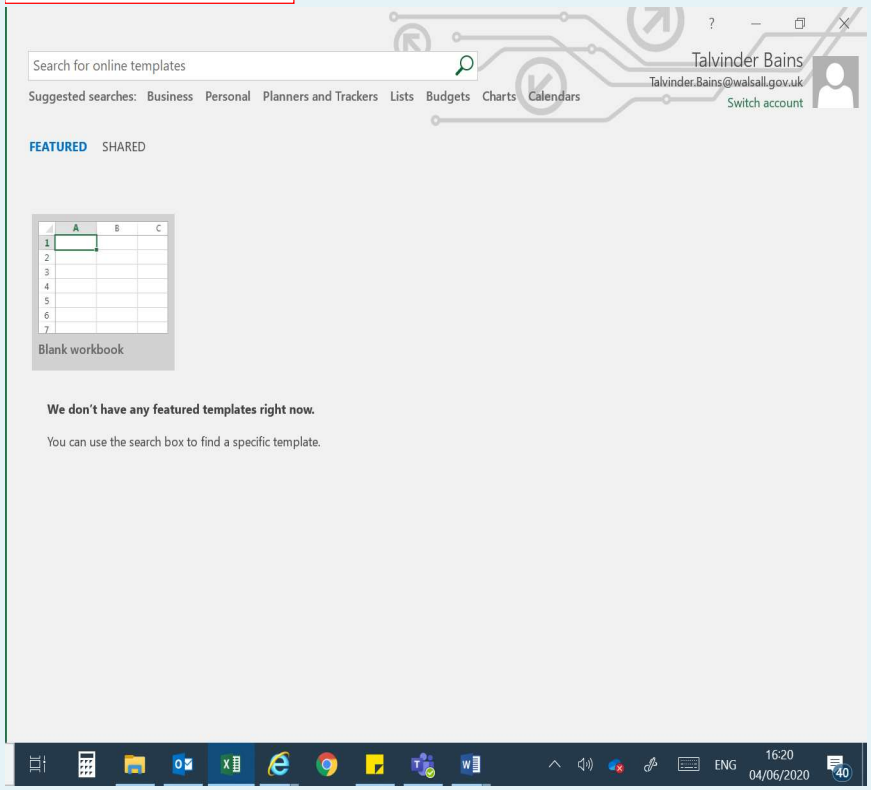
Smart View Log In

1

Smart View log in & SSO

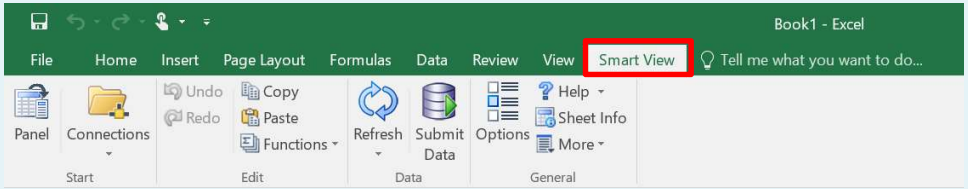
1.

- Close down all Excel files you may have open. Make sure you have saved your work before closing.
- **Open Excel** and select **Blank Workbook.**

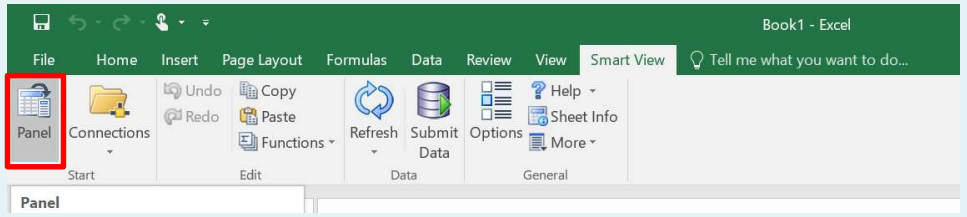


2

2. Once the new workbook is loaded, select **Smart View** tab in the ribbon located at the top of the screen.

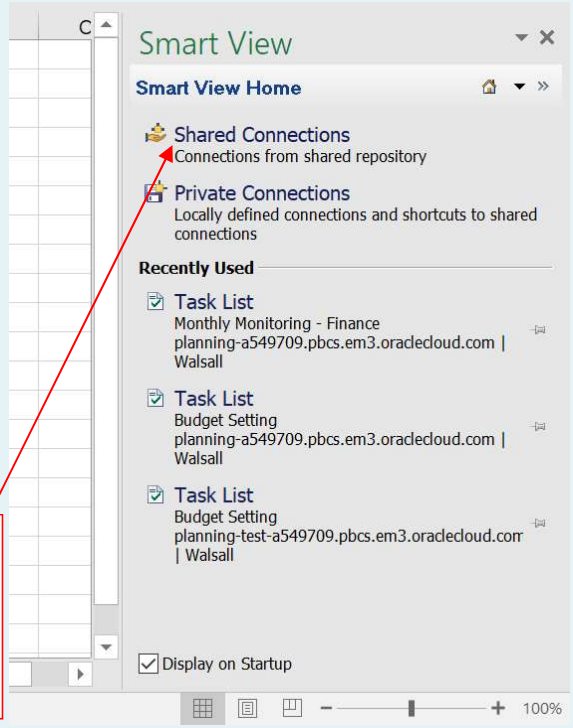


3. Click **Panel.**



Smart View Log In

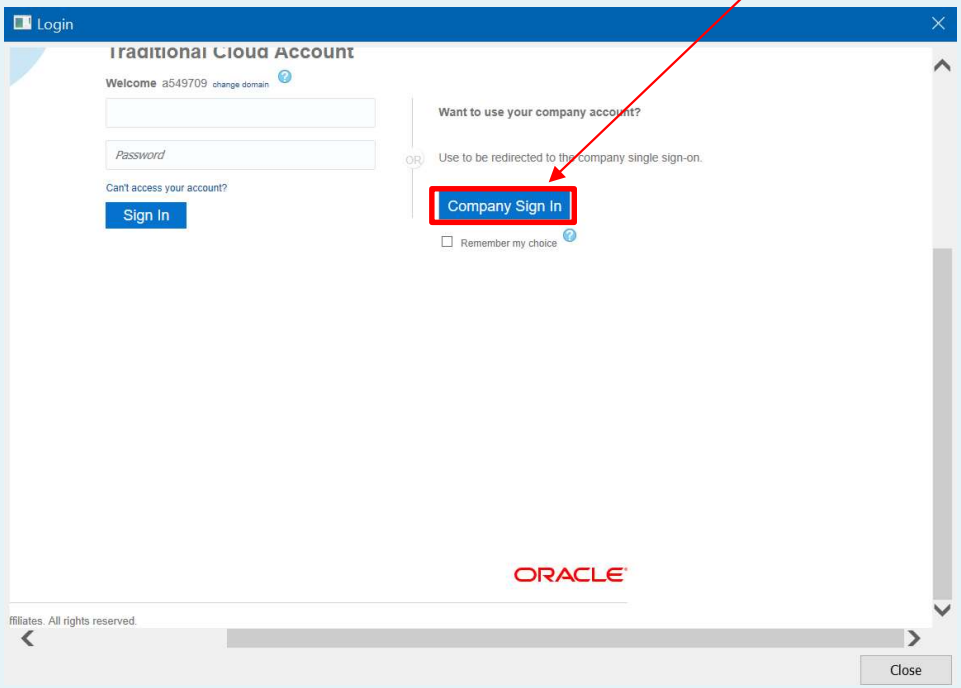
3



- **Panel** will load up Smart view Home on the right hand side of the Workbook.
- To **Sign in** select **Shared Connections**

4

4. A pop up will appear asking for login details, always click on **Company Sign In**



You will then be signed into the PBCS

Smart View Log In

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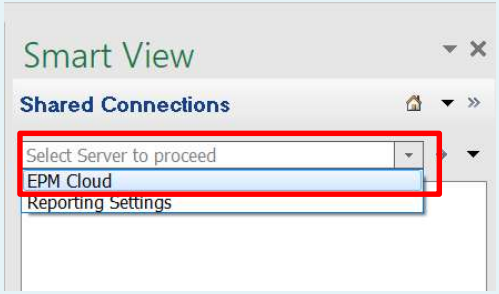
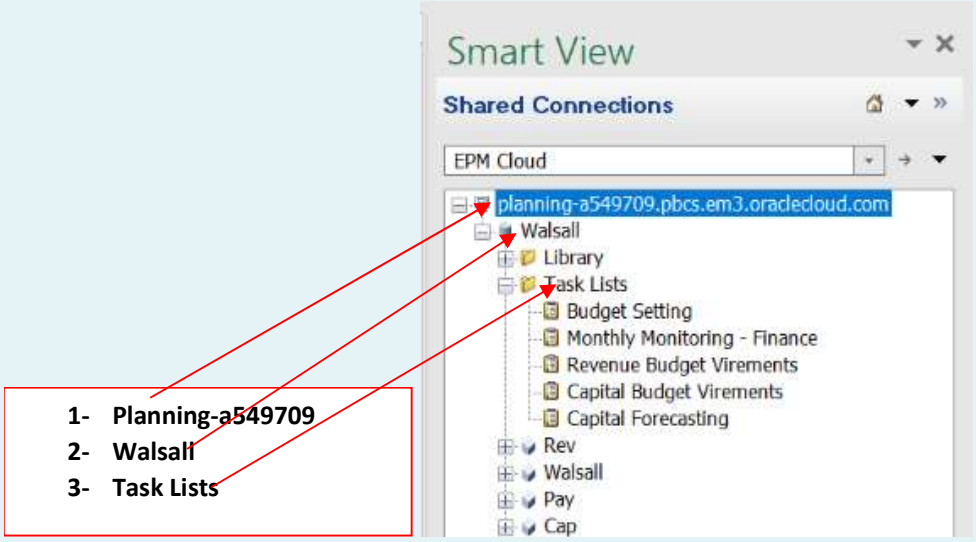
5. To get to the task list menu, click on the **drop down box** next to **Select Server to Proceed** and select **'EPM Cloud'**



6. Once you have connected to the cloud network expand in each of the links shown below by clicking the **[+]** next to it



6

7. Select the area you want i.e. Budget setting and click into the form you want to work on.

Further Support If you have any further queries, please contact the **One Source helpdesk** on **01922 654320.**