UPlan Smart View User Manual

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Fall 2014

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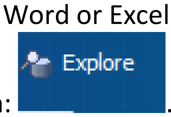
Introduction and Background to Oracle Smart View

UPlan is the UCSF customized instance of **Oracle Enterprise Performance Management (EPM)**, a budgeting and forecasting application suite that includes **Oracle Hyperion Planning**. Hyperion Planning sits on top of an application called **Essbase**, which is a multidimensional database management system (MDBMS) that provides a multidimensional database platform upon which to build analytic applications. Essbase, whose name derives from "Extended Spread Sheet dataBASE", began as a product of Arbor Software, which merged with Hyperion Software in 1998. **Smart View for Office (Smart View)** is an Oracle product that comes with the EPM suite that works with Hyperion Planning and Essbase to allow users to view, import, manipulate, distribute and share data in Microsoft Excel, Word and PowerPoint interfaces.

Smart View allows for ad hoc reporting from the Hyperion Planning system and also provides an alternative to the web-based forms by using a common MS Office interface.

Using Smart View with UPlan

This training manual will describe how to use the **Oracle Hyperion Planning, Fusion Edition**. This is the Smart View tool for data input into pre-existing forms and reports. There is a separate manual for Essbase (used for ad hoc reporting). Reporting & Analysis Framework is used to import pre-created content such as Financial Reports (FR) into PowerPoint, Word or Excel). (FR reports are located in Hyperion Planning Web interface via the Explore button: 

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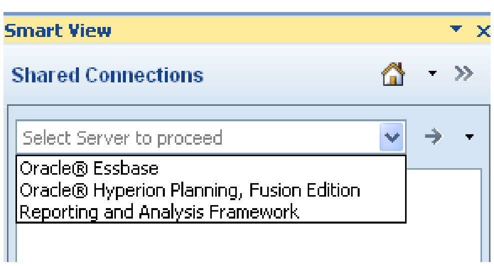
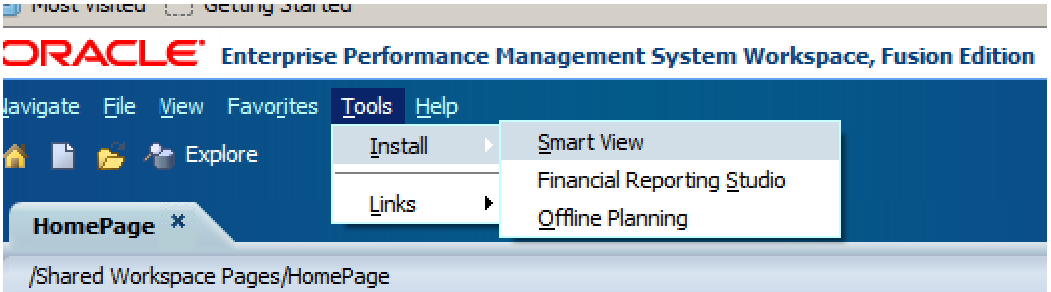


During the initial rollout of Smart View Planning with Forms during Fall 2014, access will only be provided for General Planning and Commitment Tracking forms and reports. The Employee Planning Forms should be available in Smart View in Winter 2015.

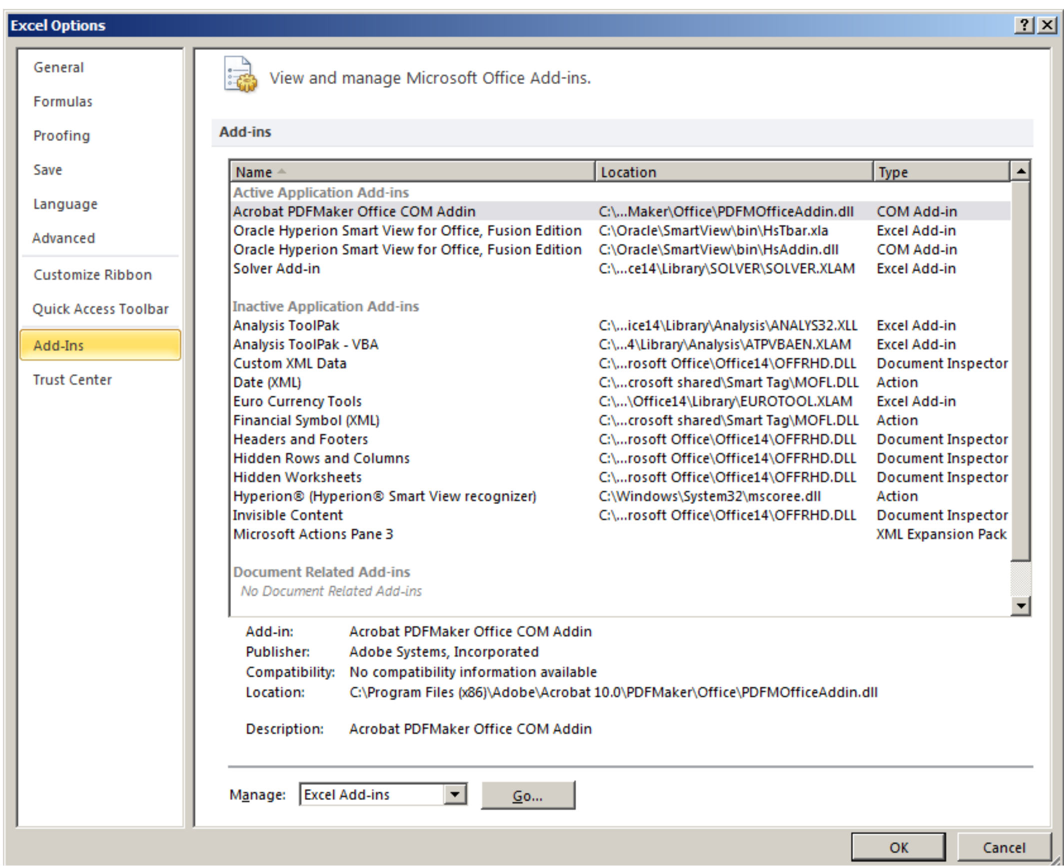
Getting Started

How to Download the Smart View Excel Add-in

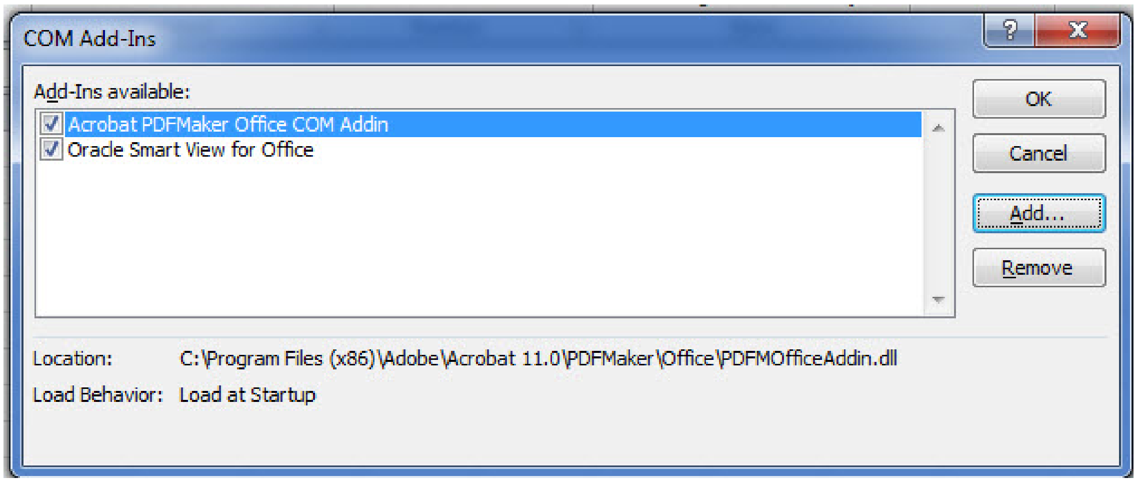
1. Log in to UPlan through MyAccess. Once logged in, go to Tools > Install > Smart View.



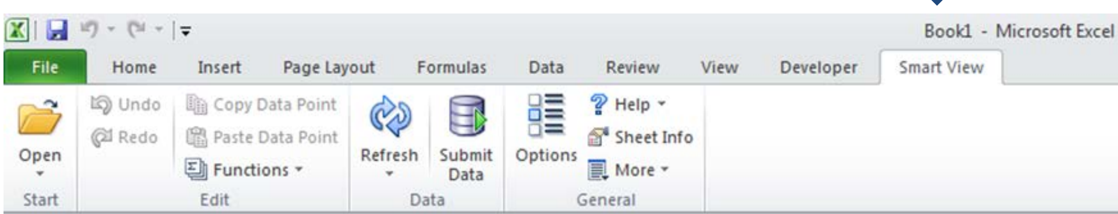
2. Click “Run” in the dialog box that appears.
3. Complete the Installation Wizard process.
4. Open Excel.
5. From the File tab, select Options > Add-Ins.
6. You should see the Oracle Hyperion Smart View add-ins (there should be two) in the Inactive Application Add-ins section.
    a. If you do not see the add-ins here, then go to the drop down menu at the bottom of the dialog box and select “Disabled Items.” Click Go. You should see the Oracle add-ins in the dialog box that appears now.
    b. Wherever you find the Oracle Hyperion add-ins, click to highlight the line item and select OK. (Twice for both Hyperion add-ins).



i. If you still do not see the add-ins, go back to the drop down menu at the bottom of the dial box and select "COM Add-ins". Click Go. Make sure the Add-ins are checked. Click Ok.



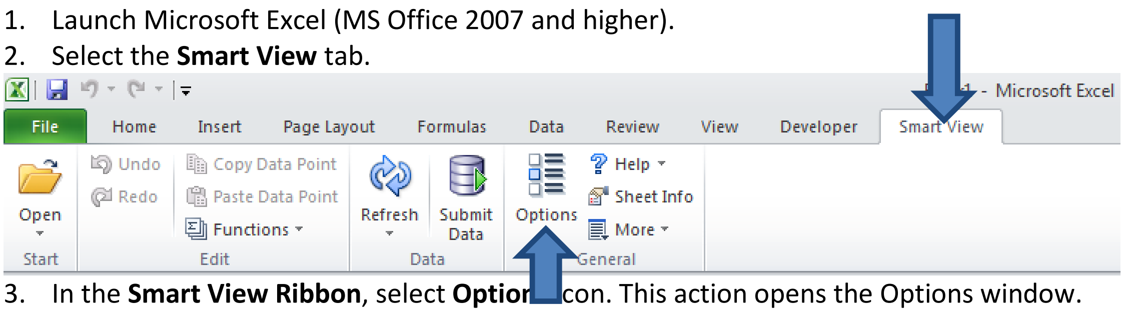
7. You should now see a new tab at the top of your Excel workbook titled "Smart View".
8. Select the tab to launch Smart View. If the Smart View tab ever disappears see the Troubleshooting section to bring it back on page 24.



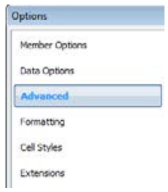
How to Launch Smart View

To Log On to Smart View:

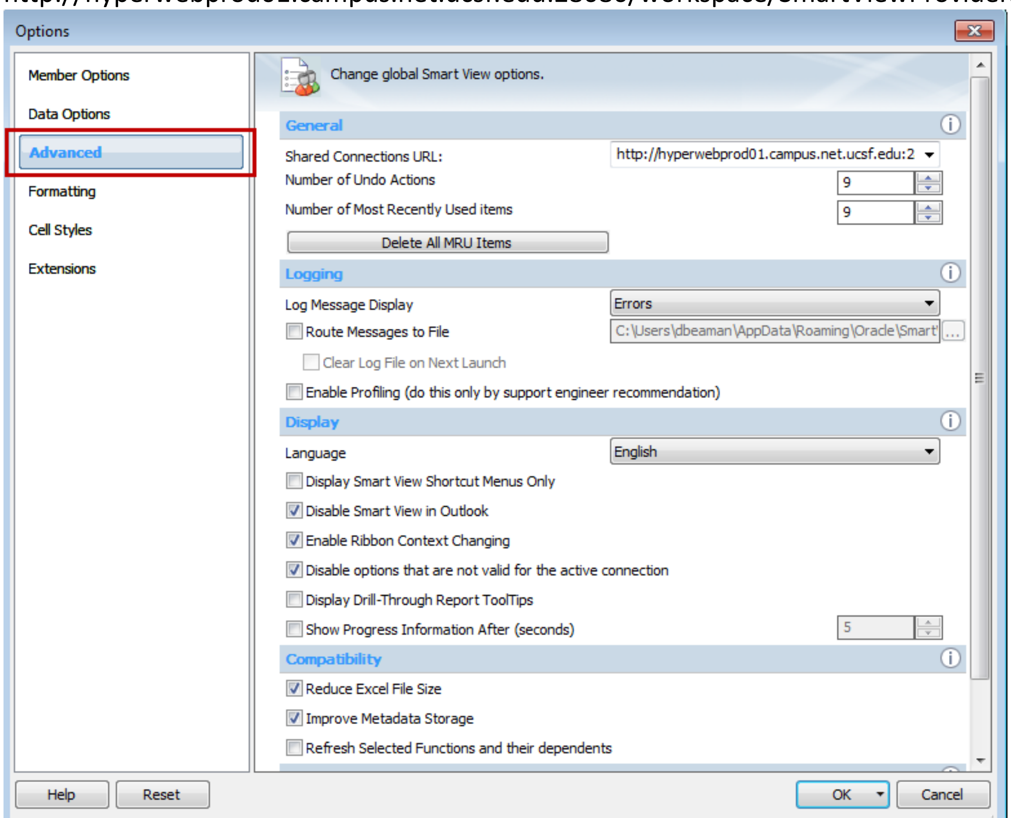
1. Launch Microsoft Excel (MS Office 2007 and higher).
2. Select the **Smart View** tab.



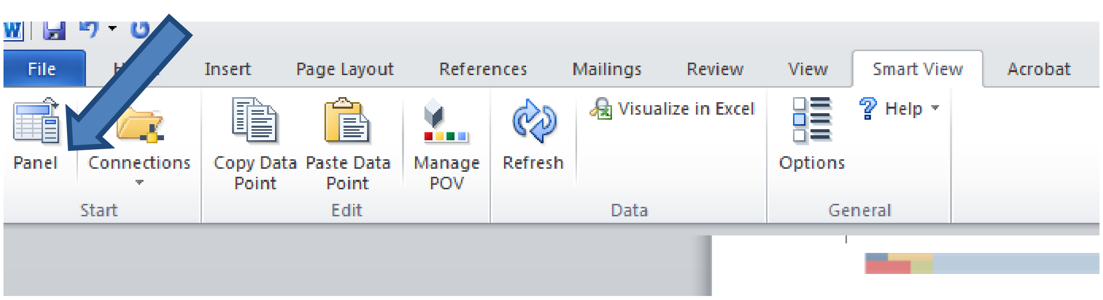
3. In the **Smart View Ribbon**, select **Option** icon. This action opens the Options window.
4. Within the Options window, select **Advanced** in the left pane. This action opens the Advanced tab of the Options window.



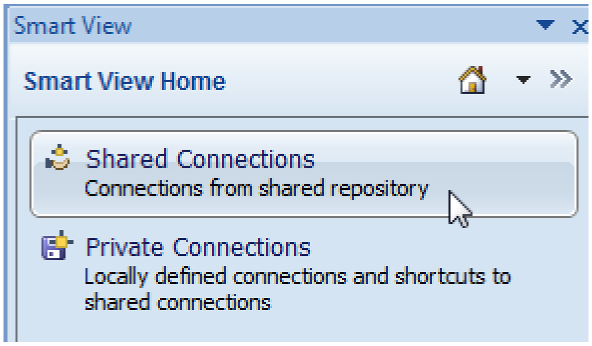
5. In the General section, under **Shared Connections URL**, input the following URL: http://hyperwebprod01.campus.net.ucsf.edu:28080/workspace/SmartViewProviders



6. Click **OK**. This action saves the Shared Connection edit.
7. In the Smart View ribbon, navigate to Panel**.** This opens the Smart View Panel.

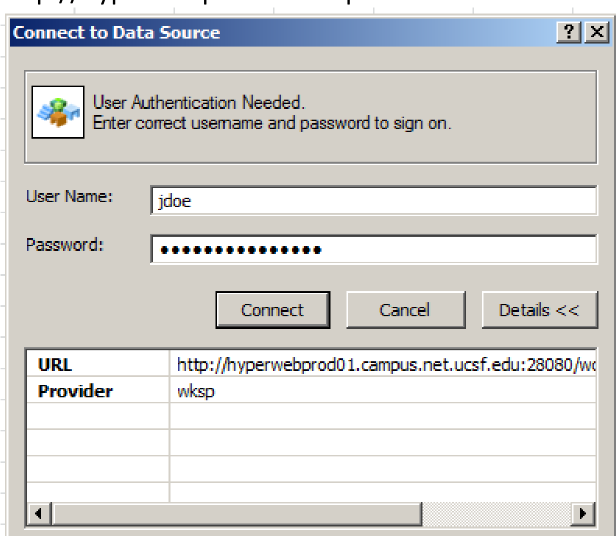


8. In the Smart View pane, click on **Shared Connections**. This action prompts the Shared Connections log-in pop-up window to appear.

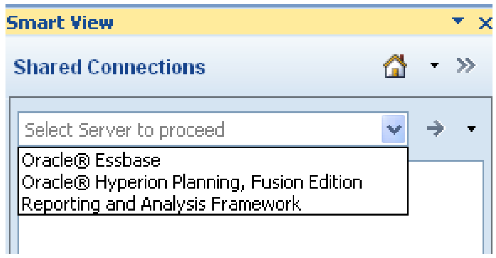


- **Shared Connections** are available connections from a shared repository where business users can connect to group connections. This connection is used the majority of the time to leverage Planning templates and Workspace content.
- **Private Connections** help to locally define connections and shortcuts.
- The Home icon lets you navigate between Shared Connections and Private Connections.

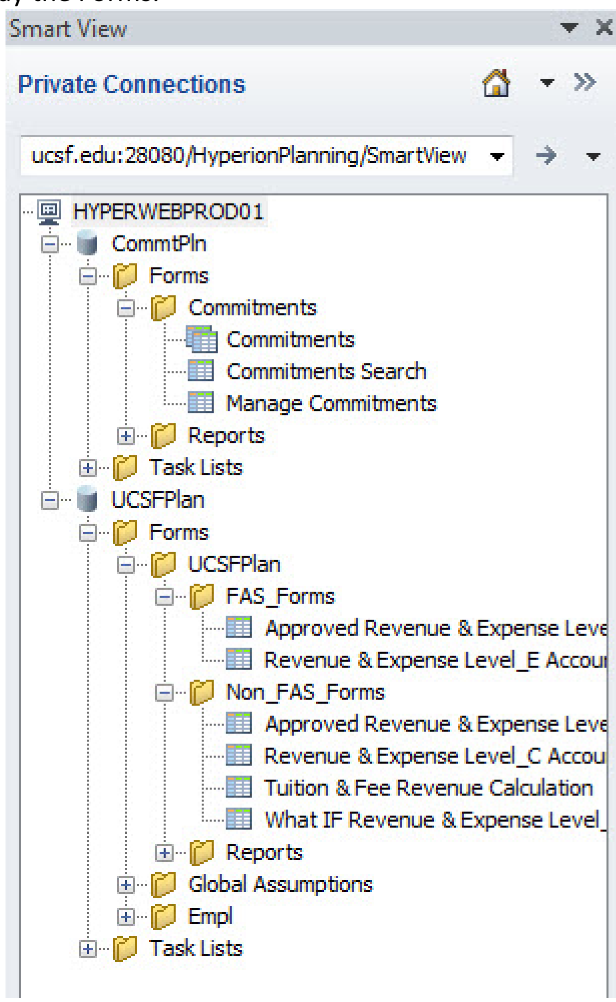
9. Enter your **UPlan User Name and Password**. Note that this is probably the same as your **UCSF Active Directory (AD) ID** and **password**. Click **Connect** in the dialog box. This action activates the connection to UPlan via Smart View. Ensure you are connecting to the correct URL:
http://hyperwebprod01.campus.net.ucsf.edu:28080/workspace/SmartViewProviders



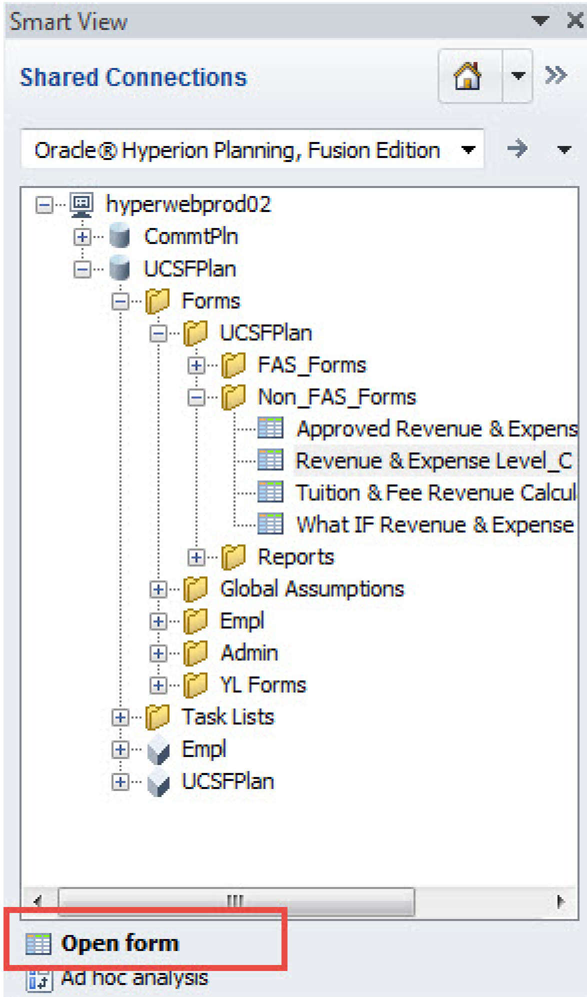
10. Once the connection is active, click the "Select Server to proceed" drop down window and select the appropriate Hyperion tool:
    - **Oracle Essbase** allows ad-hoc analysis
    - **Oracle Hyperion Planning, Fusion Edition** allows data entry form templates
    - **Reporting and Analysis Framework** provides access to formatted reports from Financial Reporting **[not currently using]**



11. Select the Oracle Hyperion Planning, Fusion Edition option.
12. Click on the + sign to Expand the HYPERWEBPROD01 or HYPERWEBPROD02 Server. Expand the CmmtPln and USFPlan applications. Expand the Forms folders within these applications to display the Forms.



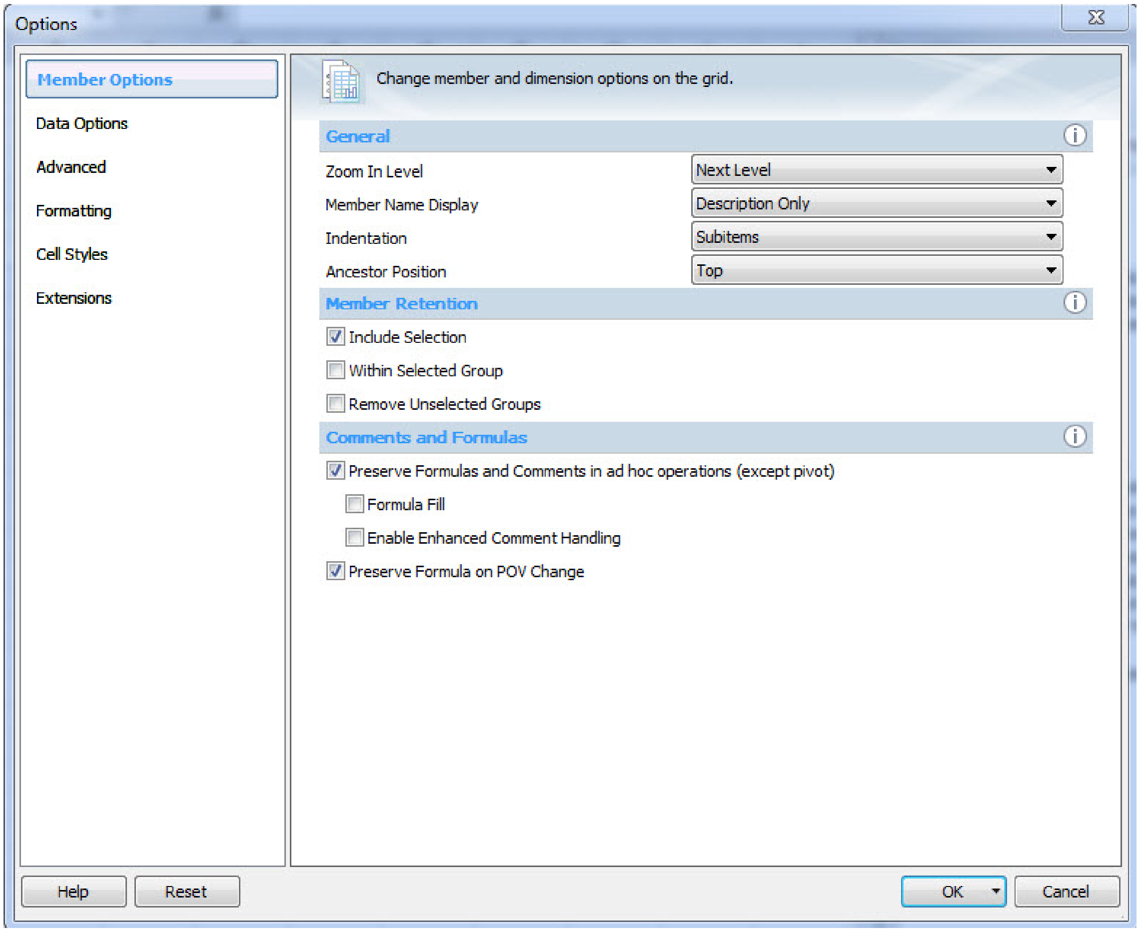
13. Double-click on the form to open it. Or, single-click on the form, and click on the bolded **Open form** button below the forms.



How to Set User Preferences via Options

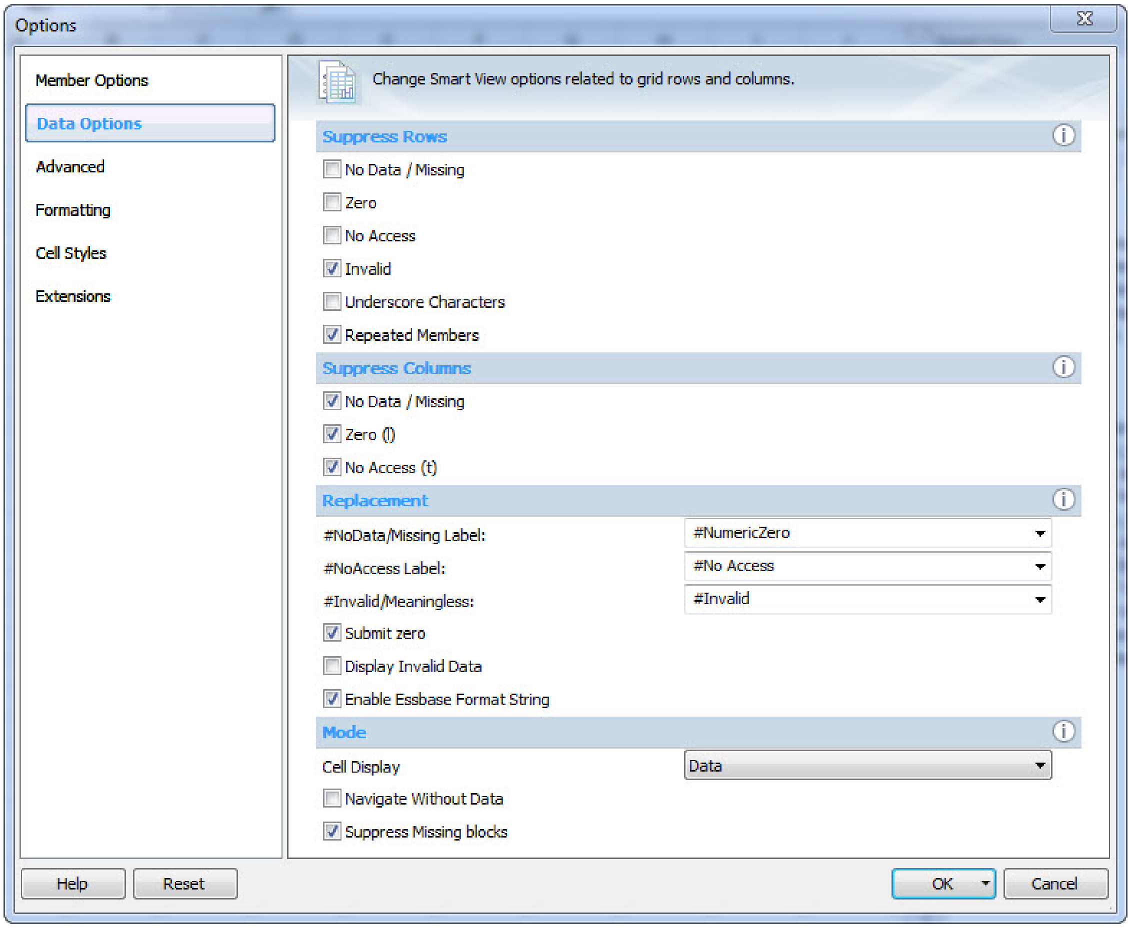
Setting Smart View options is a user preference. The following settings are standard for Finance users.

1. From the Options window, select the **Member Options** tab and set settings as seen in screenshot below:



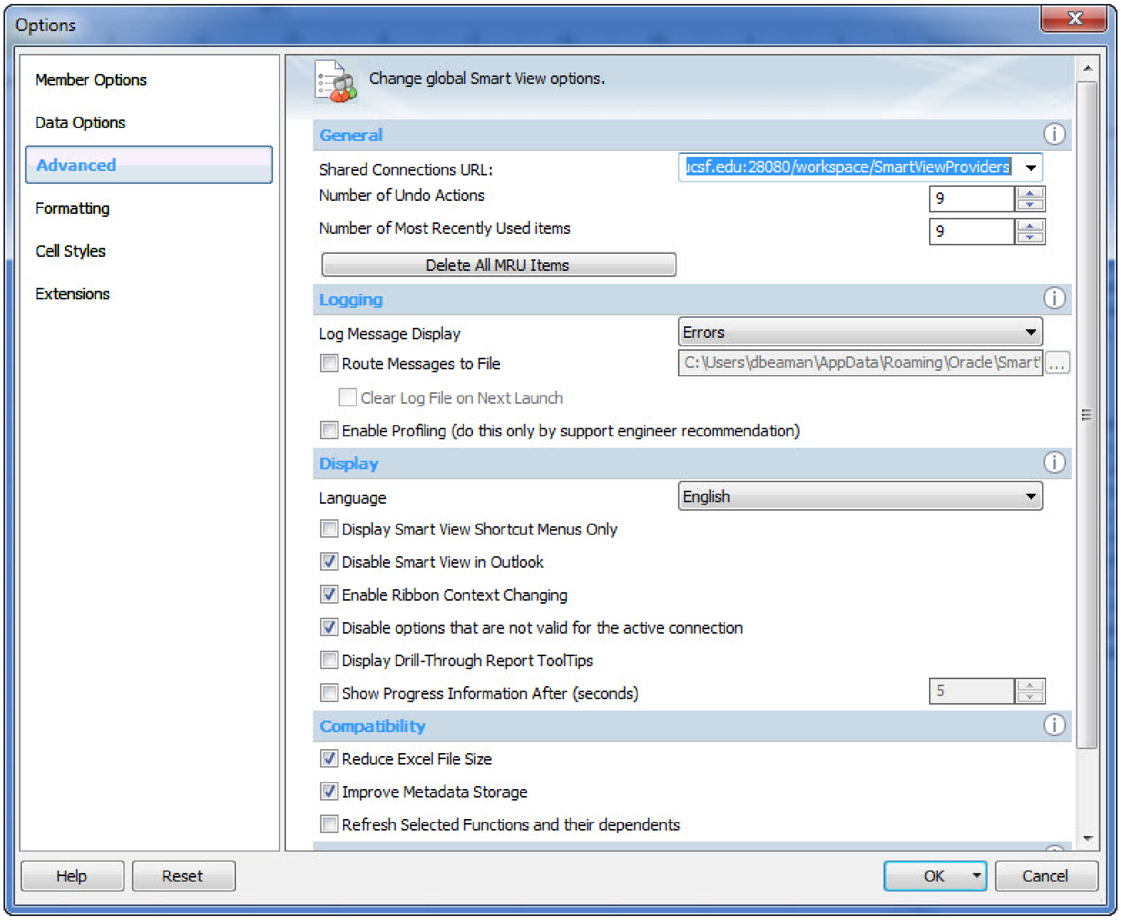
- **Zoom In Level** – used for drilling in to any dimension. Typical user preference is "Next Level." This will drill down one level of the hierarchy at a time.
- **Member Name Display** – choose between displaying Member Name Only, Member Name and Description, or Description Only. For example for DeptID 999999:
  Member Name = "D999999"
  Member Description = "Chancellor UCSF"
  Member Name + Description = "D999999: Chancellor UCSF"
- **Indentation** – choose whether to indent totals, subtotals, or no indentation for visual purposes. Note: indentation of Dimension lists indicates the Dimension's hierarchy.
- **Member Retention** – Include Selection; this will keep totals when drilling in/out on them.
- **Preserve Formulas and Comments in ad hoc operations (except pivot)** – preserves Excel formulas and comments upon Refresh, NOT upon opening a new form on the same worksheet.
- **Preserve Formula on POV Change** – POV (Point of View) box changes will retain Excel formulas.

2. Select the **Data Options** tab and set settings as seen in screenshot below:



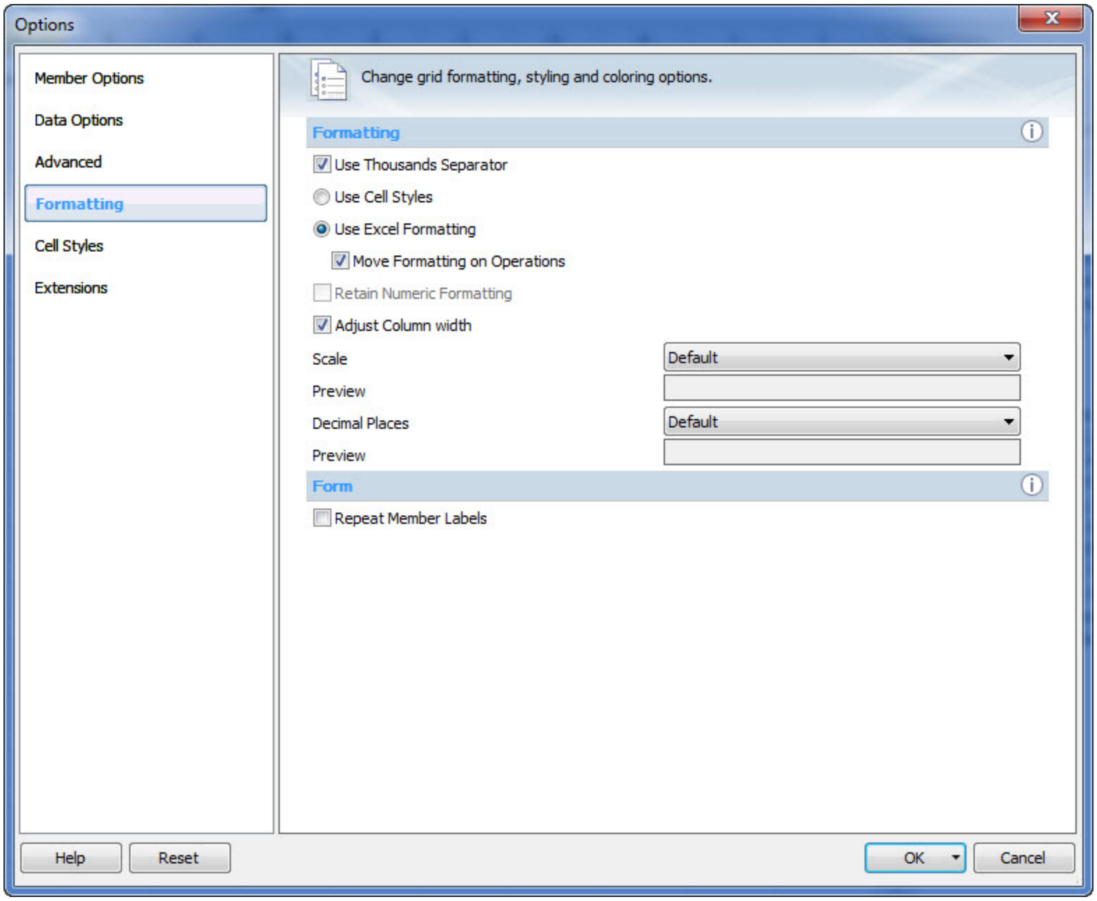
- **Suppression Options (Rows/Columns)** – Choose whether to display blank rows or columns that have no data. Note: Having this option checked will improve query times.
- **Replacement** - This is the text result that appears when query result is zero/no data.
  - **#NoData/Missing** – can be left blank (default); typically set to "-" or "Numeric Zero"
  - **#NoAccess Label** – can leave blank (default); sometimes replaced with "N/A"
  - **Invalid/Meaningless** – #Invalid (default); or #NumericZero
- **Mode** – screenshot options above are default and generally used.
  - Note: "Navigate Without Data" should only be checked when running large queries to see the metadata or dimension structures without needing to see the data.

3. Select the **Advanced** tab and set settings as shown in the screenshot below:



- **Shared Connections URL** – should have been completed in previous section – “Smart View Setup”. Ensure it is set to: http://hyperwebprod01.campus.net.ucsf.edu:28080/workspace/SmartViewProviders
- **Number of Undo Actions** – default is 9; similar to MS Office “Undo” feature; handy option if you drill down too far or refresh query and do not want to keep results.
- **Logging** – this is generally never used. Creates log files and records errors, events and other information. This can help Customer Support IT troubleshoot issues.
- **Display** – screenshot options above are default and generally used.
- **Compatibility** – screenshot options above are default and generally used.
- **Mode** – screenshot option above are default and generally used.

4. Select the **Formatting** tab and set settings as shown in the screen shot below:

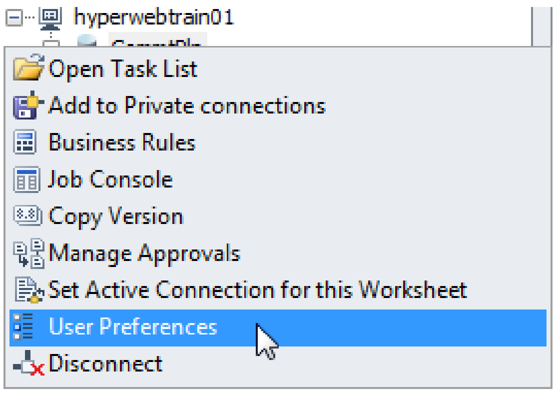


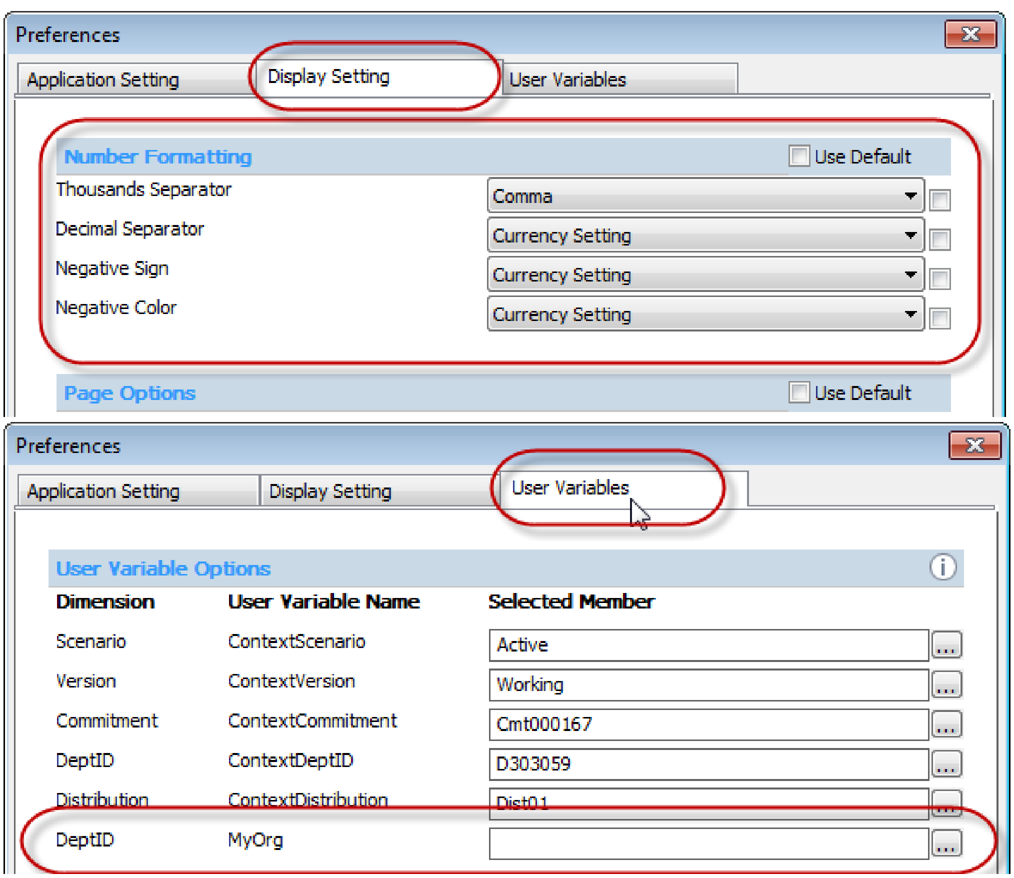
- **Formatting**
  - **Use Thousands Separator –** enables Excel option for thousands separator (comma or decimal); highly recommended
  - **Use Cell Styles –** ability to change the formatting for data and metadata on the form. This is the default option for Planning Forms.
  - **Use Excel Formatting** – retains all Excel formatting. This is an option for Essbase Ad hoc queries.
    - **Move formatting on operations** – retains the Excel formatting such as thousands comma separator and rounding. This is an option for Essbase Ad hoc queries.
  - **Scale** – default will display real value in database. Can change by default to scale to tens, thousands, etc. for report display
- **Decimal Places** – by default, will generally show complete value in cell (including fractions)

5. **Cell Styles** and **Extension** tabs – default options do not need to be change.

How to Set User Preferences via Smart View Panel

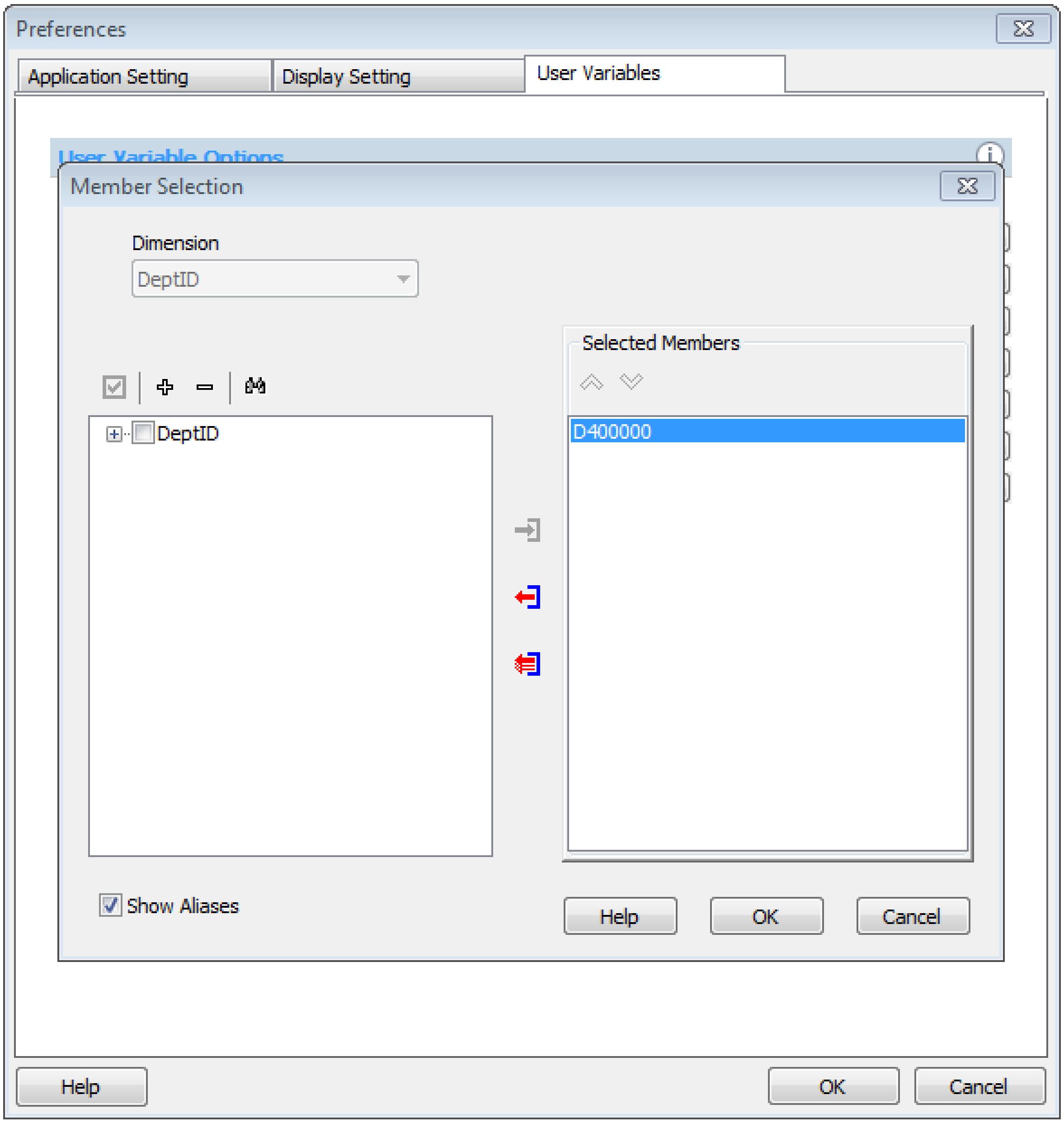
Just as with Planning Web, you can choose your display and user variable options in Smart View. To do this, click on the Smart View Ribbon > Panel button > Right-click on the application you wish to change settings for: UCSFPlan or CommtPlan > User Preferences. The Display Settings tab allow you to choose how data is displayed. **The User Variable Options tab is where you set your MyOrg DeptID**.



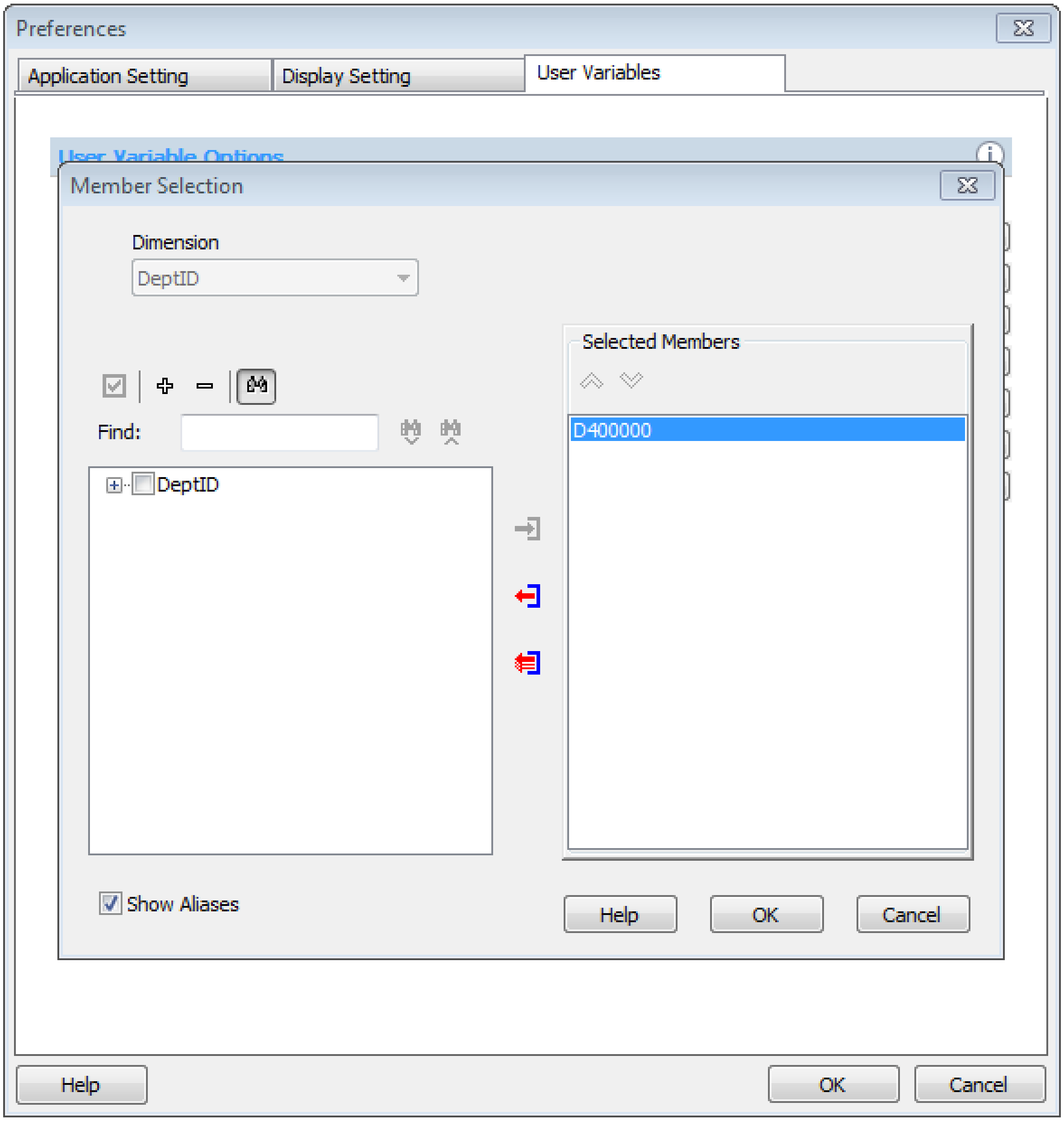


Type your MyOrg DeptID in the Selected Member box. The quick way to do this is to type the number directly into the box. For example, to set your MyOrg equal to the entire campus you would type D999999. If you do not know the DeptID:

1. Click on the elipses box […] and the Member Selection dialog box comes up.



2. Click on the binoculars to search for the DeptID. The Find box appears.



3. You have two options:
    a. Type the DeptID without the D. It will find and select the DeptID for you; or
    b. If you do not know the DeptID, you can expand the DeptID hierarchy, then expand Total DeptID, expand 999999, keep expanding until you find your DeptID. For ease of searching, click the Show Aliases box in the bottom left corner of the dialog box. The DeptID aliases appear along with the DeptID numbers.

4. Once your DeptID is selected, click the right arrow in the middle of the dialog box so that it appears in the right side under "Selected Members". Click ok. Make sure these are set in UCSFPlan and CmmtPlan.

Dimensions in Smart View

Dimensions are metadata within a dimensional database and are the primary way that your data is categorized within the UPlan system. In Smart View, you may notice some dimensions or members that are hidden in the web interface, as described below.

Period

The Period dimension contains an additional member called Admin_Period that is hidden in web forms. This member should not be used for retrievals as it has no data associated with it.

Years

The Years dimension contains members for years not currently included on the General Planning and Employee Planning forms (i.e. 2012-13, 2017-18). In General Planning and Employee Planning, there is no data associated with the outlying years so they should not be used.

Scenario

The Scenario dimension is set up exactly as it is in web forms.

Version

The Version dimension contains a "What If" member that is hidden in the web forms. This member should not be used for retrievals as it currently contains no data.

Fund

The Fund dimension contains an additional group of members under a hierarchy called "Global Assumptions Funds." These members are used within UPlan to assist the Global Assumption process and have no data associated with them so they should not be used.

DeptID

The DeptID dimension contains an additional group of members under a hierarchy called "Input DeptID." These members are used within UPlan to assist the Global Assumption process and have no data associated with them so they should not be used.

Title Code

The Title Code dimension is used to identify the title codes assigned to an individual employee. An employee can have multiple title codes. Title Codes are organized in several hierarchies, including a hierarchy by Title Unit Code. To look up a Title Code and its Title Unit Code, refer to the Title Code lookup in MyReports (Inquiry Reports Tab), the Controller's Office website (Inquiry Reports Tab), or the HR website. Smart View users should use the "All Title_Codes" or "Employee Type" hierarchies for data retrievals. The Input hierarchy is only used to facilitate Global Assumptions processes and contains no data.

Employee Name

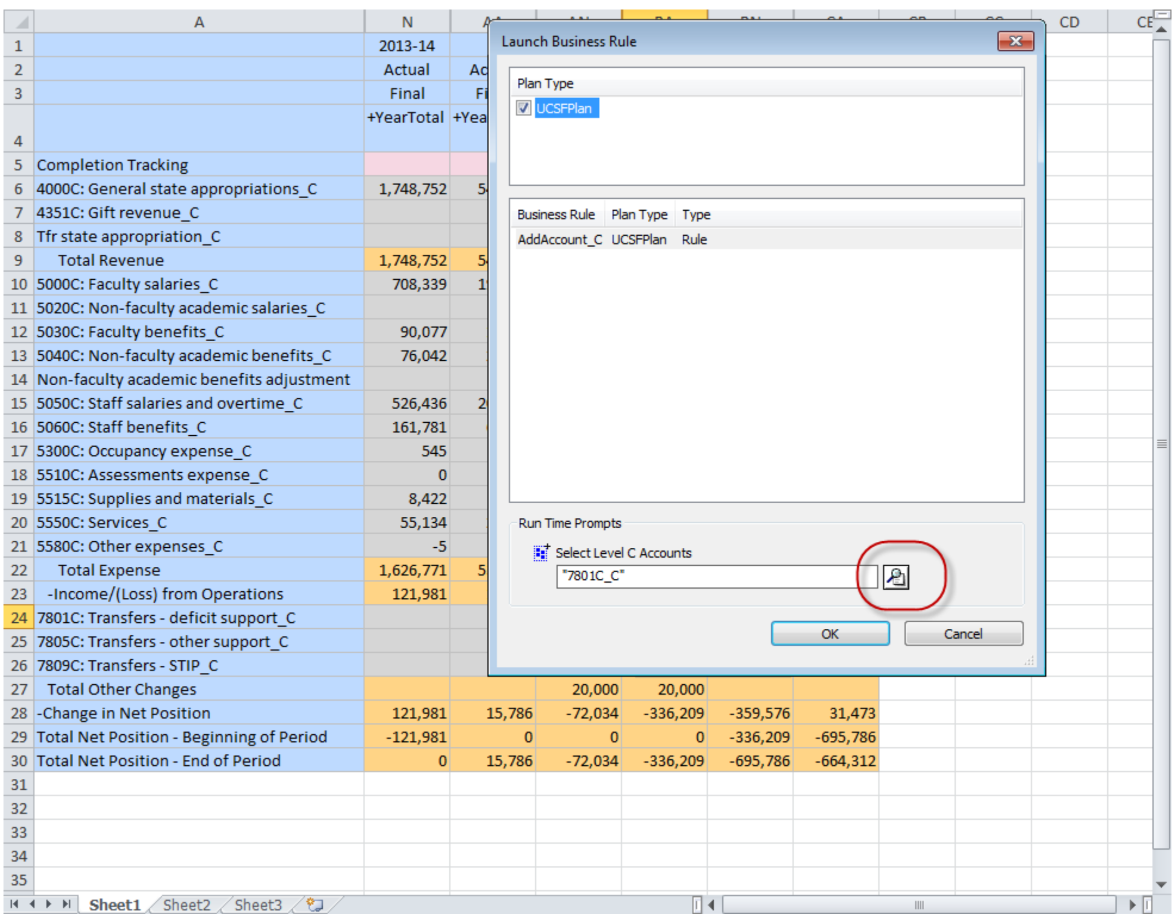
The Employee Name dimension is set up exactly as it is in web forms. Employee names are listed alphabetically based on last name and are grouped by alphabet (e.g., A-C, D-H, I-L, M-Q, R-T, and U-Z).

Project

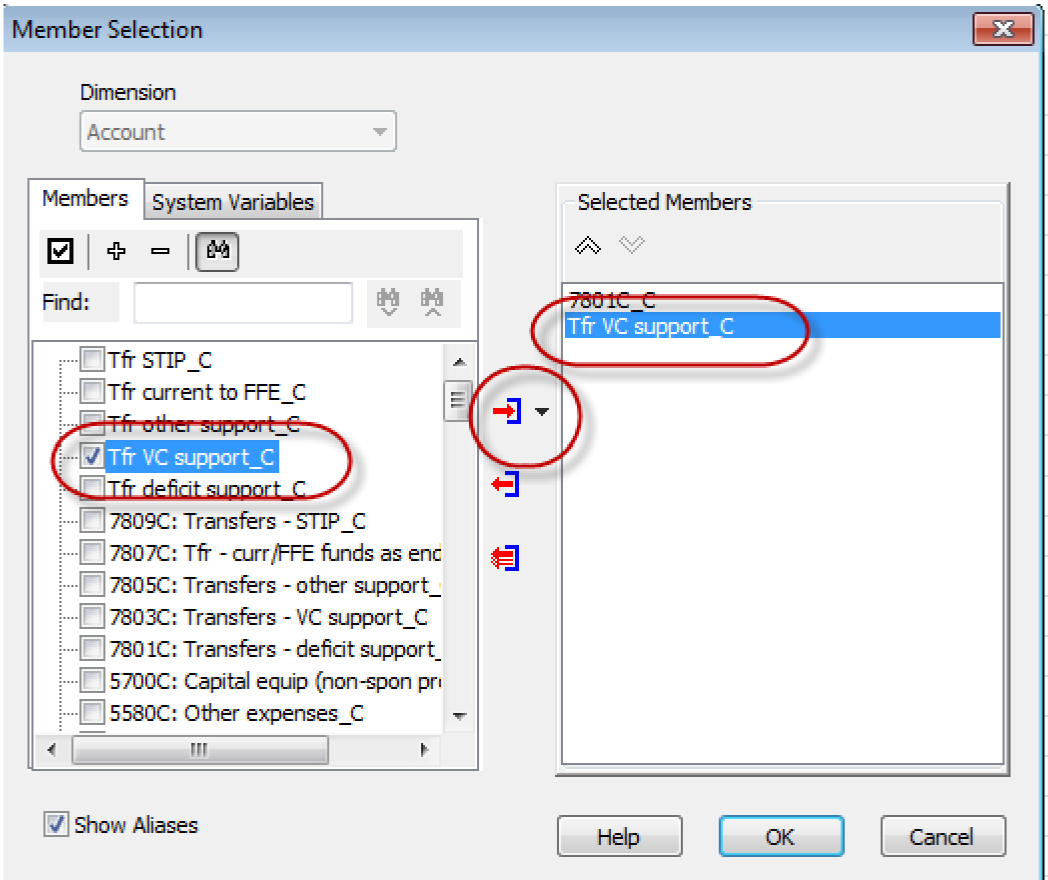
The Project dimension is set up exactly as it is in web forms. The hierarchy includes the Project Use as well as individual Project IDs.

Account

The Account dimension is essentially the same in Smart View as the web **except a**ll accounts are included within this dimension in two separate hierarchies—one hierarchy is for Employee accounts and the other is for General Planning accounts. For a full Account listing you can right-click on any account in any form > hover over Smart View > click Add Account > a dialog box called Member Selection appears > click the magnifying glass button at the bottom > The list of available accounts show up > click the Show Aliases box in the lower left corner > Add relevant Account.

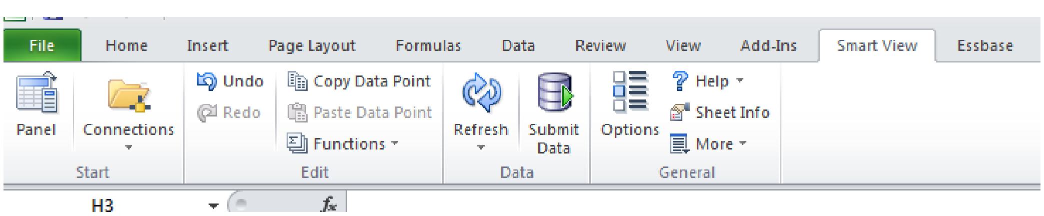


Just as with the MyOrg DeptID, you should select the Account, click the right arrow so that it appears in the Select Members side on the right. It is ok if the current account is already there. You can move that to the left or leave it there. Click ok, then ok again. The business rule is launched.



Navigating with the Smart View Ribbon

The Smart View tab acts as the hub for connecting to applications. The Smart View tab will appear upon opening Excel and will stay open regardless if you are connected or not. All relevant buttons are outlined below.



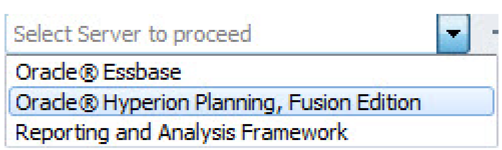
Item	Description

Panel	Used to connect and disconnect to and from UPlan servers and databases.
Connections	This button is not used.
Undo/Redo	Undo/redo the previous ad hoc operation. Once data is Submitted, these buttons do not work.
Copy/Paste Data Point	Just like Excel, however will not paste values a second time.
Functions	Not currently using these options.
Refresh	Refresh the data and metadata on the current worksheet from the data source.
Submit Data	Submits data back to the Planning database. Be careful, there is no Undo. This button only works at planning-level intersections.
Options	**Allows user to** set a variety of preferences for working in Smart View **.**
Sheet Info	Display whether the sheet has an active connection and if so, to which server, application and database.
More	Not currently using these options.

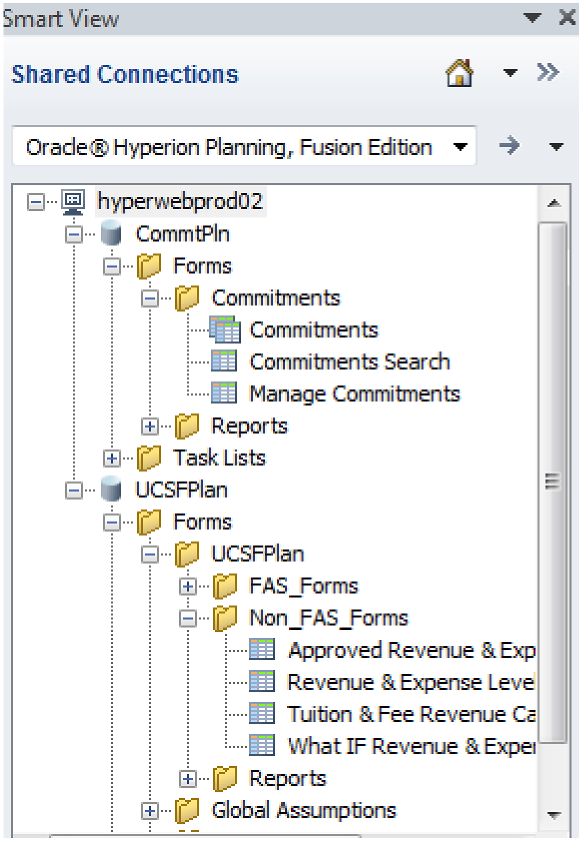
Planning Forms in Smart View

Accessing Planning Forms via Smart View

1. Planning Forms via Excel is available using Hyperion Planning Fusion Edition. Go to Shared Connections and select the Oracle Hyperion Planning, Fusion Edition server in the drop down menu.



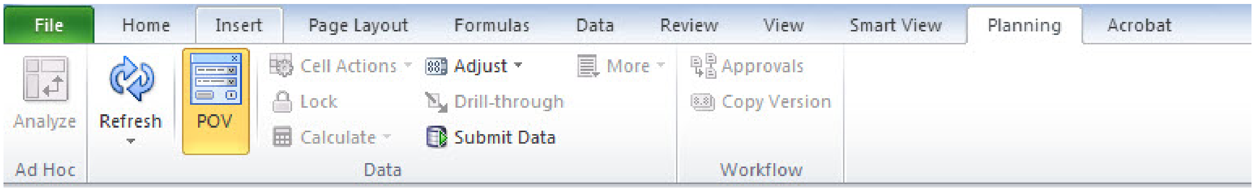
2. All of the databases for UPlan will appear.



3. Expand the Server you are connected to. It is either HYPREWEBPROD01 OR HYPERWEBPROD02.
4. Expand the Forms folder in each of the databases.
5. Double-click on the form to open, or single-click on the form then single-click on Open Form.
6. The form opens and the Planning tab appears.
7. Note: you can select regular data entry forms, landing pages, and form reports. From landing pages, you can navigate to data entry forms. Data can only be submitted via a data entry form.

Navigating with the Planning Ribbon

The Planning tab becomes active when the worksheet becomes connected to a planning database. It shows the specific options for planning on the data entry forms. All relevant buttons are outlined below. The most commonly used buttons are also located on the Smart View tab such as Refresh and Submit Data.



Item	Description
Analyze	Creates a new tab for ad hoc analysis. This button is not used.
Refresh	Erase any unsubmitted data and refresh with data and metadata from the UPlan database.
POV	Make the POV drop down menus visible or not visible.
Cell Actions	Insert Comment, Supporting Detail, Attachment or view Cell History for this intersection. None of these are viewable in Form Reports or Financial Reports (FR).
Lock	Lock the cell you wish to remain unchanged. Cell unlocks itself upon refresh or submit.
Calculate	There is no reason to use these. All relevant business rules should be run via the right-click menu options.
Adjust	Adjust a cell by a certain value up or down, multiplier, divider, or percentage up or down.
Grid Spread	Adjust a cell and its spread pattern across periods if not proportional (default).
Drill Through	Not currently activated.
Submit Data	Sends data to the UPlan database.
Approvals	Not currently activated.
Copy Version	Copy Draft Version into Forecast or vice versa.

Using Planning Forms in Excel

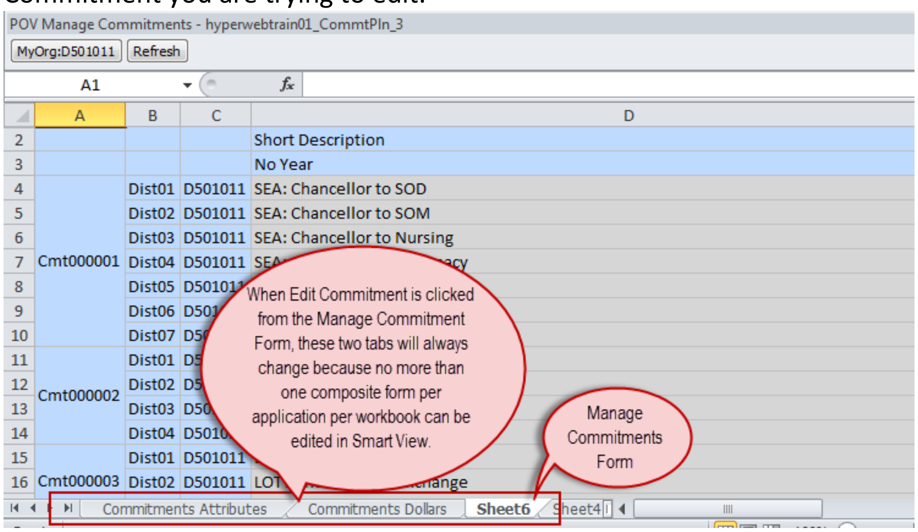
Everything you can do in the web forms you can do in Excel. In fact, Excel allows for even greater functionality because you can use normal Excel features such as Freezing window panes, cell references, and formulas.

Navigating Forms in Smart View

The forms you access via Smart View will look and feel very similar, but not identical, to the web forms.

- **Cell Shading:** In Smart View, cell colors are somewhat different. Writable cells are light yellow instead of white. Unsaved cells are dark yellow.

- **Expand/Collapse:** To drill down or expand a dimension, double-click on members with a + sign, such as YearTotal; double-right click to collapse/zoom-out, such as Months.
- **Point of View:** To retrieve data for another intersection, use the drop-down menus in the POV at the top of the form and hit the refresh button. Note the POV is not a Hyperion Smart List so the drop down menus use "type-ahead" and Excel Tab and Enter functionality. The retrieval speed is markedly faster than the web forms.
- **Composite Forms:** Composite forms will appear as multiple tabs when accessed via Smart View. For example, the Edit Commitment form will appear as two separate worksheets – one for Commitments Attributes and one for Commitments Dollars. Note that the Excel interface will only allow you to work in one composite form at a time per application per workbook. For example in CommtPlan this means right-clicking to Edit Existing Commitment from the Manage Commitment Form open a new workbook with two new worksheets (one tab for each tab in the composite form). Commitment Attributes is the first tab and Commitment Dollars is the second. However if you navigate back to the Manage Commitment tab, or open a second Manage Commitment tab, right-clicking on a different Commitment number, then choosing Edit Existing Commitment, Smart View will always populate the second workbook with the most recent Commitment you are trying to edit.



Updating Forms

Planning in Excel works exactly like the web form with a few differences.

1. **Entering Data:** As with web forms, you can enter data in any writable cell simply by clicking on the cell and entering a value.
2. **Right-click Menus:** In Smart View, right-click menus work similarly to those in the web forms, although options are found by right-clicking on the Account > click on/hover over "Smart View" > select the appropriate option.
3. **Copy and Paste:** By using the right-click menus, using Ctrl+C and Ctrl+V, or using the icons on the Planning ribbon, you can copy and paste values from one cell to another. However, if you

try to Copy/Paste by clicking Ctr+C and Ctrl+V within the form twice, it will not paste the values a second time.

4. **Adjust Data and Grid Spread:** These options for updating data work similarly in Smart View and can be accessed via right-clicking or using the icons in the Planning ribbon.
5. **Add/Remove Rows:** As in web forms, add or remove rows or by right-clicking on the account and selecting Smart View > Add/Remove Account/Commitment/Distribution.
6. **Navigating from Landing Pages**: If you use a right-click menu on a landing page to access another form, the new form will appear in a new Excel worksheet. For example, if you choose Edit Existing Commitment from the right-click menu of the Commitments landing page, a new Excel worksheet will appear containing the commitment data entry forms.

Using Excel Features

- Move from cell to cell using your keyboard arrows.
- Enter data in white cells outside the boundaries of the data entry form.
- Reference other cells (e.g., “=B5”).
- Calculate values (e.g., “=10*B5).
- Hide/unhide rows or columns just like in Excel.
- Freeze panes just like in Excel.
- You may add as many tabs you wish to your Excel worksheet.

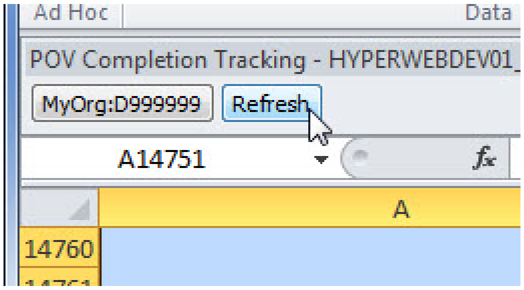
#Missing

- #Missing = no data in that cell/intersection.
- You can enter data in a cell that says #Missing as long as it is a writable intersection.
- You can eliminate data in a cell by entering #Missing instead.
- You can use the Options menu to change #Missing to a Blank cell or NumericZero by going to your Smart View ribbon> Options button > Data Options > Replacement section.
- **NOTE: #Missing ≠ Zero. Zero is a data value whereas #Missing is the absence of data.**

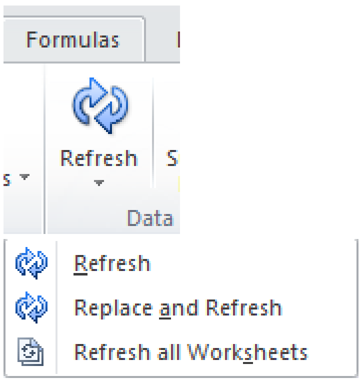
Refresh Buttons

Typically, there will be two Refresh options when accessing forms via Smart View.

- The Refresh button in the POV (next to the drop down menus) is the Go button in web forms. Selecting this Refresh button refreshes the form for the POV combination selected, just like on web forms. You must click the Refresh button to update the POV for the form.



- The Refresh button on the Smart View ribbon includes several options:

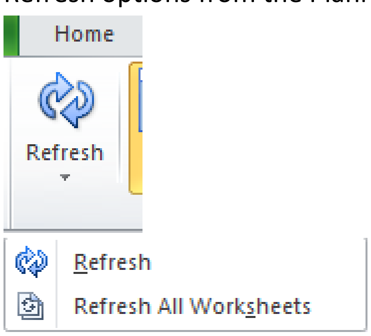


a. **Refresh** erases any unsaved data on the form and retrieves the most current data and metadata from the UPlan database. This button does not erase formulas, even if they have not been submitted.

b. **Replace and Refresh** any unsaved data on the form. Does not refresh formulas that have not been submitted. Pulls in most current data from the database.

c. **Refresh All Worksheets** erases any unsaved data on the form and retrieves the most current data from the UPlan database for all worksheets. This button does not erase formulas, even if they have not been submitted.

- Refresh options from the Planning ribbon:



a. **Refresh** erases any unsaved data on the form and retrieves the most current data from the UPlan database. This button does not erase formulas, even if they have not been submitted.

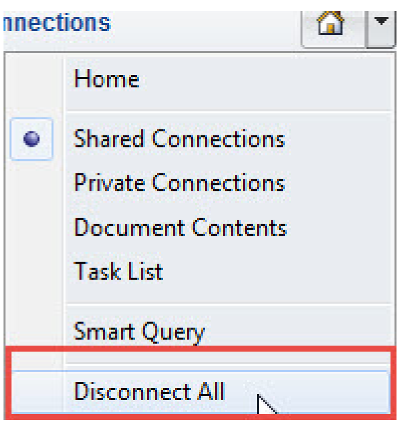
b. **Refresh All Worksheets** erases any unsaved data on the form and retrieves the most current data from the UPlan database for all worksheets. This button does not erase formulas, even if they have not been submitted.

- **No Refresh button options will erase your formulas.**
- **Smart View Panel > Double-clicking Form or Open Form > WILL erase your formulas.** This pulls the form and data from the database (where no formulas exist). If you need to re-open the Form this way, Copy the Worksheet then Paste the data [including formulas] into the re-opened worksheet.

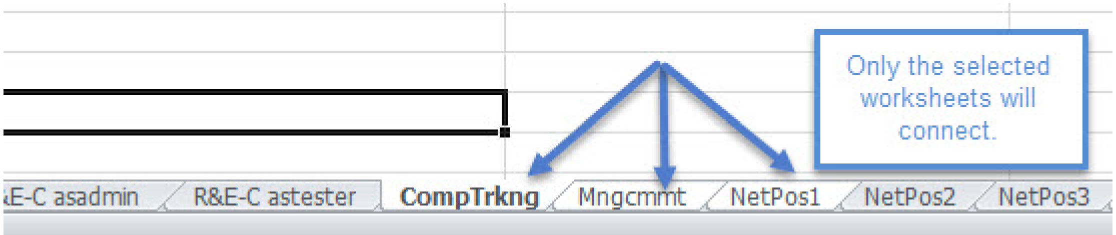
Using Multiple Tabs

From within a single Excel workbook, users can use multiple worksheet tabs to connect to forms more than once for different POV combinations or connect to multiple forms.

- To connect to an additional form from within a workbook, simply navigate to a new Excel worksheet and repeat the connection steps described earlier.
- You may connect as many tabs to UPlan as you wish (Planning or Essbase), however **performance tends to decrease with more than a few connections**. Excel may become unresponsive or crash. In this case, go to your panel, click Disconnect All (screenshot below) > Reconnect to only one or two necessary worksheets at any time. If this does not work, try Saving your Excel.xlsx file, closing, opening file, connect to only the worksheets you wish to submit data for.



- When opening an Excel file with multiple worksheets with previous connections, using Ctrl + selecting only the worksheets you wish to connect. This will selectively connect the worksheets to the databases you had previously connected to.

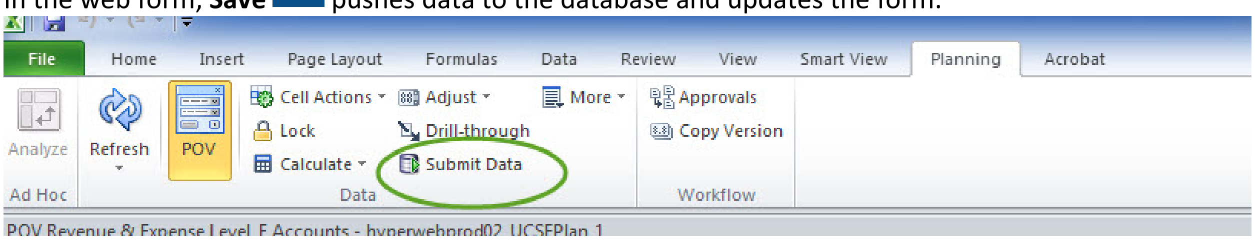


- Closing Excel will automatically disconnect from any and all active connections.
- Opening Forms options are identical to Planning Web. If a Form is Open and Connected in Smart View and you want to navigate to another form simultaneously you have two options:
  a. Option 1: From current open form, navigate to Smart View Panel > double-click on a different form or click Open Form. **However just like Planning Web, this option erases any unsaved data, AND since it is Excel will erase any formulas you had on the current form.**
  b. Option 2: From current open form, **navigate to a new blank Excel worksheet**, Smart View Panel > Connect to database > Open different Form. This preserves the formulas and unsaved data in other open forms.

Save versus Submit versus Open Form in Smart View

While using Smart View, you can **save** your Excel file to your desktop or shared drive, and you **submit** data to UPlan. These are distinct, separate actions.

- In the web form, **Save** pushes data to the database and updates the form.



- In Smart View, **Submit Data** pushes data to the database and updates the form. Submit Data buttons appear in both the Smart View and Planning ribbons. (Although the icons look different the functionality is the same.)
  - Just like planning web, Submit Data will send all unsaved data in a composite form back to the database.
  - Submit Data for multiple active worksheets at the same time by selecting the worksheets using Ctrl + select worksheets > Submit Data on any active worksheet.
  - Once data is submitted to the UPlan database the Undo feature will no longer work.
  - In Smart View, Excel > File > Save/Save As saves a local Excel.xlsx version of your document. It does not Save or Submit anything back to the database. If you save data in your workbook on your local desktop without having submitted changes to the UPlan database, you can return later and still submit the data, as long has you have not clicked on the Refresh button in the Planning ribbon.

The following table can be used when trying to remember the differences between Submit, Save and Open Form.

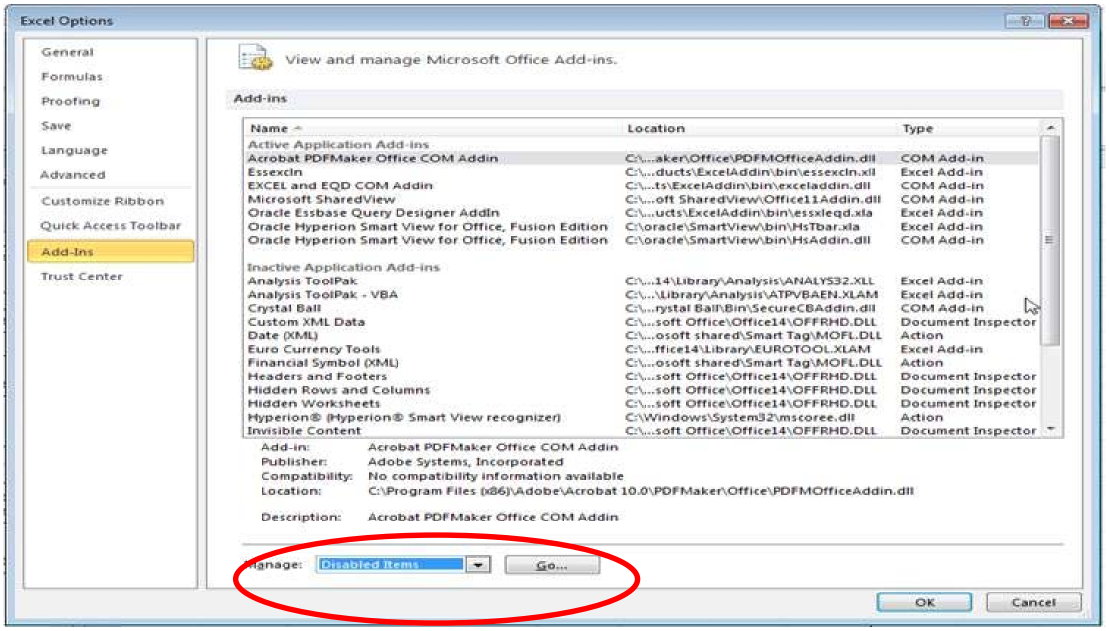
Action	What it does	Risks	When to use
Ctrl+S (Save)	Saves a version of your form to your computer	Does not send data to the UPlan database	Only use if you have formulas, cell references or supplemental data in your workbook; if you do save your workbook locally, always use it to make further changes to your plan/forecast
Refresh	Refreshes the data on your form with current data from the database for the POV selected	Does not save or submit any changes you made (except formulas are retained)	If you have made a mistake that has not yet been submitted to UPlan and want to start over
Submit Data	Sends data to the UPlan database	Does not save data locally; cannot Undo after you Submit Data	Often – while you don't need to submit data every time you make a change, submitting frequently ensures you don't lose your work
Open Form	Re-opens your form with current data from the UPlan database for the POV selected	Does not save or submit any changes you make (including formulas)	Only as a last resort

User Support for UPlan Smart View

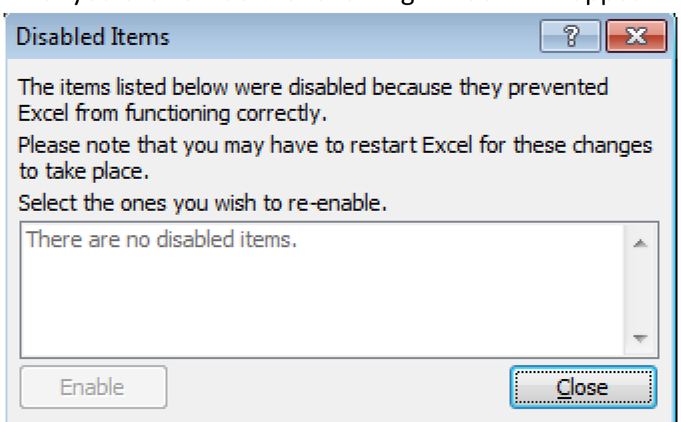
Troubleshooting

What do I do if Smart View becomes disabled in my Excel app?

1. Open Excel and go to File > Options > Add-Ins.
2. On the Manage drop down list at the bottom of the Options window, select "Disabled Items" and click Go.



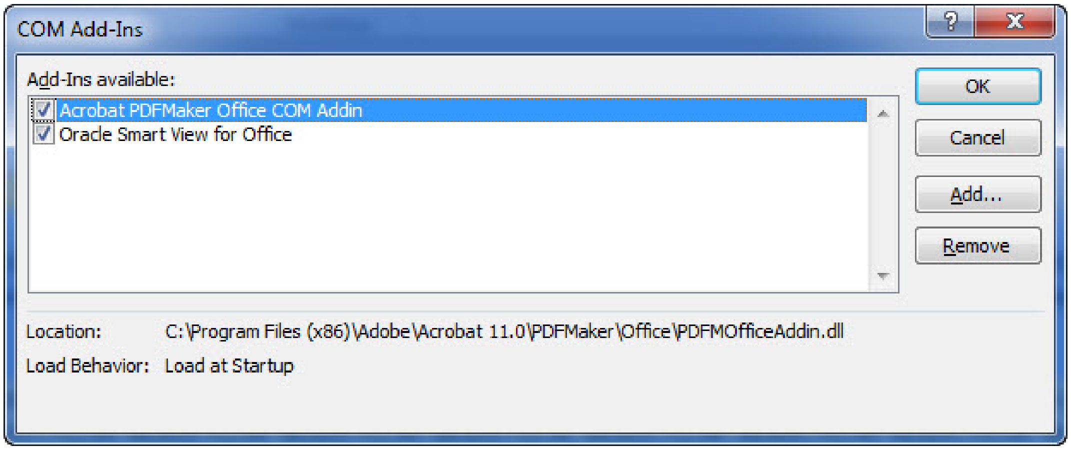
3. After you click on Go the following window will appear.



4. In the case where Smart View was disabled, you will see Smart View in the disabled items box.
5. Select Smart View and click on Enable.
6. Close Excel.
7. Re-open Excel. Smart View should show up again.

What do I do if it still does not work?

1. Open Excel and go to File > Options > Add-Ins.
2. On the Manage drop down list at the bottom of the Options window, select “COM Add-ins” and click Go.
3. After you click Go the following window will appear.



4. In the case where Smart View is not checked, check the box.
5. Close Excel.
6. Re-open Excel. Smart View should show up again.

UPlan User Support Info

For user support on UPlan’s Smart View, contact your UPlan Control Point Coordinator.