

Overview:

Smart View enables you to download the analysis (OTBI Reports) from the BI catalog and view them in Microsoft Office applications like Excel, PowerPoint and Word.

We can also create a new analysis with OTBI content and upload new analysis back to the BI catalog.

Smart View uses a Microsoft Office interface designed for Oracle Enterprise Performance Management System, Oracle Business Intelligence, and Oracle Fusion Financials products. When working with report packages in Smart View, we can:

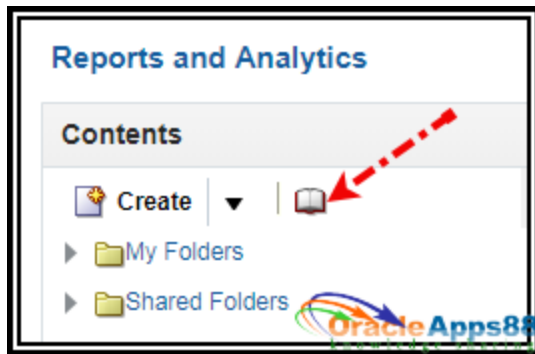
- Author doclets using familiar Microsoft Office tools to access and work with data without having to download and work on them locally.
- Complete review and sign off tasks for report packages.
- Perform complex analyses on your data.

Installing, Setting up and Working with Smart View

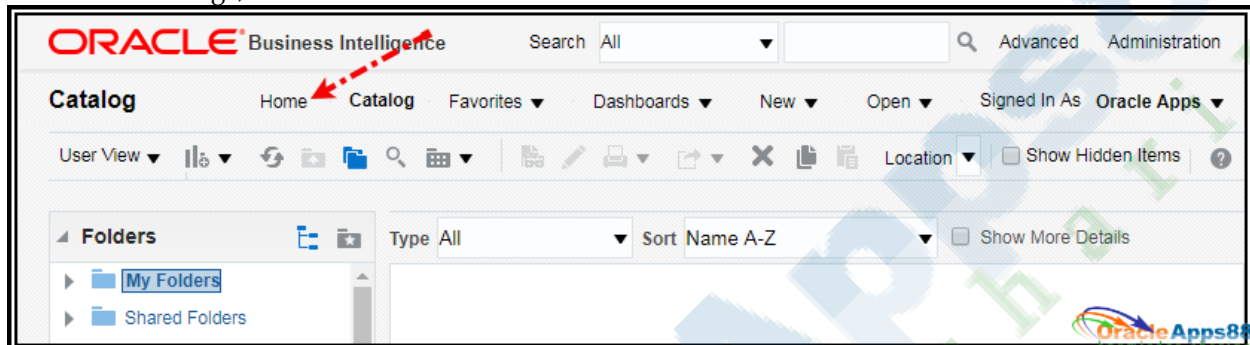
1. (N) Navigator > Tools > Reports and Analytics



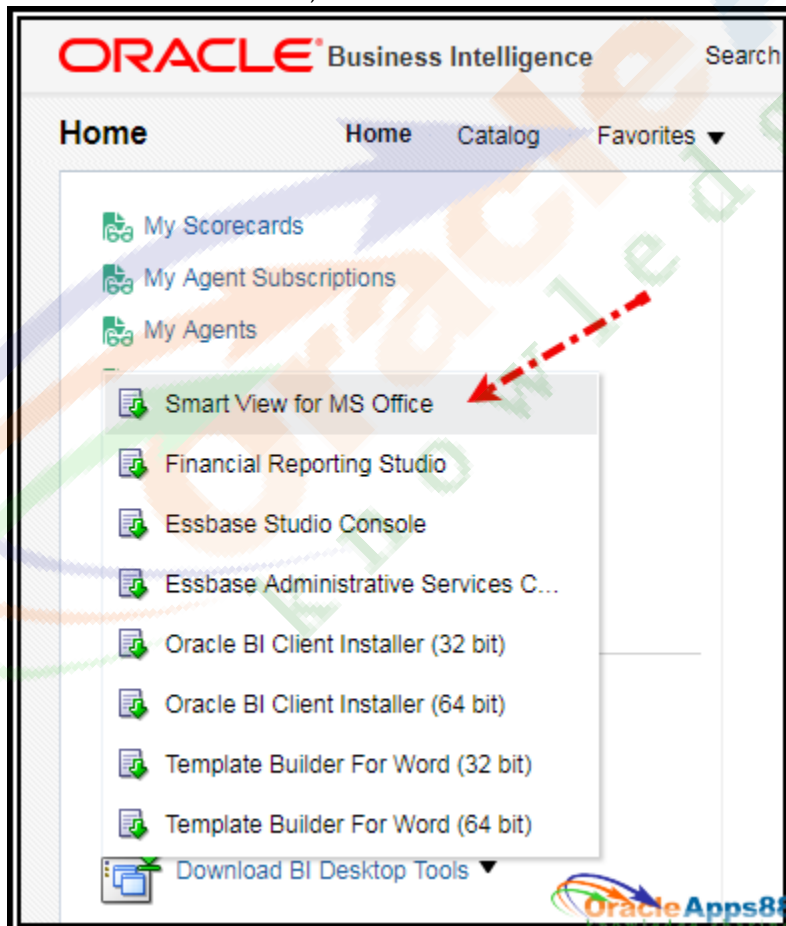
2. Click on Browse Catalog icon



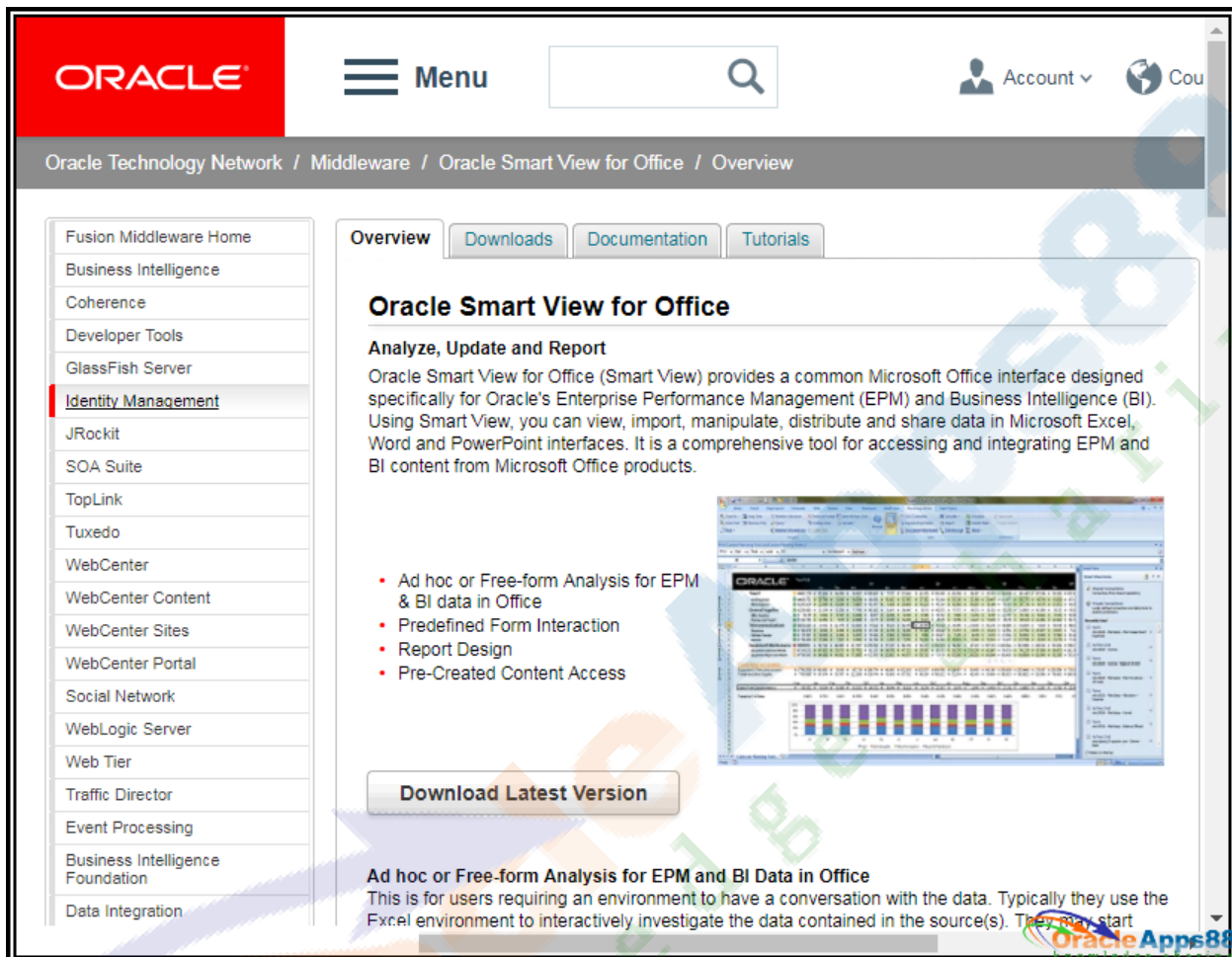
3. On BI Answer Page, Click on Home



4. Under Get Started section, select "Smart View for MS Office" from "Download BI Desktop Tools" list



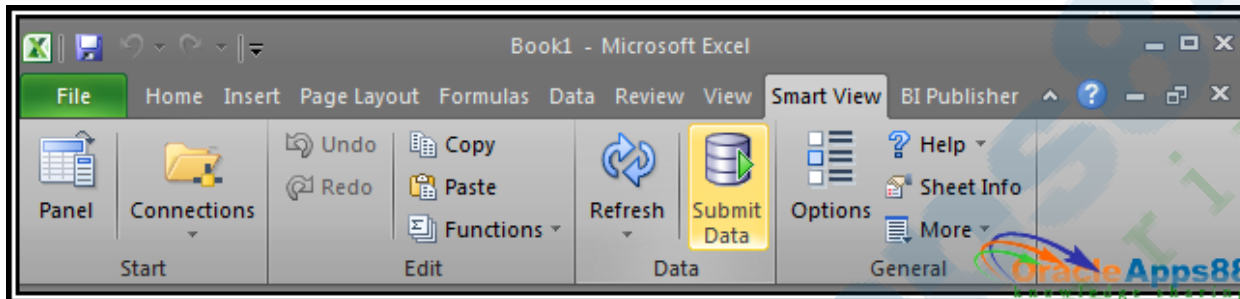
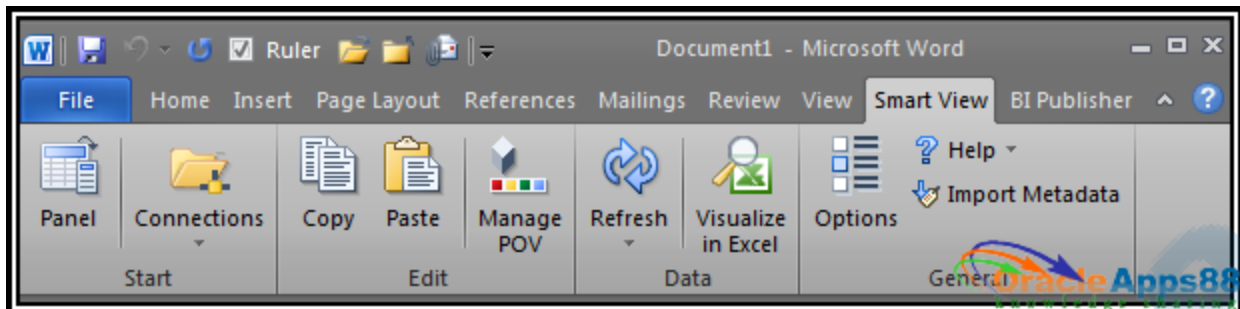
5. Below url page will open from where Latest Version of Smart View can be downloaded
<http://www.oracle.com/technetwork/middleware/smart-view-for-office/overview/index.html>



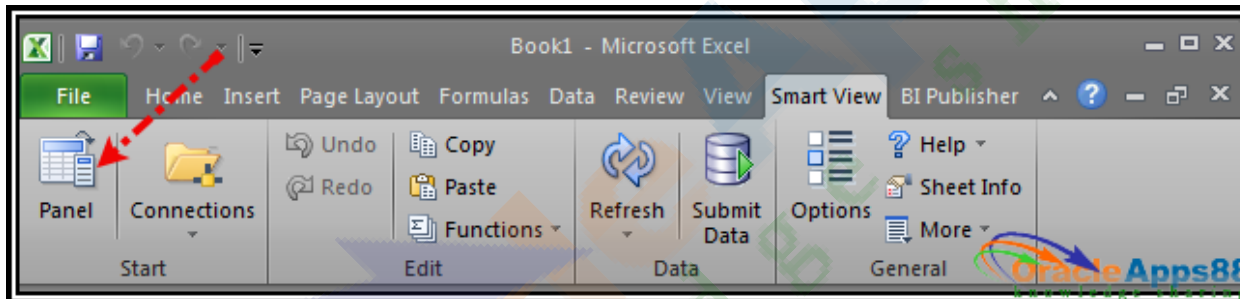
6. Save the zip file at local drive, unzip it and install Smart View while using SmartView application from unzipped folder

Name	Date modified	Type	Size
smart_view_11125720_readme.html	11/30/2017 6:04 AM	Chrome HTM...	155 KB
SmartView.exe	11/30/2017 10:20 AM	Application	131,242 KB
version.xml	11/30/2017 10:20 AM	XML File	1 KB

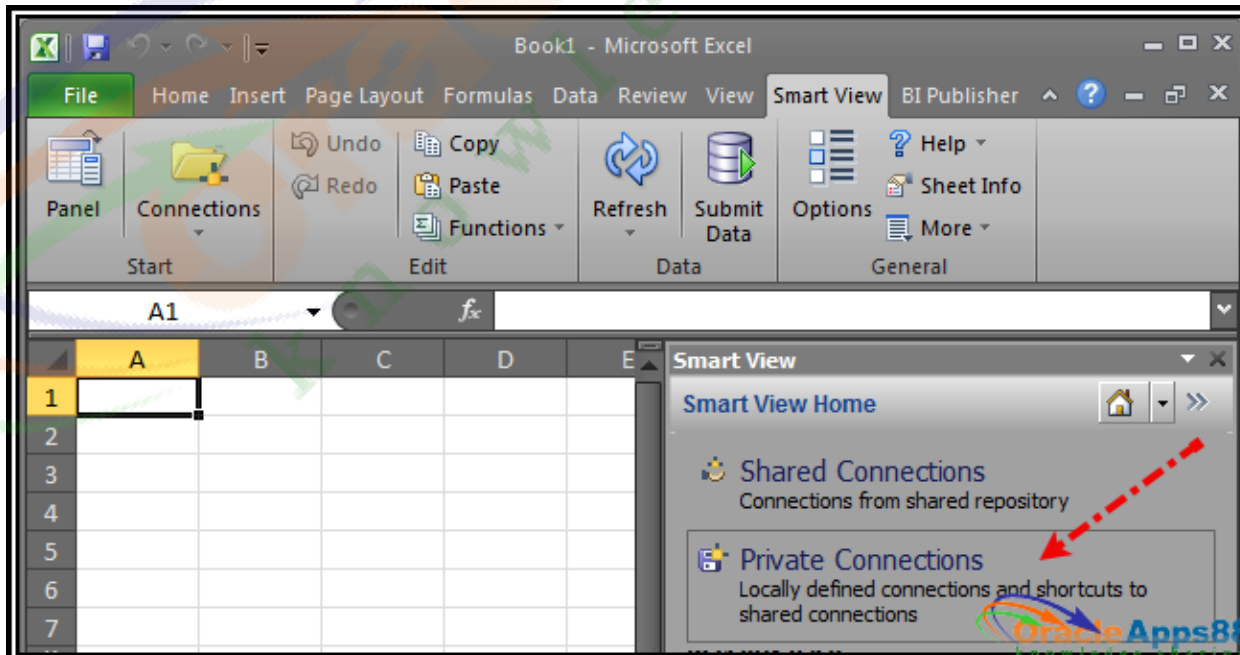
7. Once Smart View is installed, next time when MS Excel, MS Word or PowerPoint opens, there will be added menu "Smart View"



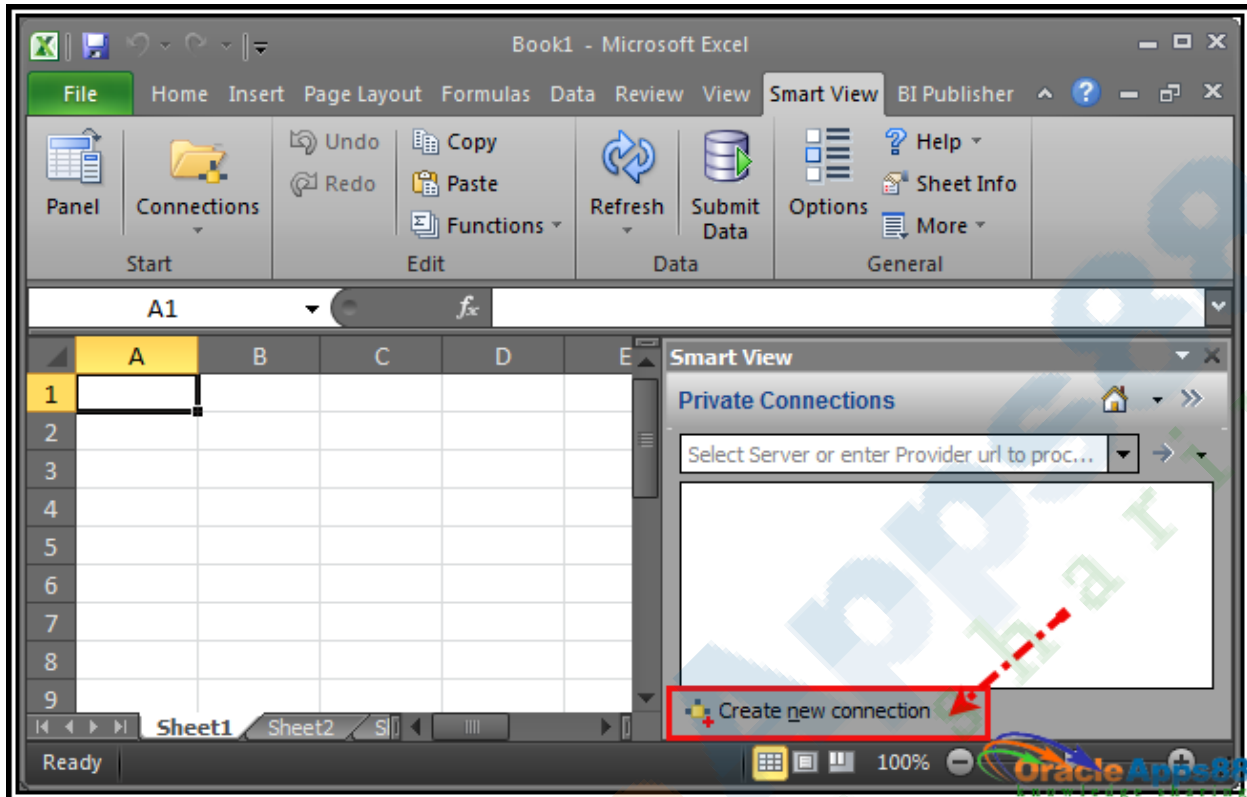
8. Select Smart View from Menu and click on **Panel**



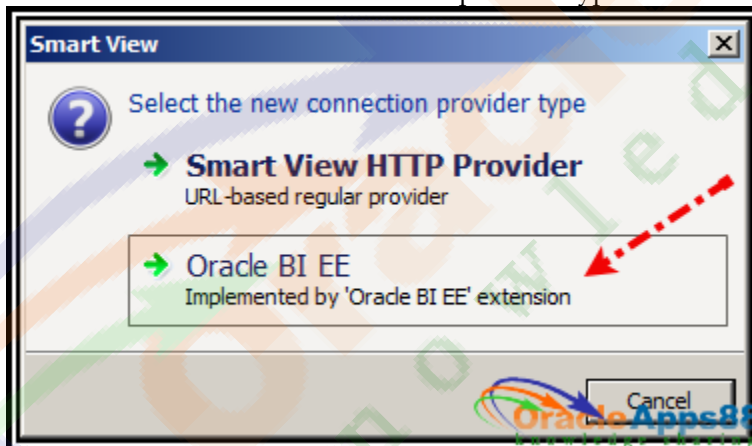
9. Select **Private Connections**

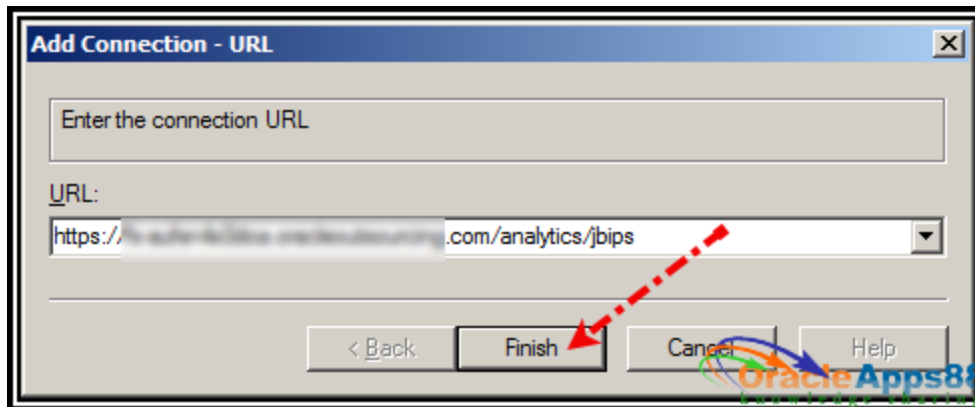


10. Click on Create New Connection

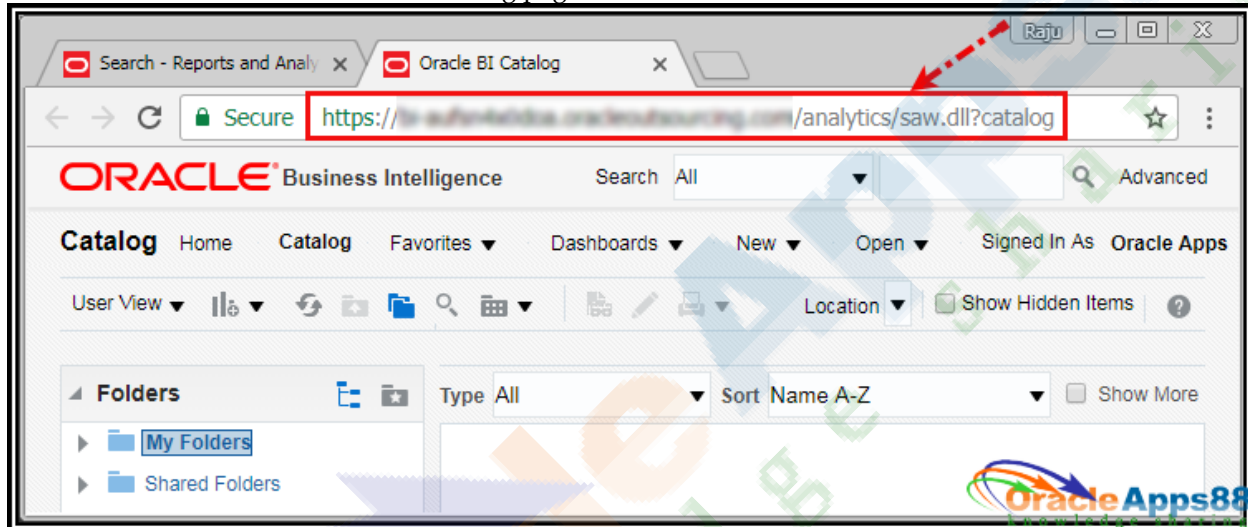


11. Select Oracle BI EE as new connection provider type

12. Provide the URL as `http(s)://<ServerName>/analytics/jbips`

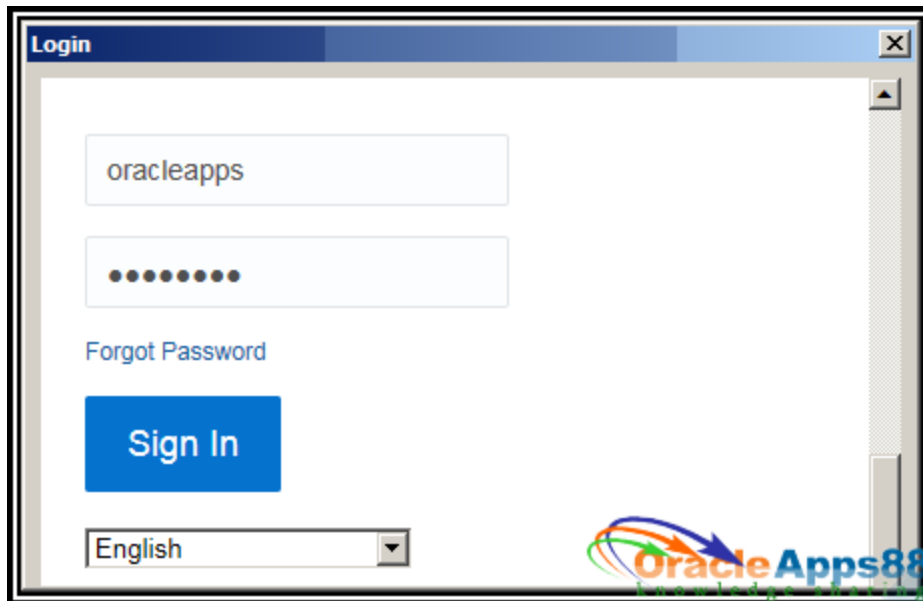


13. We can use the URL from Oracle BI catalog page

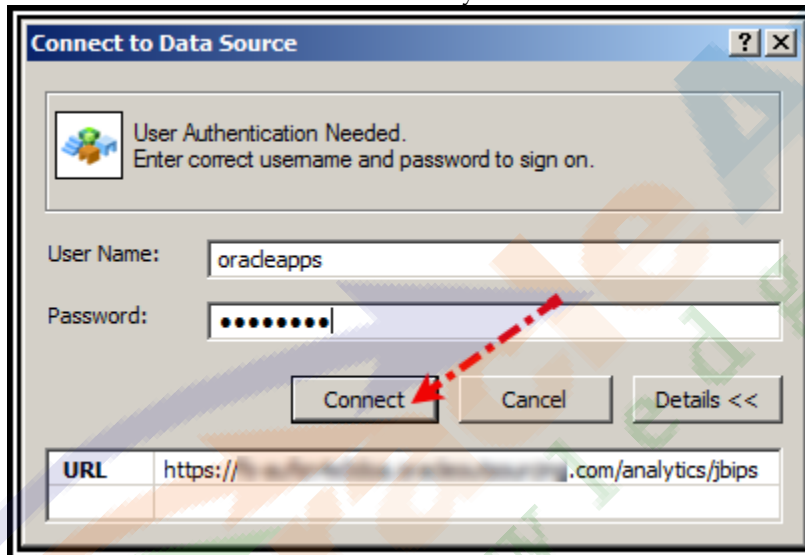


14. Here replace the text after analytics/ with jbips
https://<ServerName>/analytics/saw.dll?catalog -- Replace saw.dll?catalog
https://<ServerName>/analytics/jbips -- with jbips

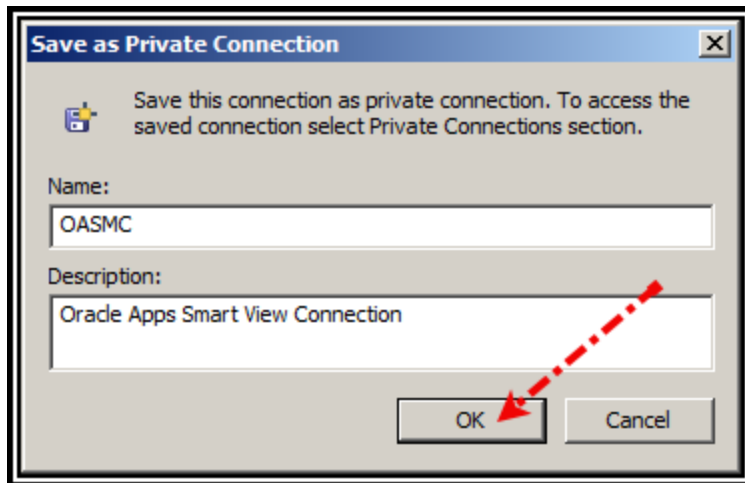
15. Login with your Fusion user credentials



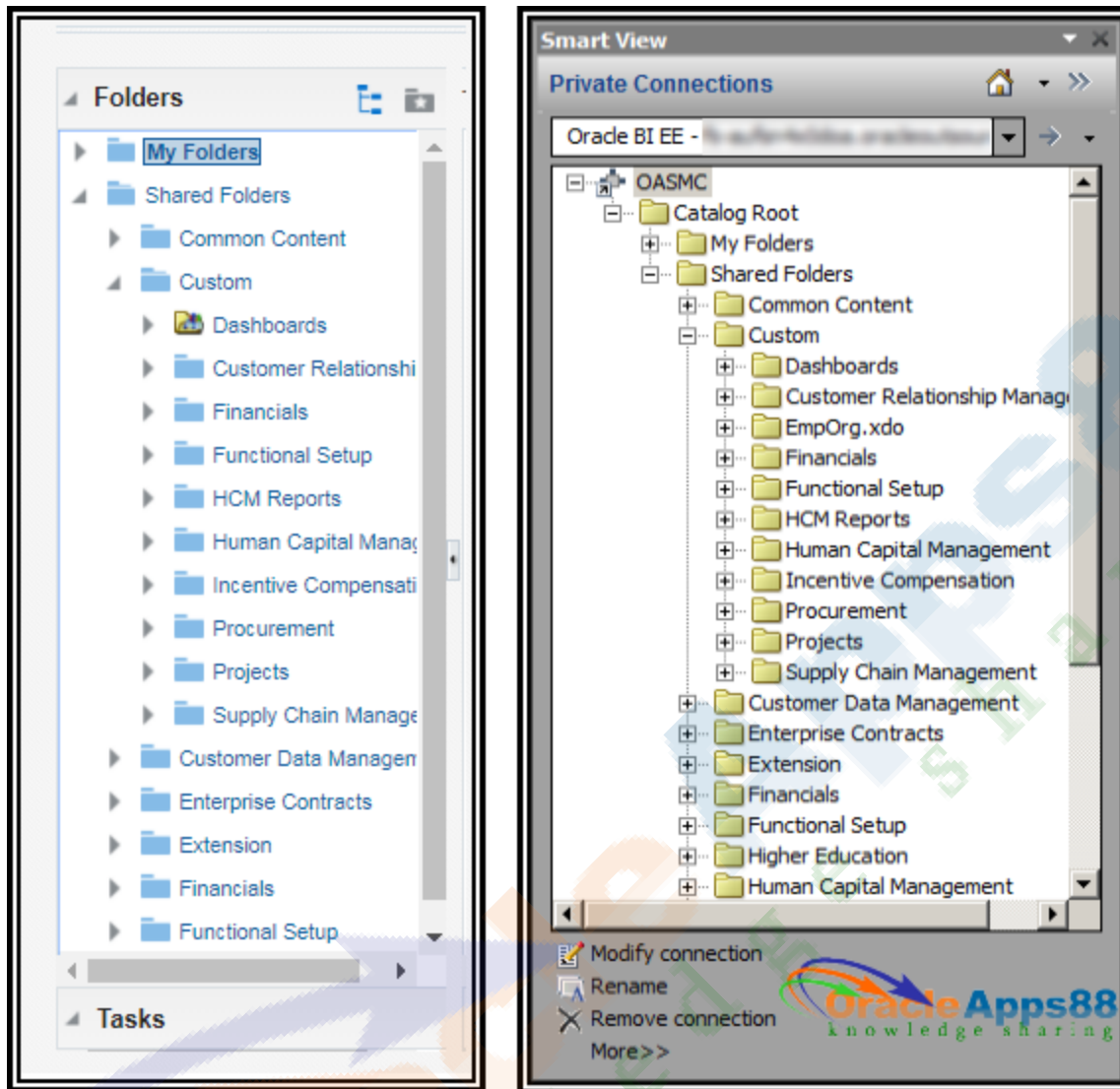
16. And then connect to Data Source with your Fusion user credentials



17. Give your desired name of your private connection



18. Once Connection created and connected, we can see the same folder structure is visible in Excel as in BI Catalog page in Fusion

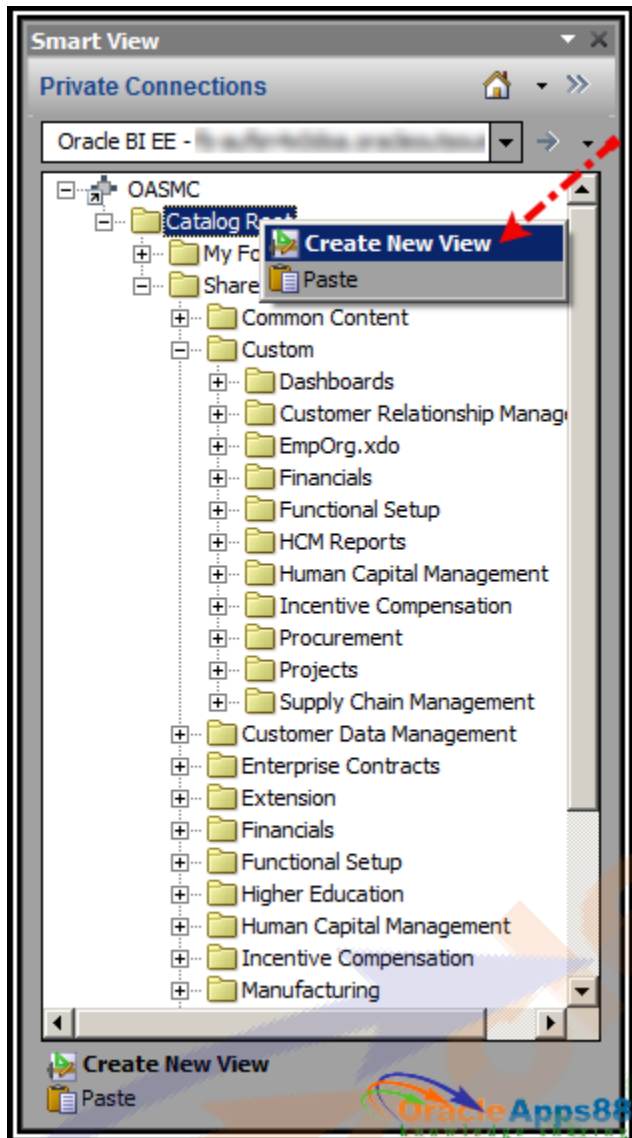


Fusion BI Catalog

Smart View Catalog

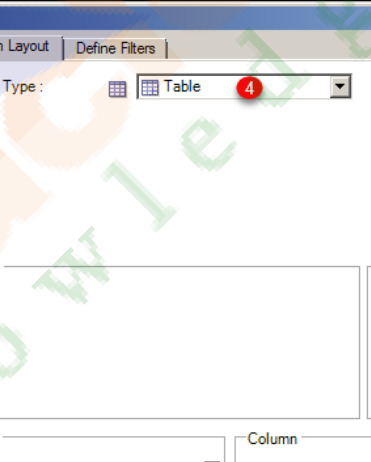
Now we are ready to work with Smart View

19. Right click on 'Catalog Root' and select 'Create New View'



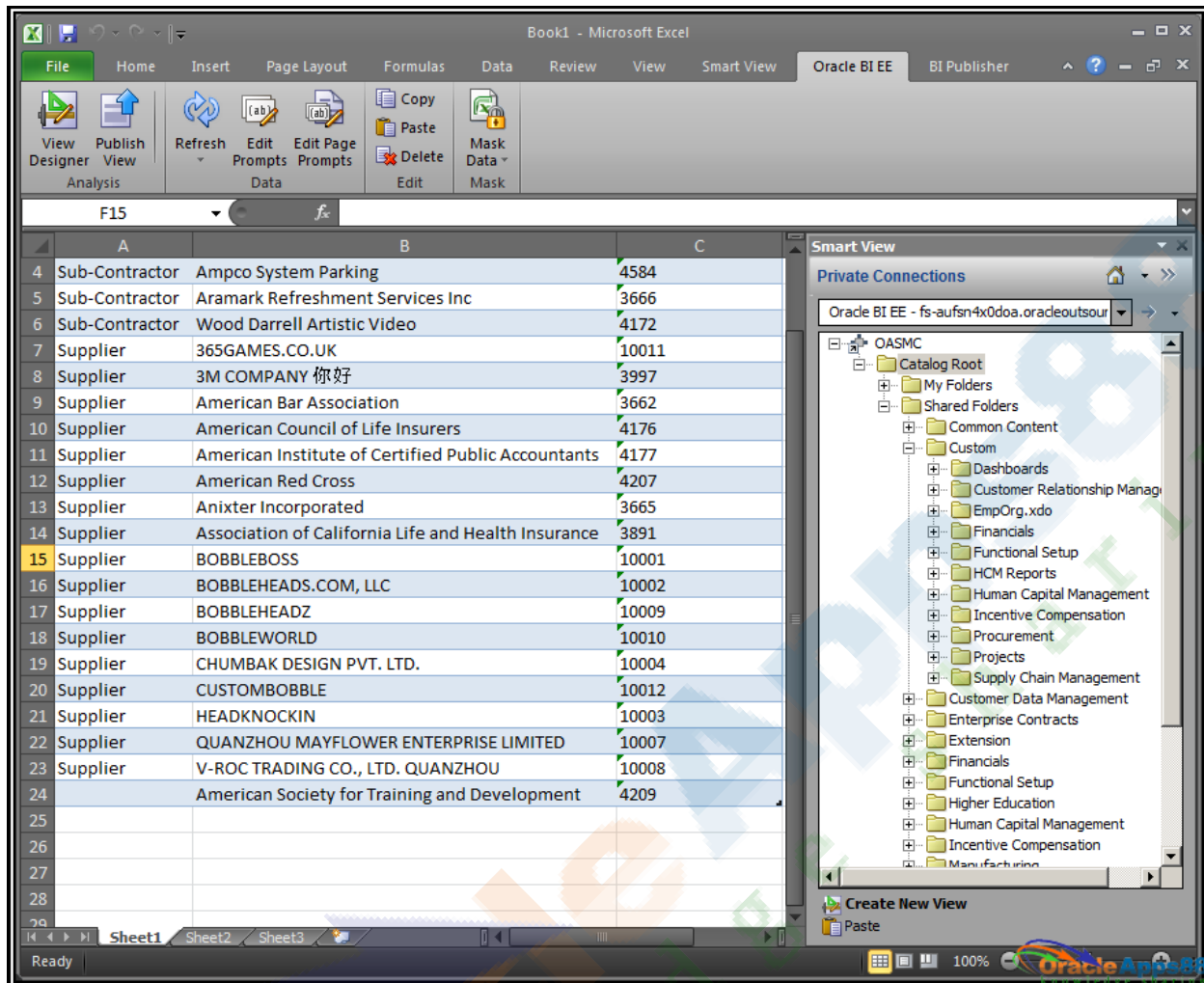
20. It opens the View Designer Window where Subject Areas are available in left side and designer window in right side



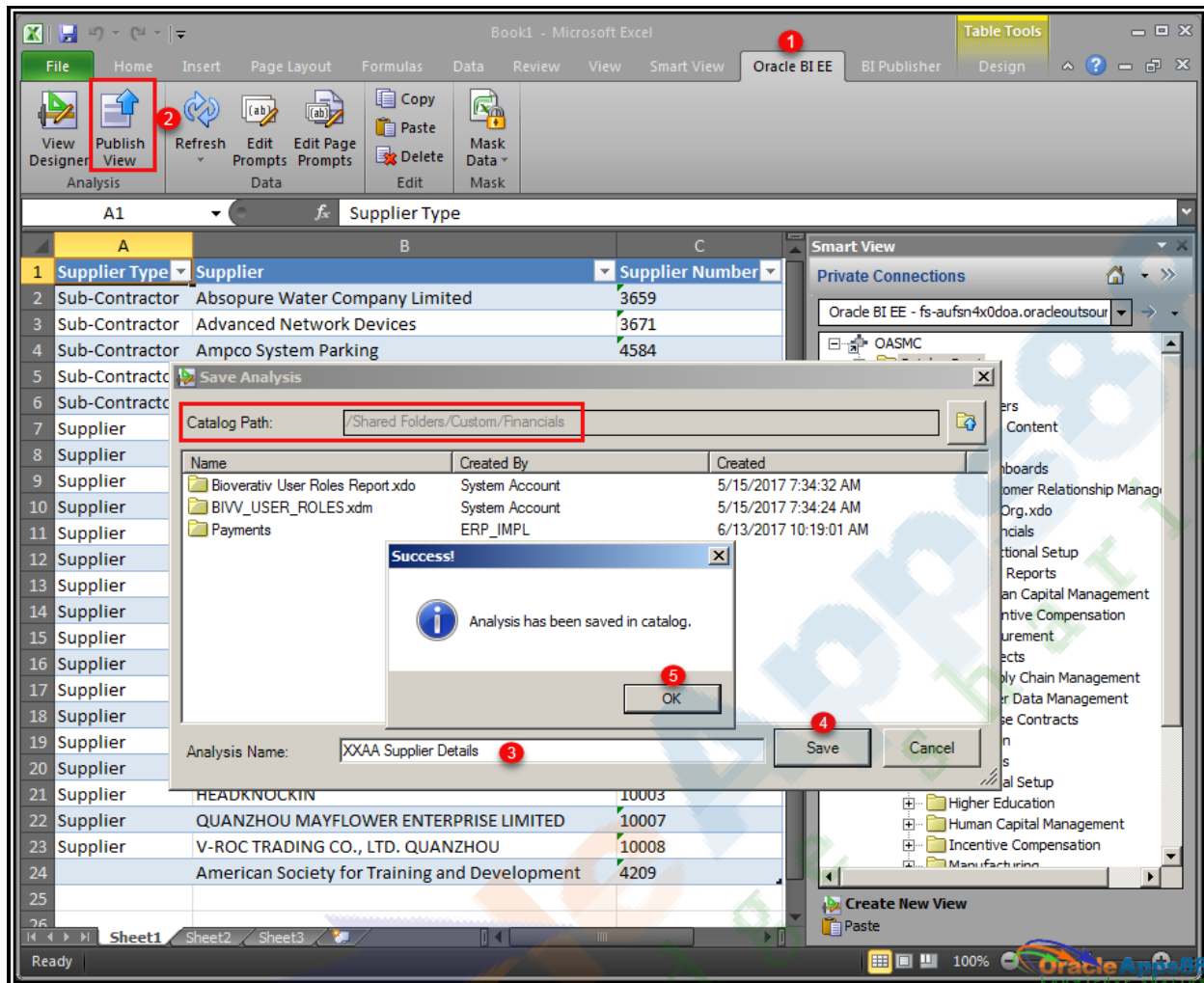
- analysis through Smart View, select Payable columns from folders to designing window
- 
- The screenshot shows the 'Designing' window in Smart View. The 'View Type' dropdown is set to 'Table', which is highlighted with a red circle and the number 4. The 'Page' and 'Section' areas are empty. The 'Row' section shows 'Row Grand Total' with an unchecked checkbox. The 'Column' section shows a button labeled 'Supplier Type'.



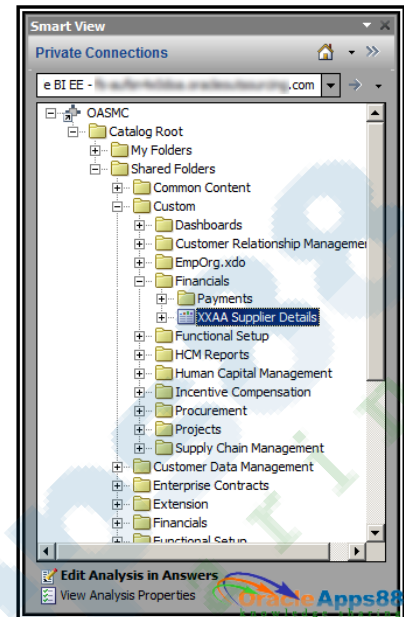
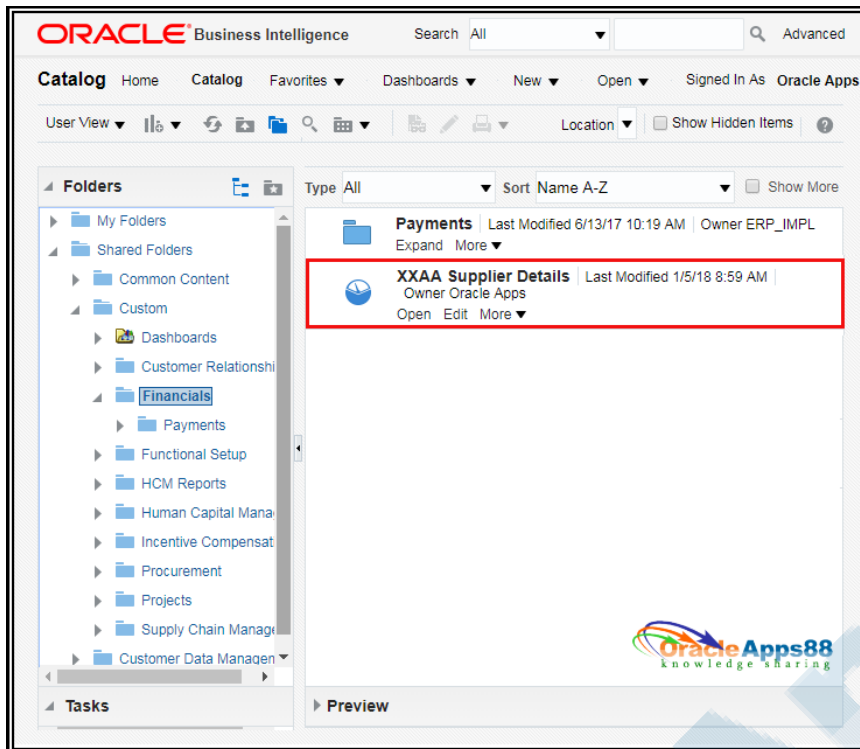
22. It created the Analysis in Excel



23. To move it to BI Catalog, select Publish View under ORACLE BI EE menu and select your folder under which want to save the Analysis.



24. Once Analysis is saved to catalog, we can see the Analysis in Fusion as well.



25. Click on Open

The screenshot shows the Oracle Business Intelligence Catalog interface with the 'XXAA Supplier Details' report open. The report is displayed as a table with three columns: 'Supplier Type', 'Supplier', and 'Supplier Number'. The table contains 14 rows of data, including 'Sub-Contractor' and 'Supplier' types. The 'XXAA Supplier Details' report is highlighted in the top navigation bar.

Supplier Type	Supplier	Supplier Number
Sub-Contractor	Absopure Water Company Limited	3659
	Advanced Network Devices	3671
	Ampco System Parking	4584
	Aramark Refreshment Services Inc	3666
	Wood Darrell Artistic Video	4172
Supplier	365GAMES.CO.UK	10011
	3M COMPANY 你好	3997
	American Bar Association	3662
	American Council of Life Insurers	4176
	American Institute of Certified Public Accountants	4177
	American Red Cross	4207
	Anixter Incorporated	

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