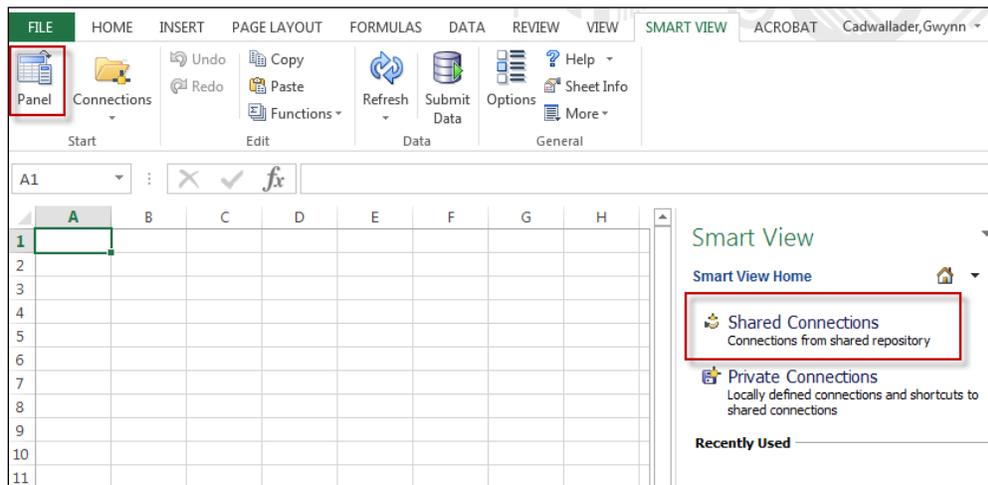## Smart View: Connecting to UF Hyperion Budgeting

To begin using Smart View check first to see if it is installed by opening excel and looking for the Smart View tab. To install Smart View contact your IT department.

1. Open excel and select the Smart View tab.

2. From the Smart View tab, select the **Panel** button.

3. In the Smart View Panel, click **Shared Connections**.



4. Once you have entered your GatorLink Username and Password, click the **Connect** button.

5. Select **Oracle® Hyperion Planning, Fusion Edition** from the drop down menu.
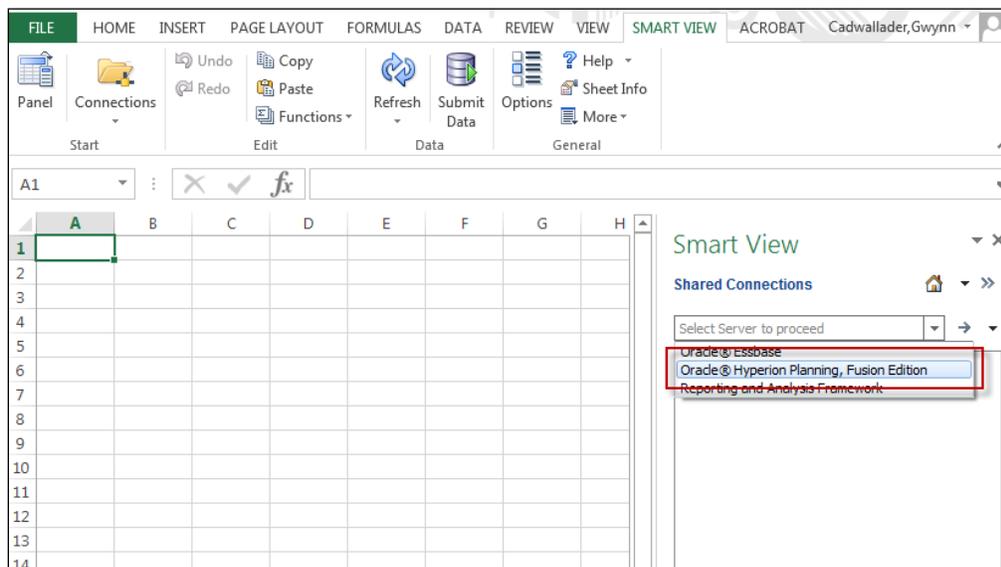
6. Click the **+** sign to expand the **prd4-budget-erp.ufl.edu** instance, if not already expanded.

7. Click the **+** sign to open the **UBO_PSPB** folder.

8. Click the **+** sign again to open the **Forms** folder.

9. Click the **+** sign next to **All Funds Budget** folder.

10. Double click the **Budget Worksheet**.
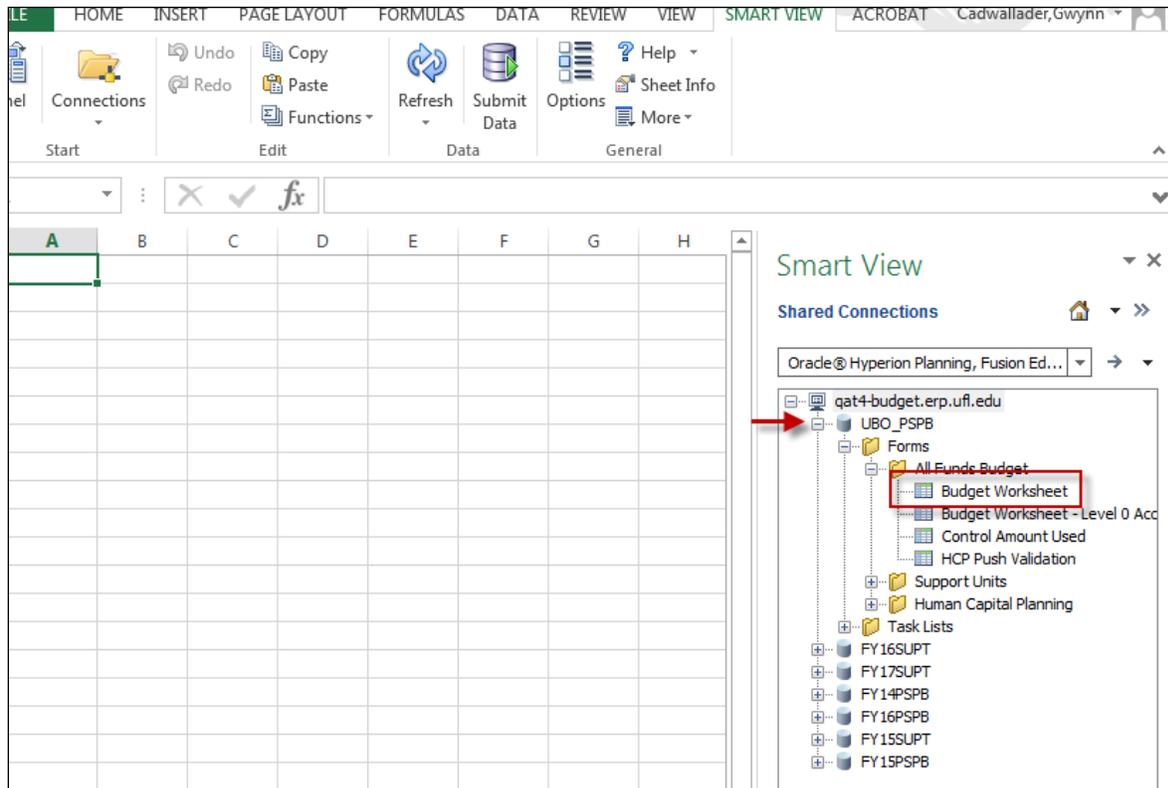


11. Your budget will populate the spreadsheet.

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If you need help with…
• Technical issues, contact the UF Help Desk:
  - 392-HELP
  - helpdesk@ufl.edu

• Policies and Directives, contact the UF Budget Office at (352) 392-2402 or http://cfo.ufl.edu/administrative-units/budget/

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