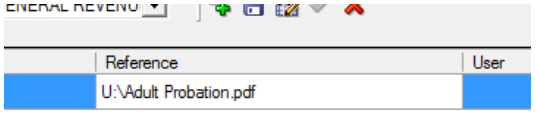
To add Reference for attachment

- Go to attachment file
  - Right click on the file and select properties



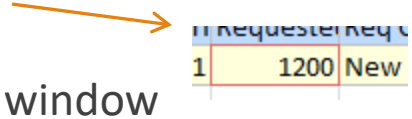


- Select General in the Properties pop up
  - Look for Location
  - Copy that information and paste it into the Reference cell of the attachment information in Smart View
    - **The document name will have to be typed in after the file location path. Possibly a backslash (\) if one is not already there.

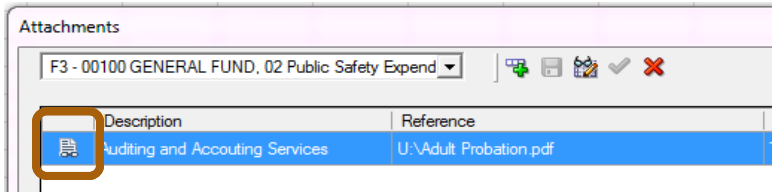


Smart View – 4.3 Budget Requisition Input Form

To verify that the attachment uploaded, there will be a red box around the Requested Amount cell



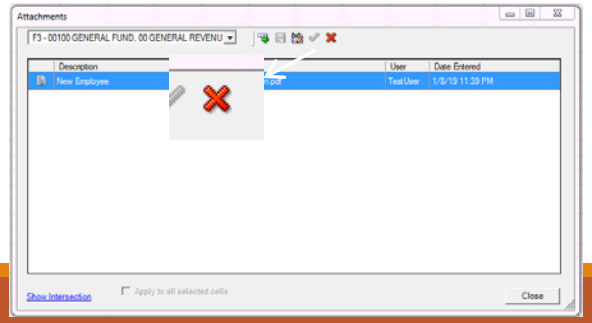
- If reference location is valid, attachment will open in a new window
- Close window and click "Submit Data" to submit Budget Request into Oracle Cloud



- Another way to ensure the request uploaded is by logging into Oracle Cloud and viewing the 4.3 – Budget Requisition Input Form
  - A small paperclip will show in the top right corner for the Requested Amount cell

				Req Priority	Requested Amount
00100 GENERAL FUND	02 Public Safety Expenditures	Budget Request 1 - One Time Amounts	42130 ACCOUNTING AND AUDITING SERVICES		2,300

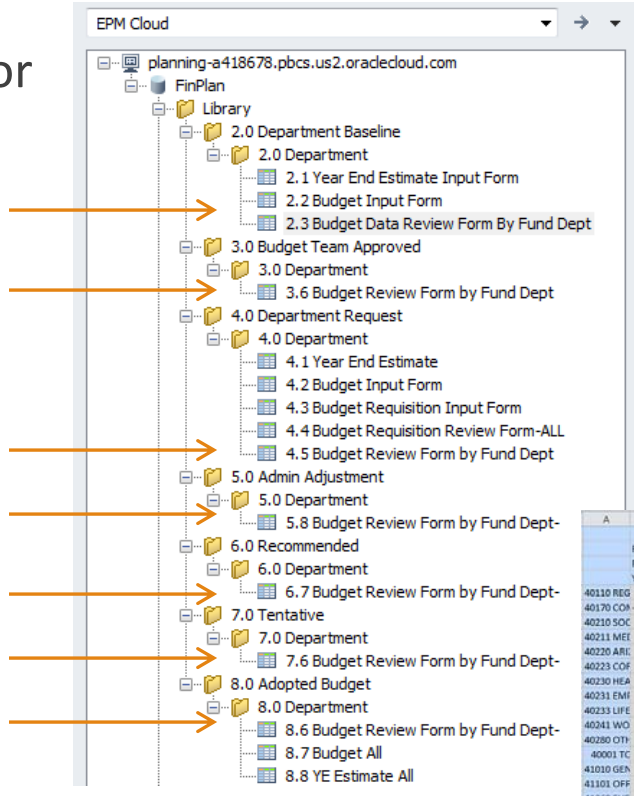
- To delete the attachment, click on the red X in the Attachments pop up window

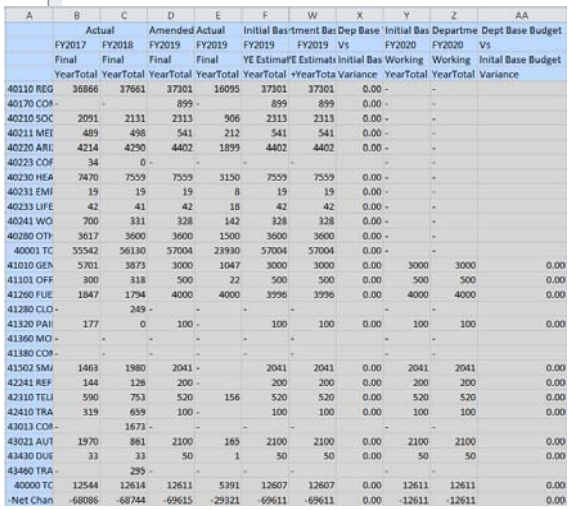


Smart View – Review Forms

Review Forms are available for each stage similar to viewing in Oracle Cloud.

- Click on the Review form
- All lines will be greyed out. Data cannot be modified in Review Forms.





Questions?