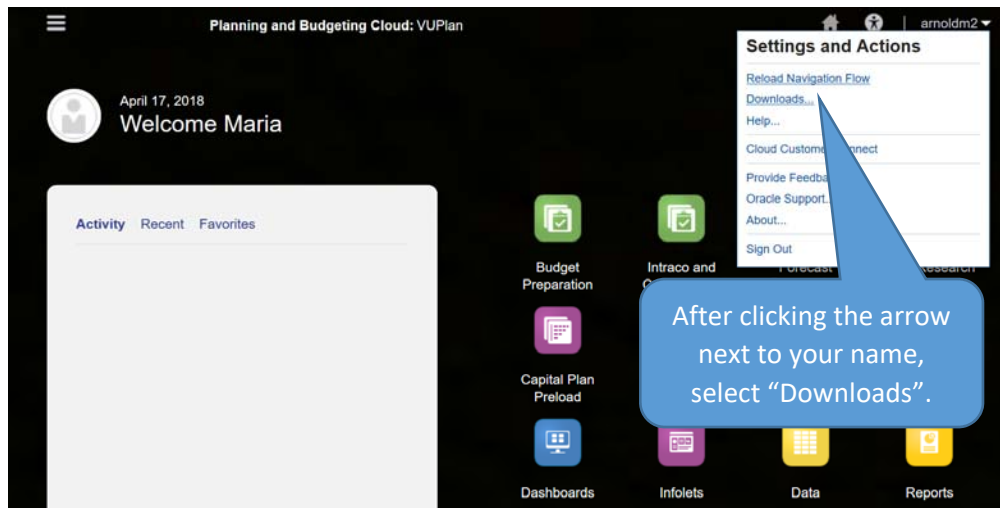
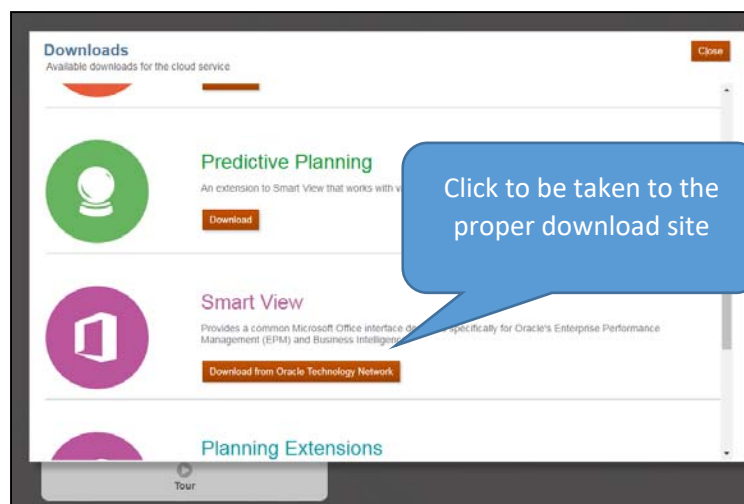


Installing Smart View for ePBCS

1. After signing into Planning & Budgeting Cloud, click on the arrow in the top right corner next to your username.

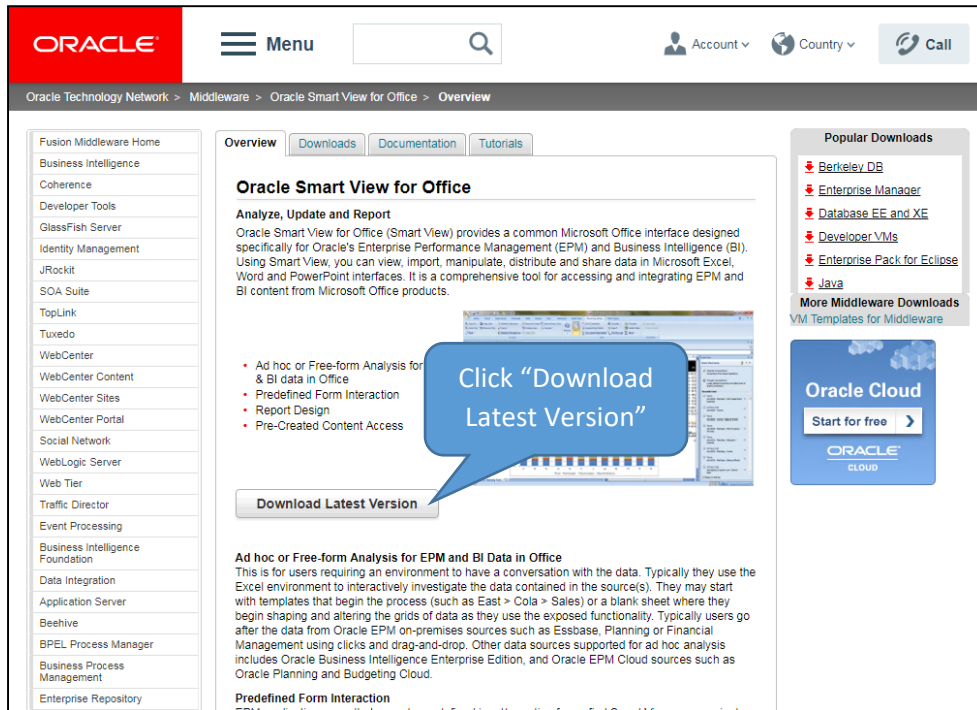


2. A window will appear with various download options. Scroll down to Smart View and select **Download from Oracle Technology Network**.

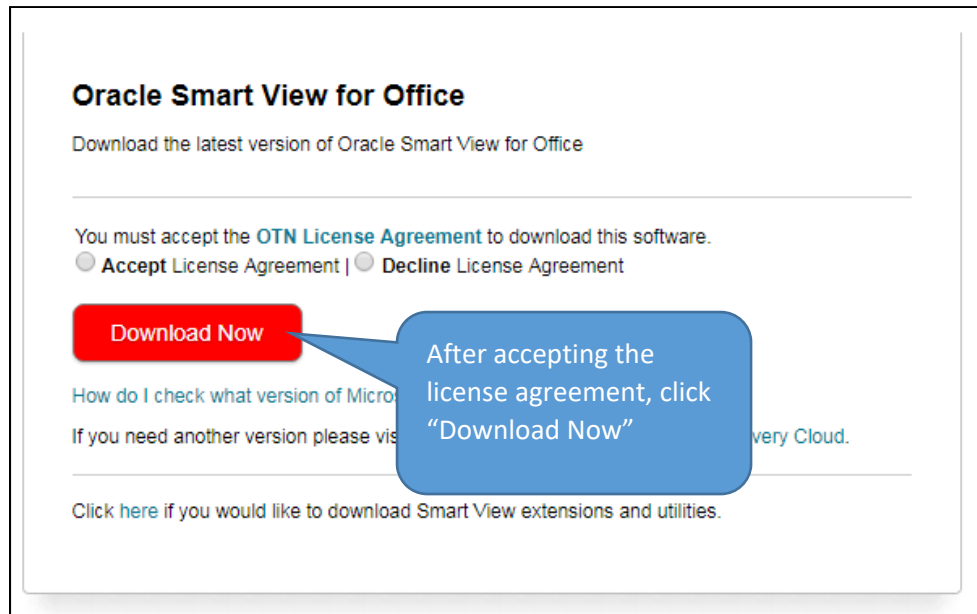


3. After being redirected to the Smart View section on Oracle's Technology Network (if the link does not work, you can type in the following website into your browser: <http://www.oracle.com/technetwork/middleware/smart-view-for->

[office/overview/index.html](#)), click **Download Latest Version** to download the latest version of Smart View.



4. Read through the OTN License Agreement. You will be prompted to either Accept or Decline; users must accept the agreement to download Smart View.



5. Signing into an Oracle account is required to download Smart View. Use an existing Oracle account or create a new one.

An Oracle account is required to sign in and download Smart View

This account is separate from any existing Vanderbilt ID and is used for Oracle products. Many users do not have Oracle accounts

Sign in

Username

Password

Sign in

Don't have an Oracle Account?

Create Account

© Oracle | Terms of Use | Privacy Policy

If you do not have an existing Oracle account, click "Create Account" and follow the steps to create an account.

6. If a new account is created, an email will be sent to verify the account after populating the required information. Sign in once the account is verified.

Create your Oracle Account

Already have an Oracle Account? [Sign In](#)

Email Address* Your email address is your username.

Password* Passwords must have upper and lower case letters, at least 8 numbers, not repeat any part of your email, and be at least 8 characters long.

Retype password*

Country*

Name*

Job Title*

Work Phone*

Company Name*

Address*

City*

State/Province*

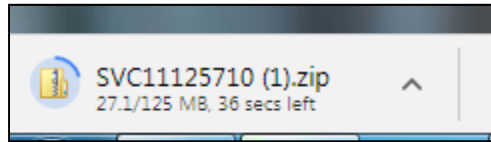
ZIP/Postal Code*

Yes, send me e-mails on Oracle Products, Services and Events.
You may opt-out of all marketing communication: [Unsubscribe](#)

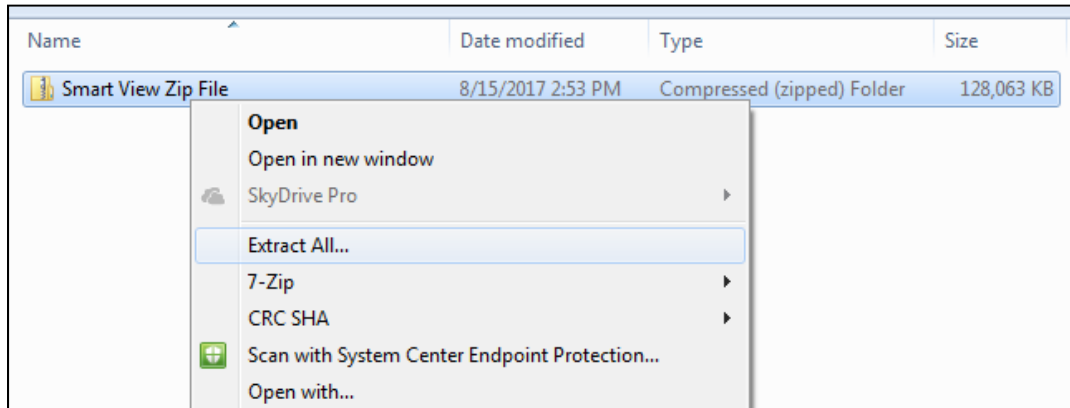
By clicking on the "Create Account" button below, you understand and agree that the use of Oracle's web site is subject to the Oracle.com Terms of Use and Oracle's Privacy Policy, including the fact that Oracle may transfer your personal information collected in connection with your registration on this website to its affiliates globally and to third party entities that provide services to Oracle.

Create Account

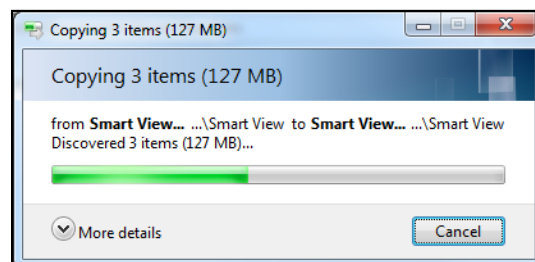
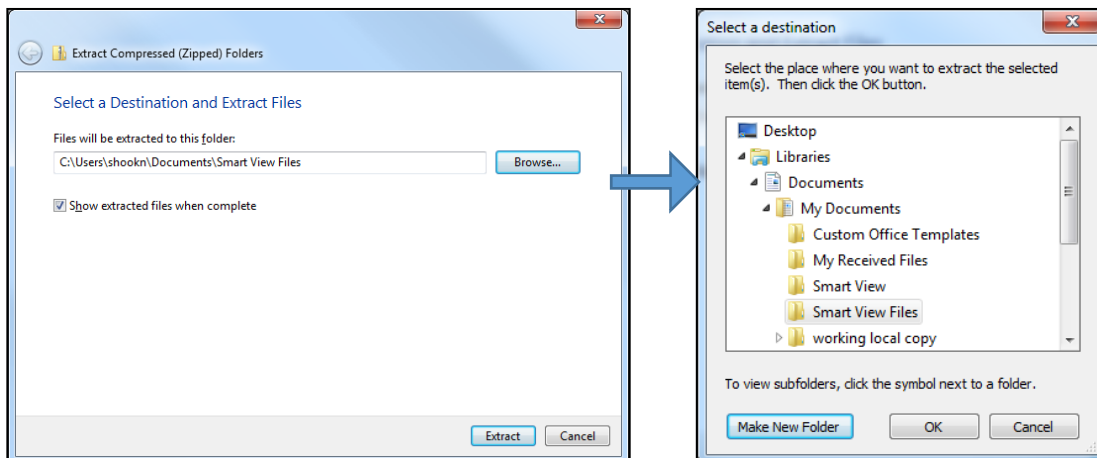
7. After signing in, the Smart View executable zip file will automatically download.



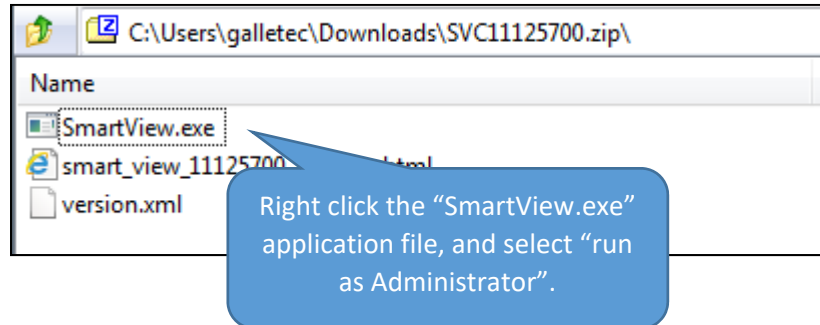
8. Under Computer > Downloads, locate the downloaded .zip file, right click on the file, and choose **Extract All**.



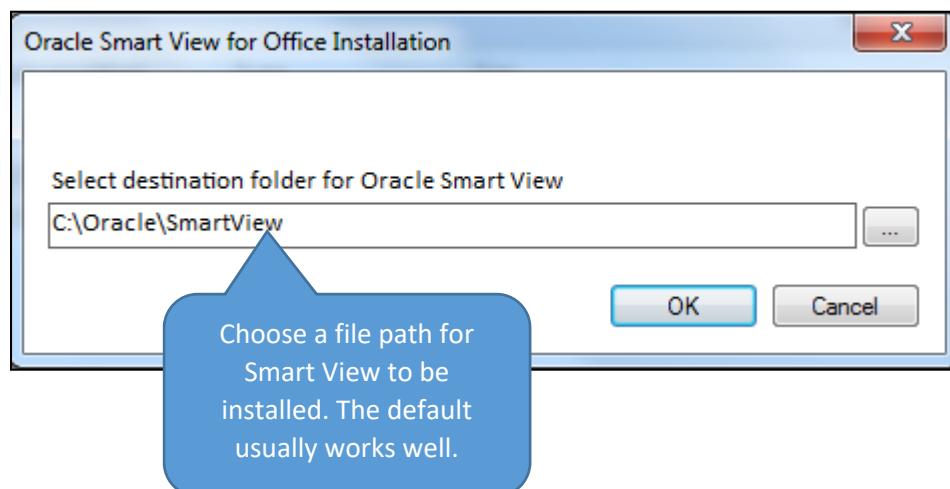
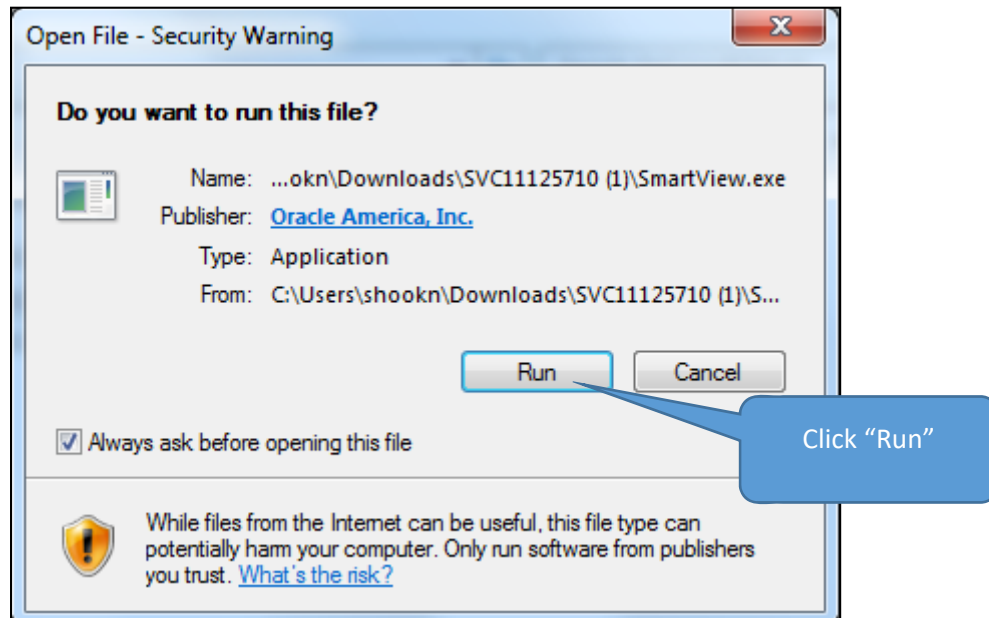
Select a destination to unzip the files. (Suggestion: create a new folder so the files are easier to find.) Check "Show extracted files when complete" and click **Extract**.

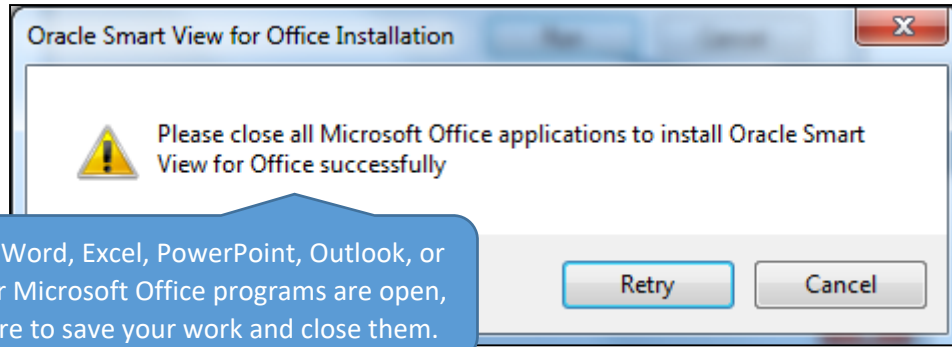


9. Once extracted, the folder should open automatically. Find the executable file named "Smart View.exe" and double click it to install.



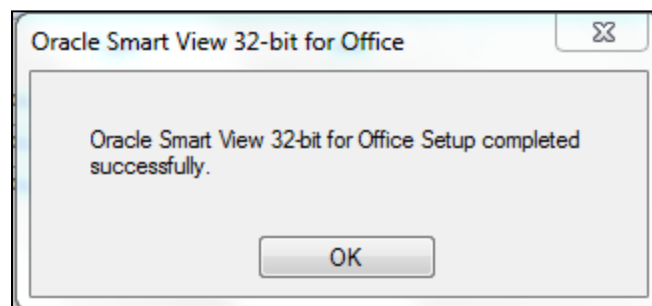
10. Right click the SmartView.exe file and select "run as Administrator", and follow the prompts.



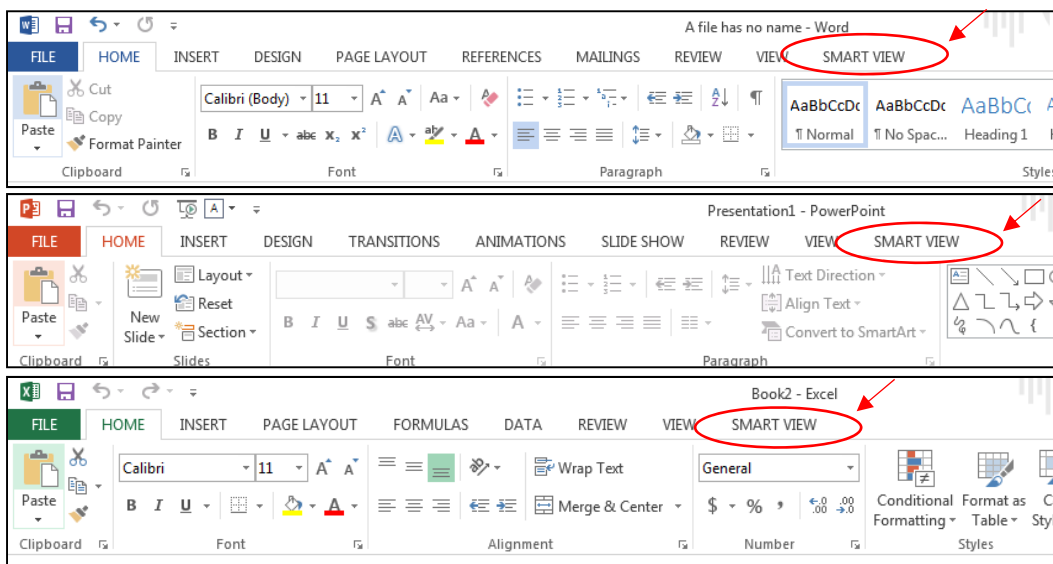


If Skype, Word, Excel, PowerPoint, Outlook, or any other Microsoft Office programs are open, make sure to save your work and close them.

11. An alert indicates when Smart View has been installed successfully.



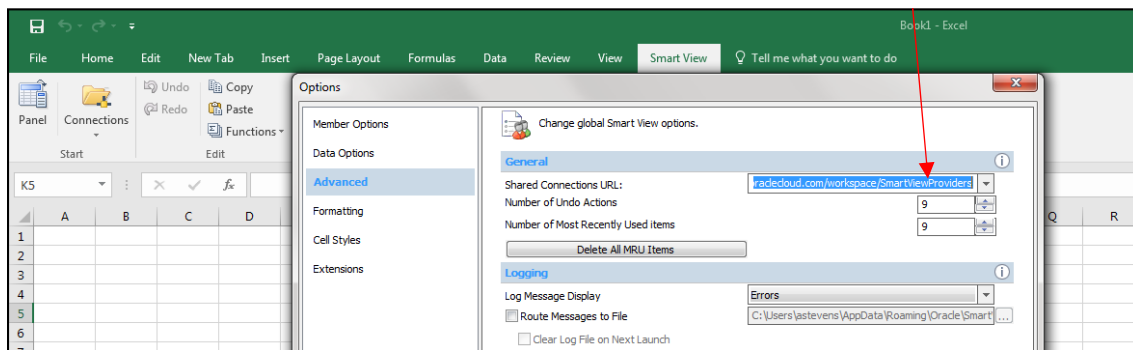
12. Open Word, PowerPoint, and Excel to ensure "Smart View" appears in the ribbon across the top of the applications. (Note: For some users, the first Office application that is launched post installation will hang up and stay on the load screen. If this occurs, simply hit the X on the loading window and reopen the program.)



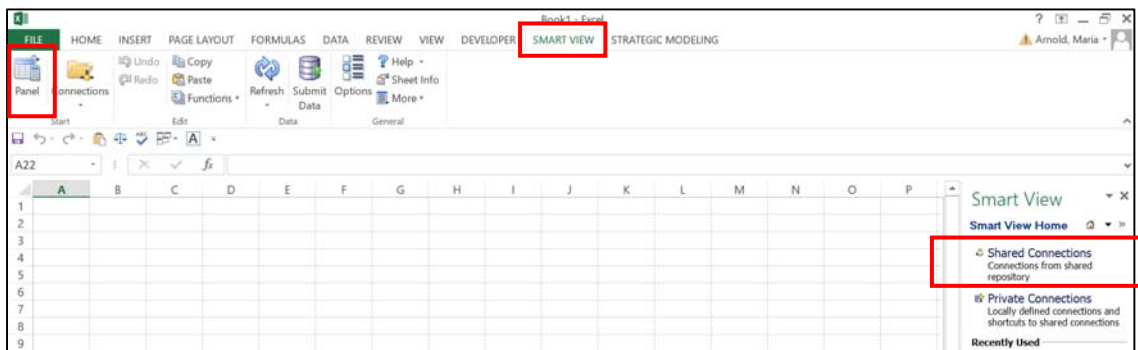
Smart View setup and log in

After installation, users establish a connection to the database and can select different options in order to optimize their experience.

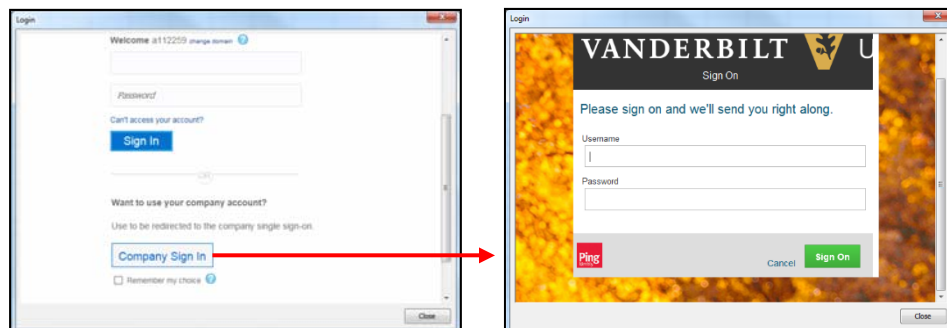
1. The first time connecting to Planning & Budgeting Cloud via the Smart View add-in in Excel, users will need to enter the relevant server address. Select the **Smart View** tab in the ribbon, choose **Options**, and then **Advanced**. Enter the following URL into the "Shared Connections URL" field: <https://planning-a112259.pbc.com/workspace/SmartViewProviders>.



2. Select the **Smart View** tab along the menu bar in Excel. Choose **Panel**, then **Shared Connections** to pull up the log in screen.



3. Select **Company Sign In** and enter your VUNet ID and password



4. Installation and setup is complete. You are ready for PBCS Smart View training!