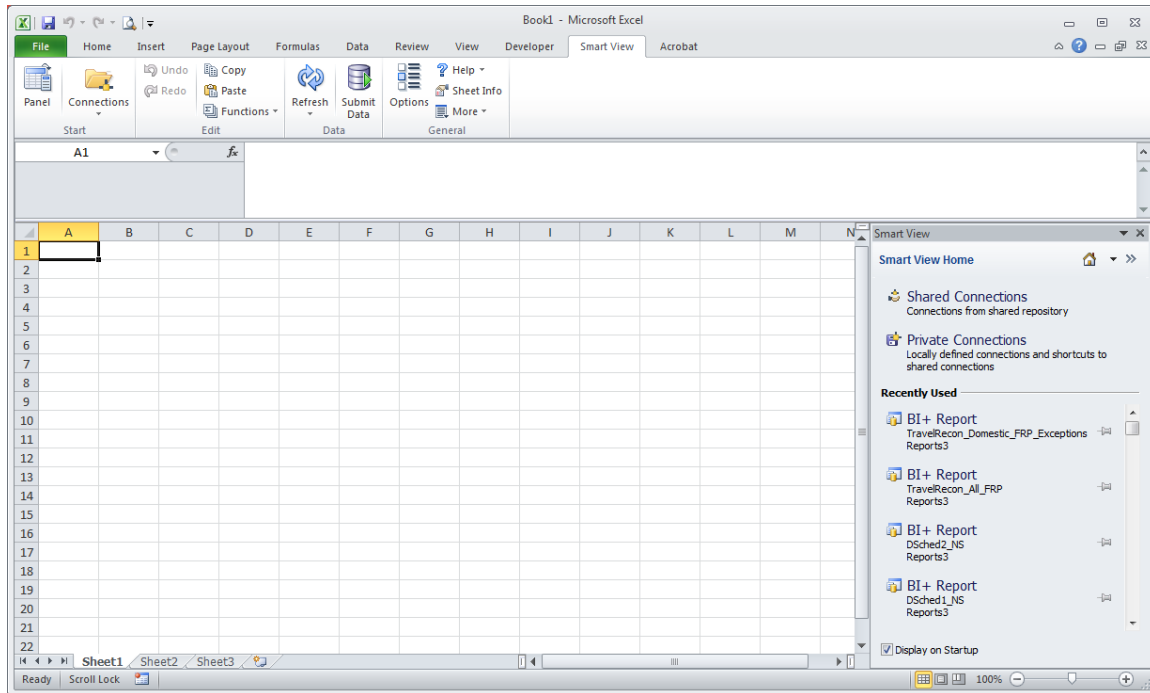
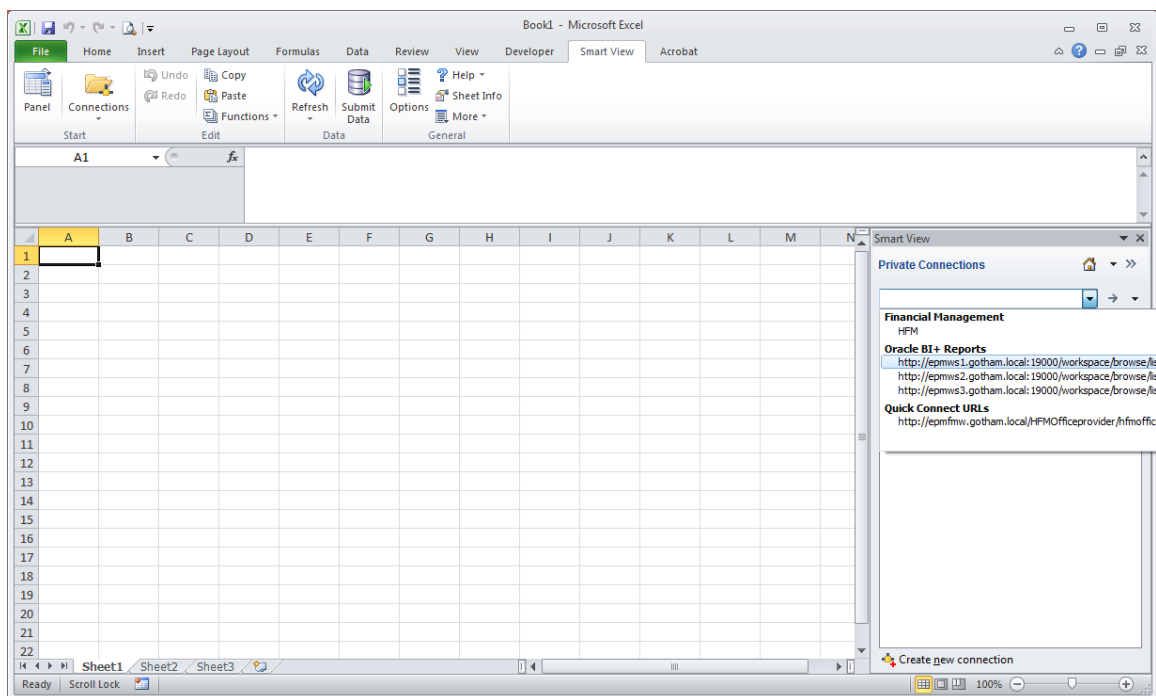


Exporting HFM Reports to Excel using Smart View

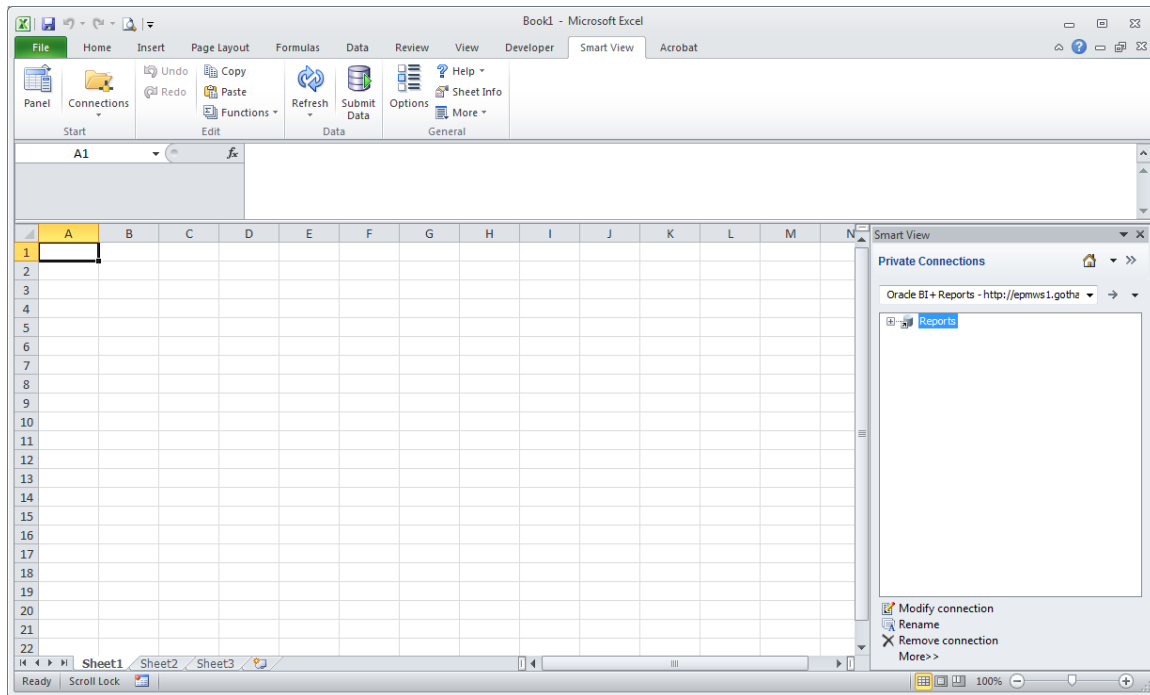
- 1) Open Excel and go to the **Smart View** tab. Click on the **Panel** button.



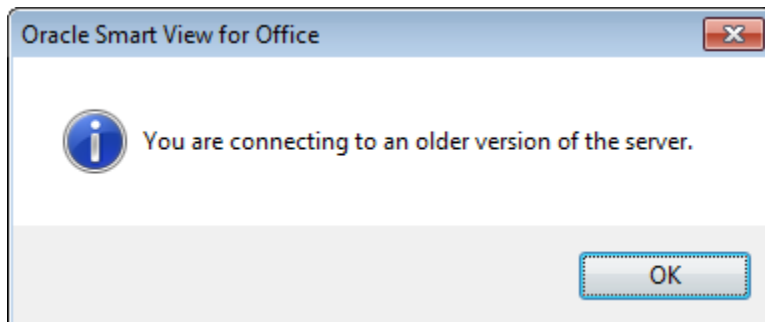
- 2) On the right panel click on **Private Connections** and then select the pull-down menu. Choose any one of the three options under **Oracle BI+ Reports**.



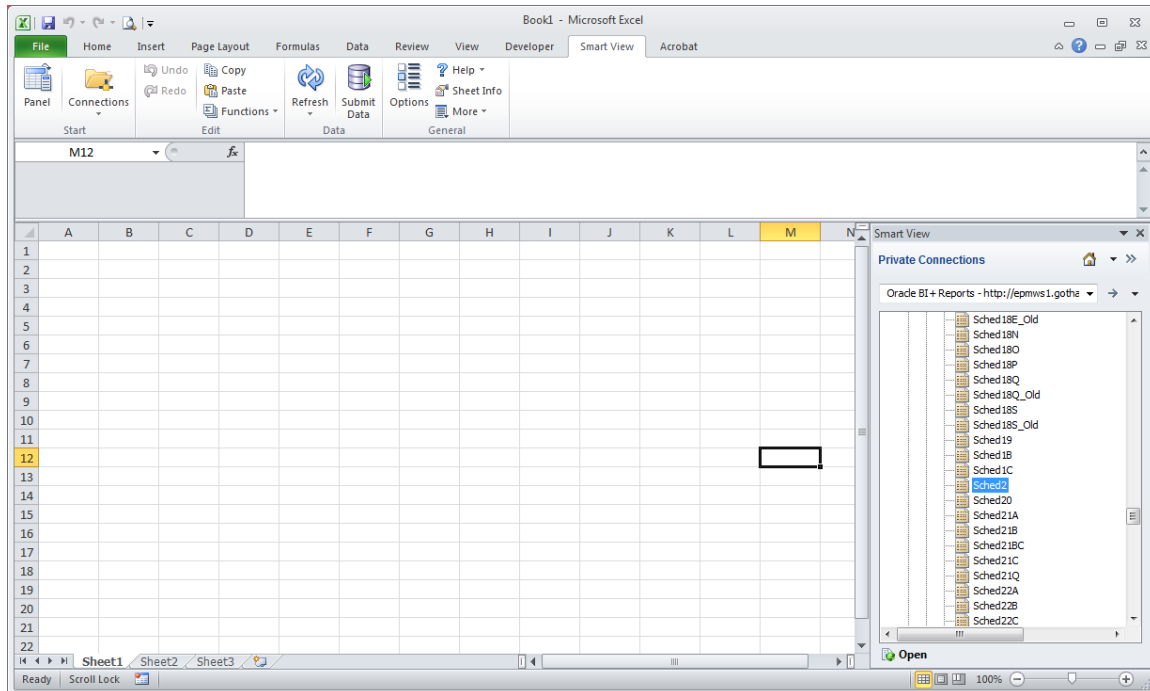
3) Click on the + sign to expand where it says **Reports**.



4) You will get the following error. Click **OK** to proceed.



- 5) Browse the folder structure to find the report you wish to export. In this case we are exporting our Income Statement, the report name for which is **Sched2**. It can be found under **Maximus... Schedule** reports.



- 6) Double click on the report and you will see a User Point of View preview screen. Change the report point of view if desired and then click **Next**.

A screenshot of the "Import Workspace Document" dialog box. The dialog has a title bar with a close button. It contains two tabs: "1. Select a Document" and "2. Preview User Point of View", with the second tab selected. Below the tabs, a message states: "This report/book will run for the members on the user point of view listed below." There are six input fields, each with a "Select..." button to its right: "Scenario" (containing "Actual"), "Year" (containing "2016"), "Period" (containing "Jul"), "Entity" (containing "OMNIWW.HISTORY"), "Value" (containing "<Entity Currency>"), and "Custom4" (containing "[None]"). At the bottom of the dialog, there are four buttons: "Help", "< Back", "Next >", and "Finish", followed by a "Cancel" button.

- 7) You will now see a previewed version of your report with some additional output options. Click on **Finish**.

Import Workspace Document

1. Select a Document > 2. Preview User Point of View > 3. Respond to Prompts > 4. Preview

Scenario: Actual Year: 2016 Period: Jul Entity: OMNIWW.HISTORY Value: <Entity Currency> Custom4: [None]

OmnicomGroup

Profit and Loss Statement

Grid POV: View: <Scenario View> ICP: [ICP None] Custom1: [None] Custom2: [None] Custom3: [None]

		Actual 2016 July	Actual 2015 July
REVENUES	0308	-	-
COMPENSATION			
Payroll	0353		

☐ All Pages
☐ Split Pages across worksheets
☐ Refresh Using Workspace Point of View

Import Document As
Fully Formatted

Help < Back Next > Finish Cancel

- 8) You report will now appear as a new tab in your existing Excel workbook.

Book2 - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Developer Smart View Acrobat

Panel Connections Undo Copy Paste Refresh Submit Data Options Sheet Info Help More

Start Edit Functions Data General

16 fx

OmnicomGroup		Equity History OMNIWW.HISTORY Actual July 2016	
Profit and Loss Statement			
		Actual 2016 July	Actual 2015 July
REVENUES	0308	0	0
COMPENSATION			
Payroll	0353	0	0
Payroll - Project/Incentive/ Temporary Help	0353PHOU	0	0
Total Payroll	0353TOT	0	0
Other Employment Related Costs	0357	0	0
Incentive Compensation Expenses	0362	0	0
Pension & Post Employment Expense	0365TOT	0	0
Other Compensation Costs - Benefits	0366BENE	0	0

Smart View

Document Contents

Smart View - All Connections

http://epmws1.gotham.local:19000/workspace/brow
Sched2
http://epmws1.gotham.local:19000/workspa

Modify Connection

Ready Scroll Lock