Oracle® Smart View for Office

Readme

Release 11.1.2.5.800

E96965-04

September 2018

Smart View 11.1.2.5.800 Readme

Related Topics

- Purpose
- · New Features in This Release
- Installation Information
- Supported Platforms
- Supported Languages
- · Supported Paths to this Release
- Backward Compatibility
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- Known Issues
- · Tips and Troubleshooting
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Purpose

This document includes important, late-breaking information about this release of Oracle Smart View for Office. Review this Readme thoroughly before installing Smart View.

New Features in This Release

Related Topics

- About the New Features in this Release
- New Essbase Expense Type Option
- Enable Attribute Association Processing in Ad Hoc Grids
- Support for MDX Calculations for Aggregate Storage Databases
- New View Properties Button in Oracle BI EE Ribbon



- Enhanced Move Formatting Behavior
- Perform a Health Check On Your System
- Oracle Enterprise Performance Reporting Cloud 18.08 Features
- Oracle Enterprise Performance Reporting Cloud 18.09 Features

About the New Features in this Release

This section includes new features in Release 11.1.2.5.800. To review the list of new features from earlier releases, use the Cumulative Feature Overview tool. This tool enables you to identify the products you own and your current implementation release. With a single click, the tool quickly produces a customized report of new feature descriptions. This tool is available here:

https://apexapps.oracle.com/pls/apex/f?p=20620:1:0

New Essbase Expense Type Option

For Oracle Essbase and Oracle Analytics Cloud - Essbase ad hoc grids, a new data option called **Use Expense Type** inverts the signage (positive to negative or negative to positive) for data in columns related to revenue, liability, and owner's equity accounts. This option is supported for aggregate storage databases only.

The **Use Expense Type** option is for use on ad hoc grids only and is not supported on grids containing Oracle Smart View for Office functions.

Locate the **Use Expense Type** option on the **Data Options** tab of the **Options** dialog box.

To use this option, ensure that your administrator has set up your application to display expense type signage.

Enable Attribute Association Processing in Ad Hoc Grids

Use the **Enable Varying Attributes** option to allow Essbase cells at intersections associated with attributes to display, where applicable, the value you specify for the **#Invalid/Meaningless** option.

The attribute intersection cells that are called out when you select **Enable Varying Attributes** have no association with the base dimension. In some cases, these cells may be varying attributes.

By default, the **Enable Varying Attributes** option is cleared. When cleared, the data values of attribute cells having no association to the base dimension are displayed as <code>#Missing</code>, instead of displaying the value specified in <code>#Invalid/Meaningless</code>.



Note:

When the **Enable Varying Attributes** option is selected, ad hoc query performance may be slower.

For example, suppose you create an ad hoc grid showing sales in bottles for all products in the Product dimension. For Cola and Diet Cola, bottles are not available, but bottles are available for all the other products in the Product dimension. In this case, the attribute Bottle has no association with Cola or Diet Cola.

With the **Enable Varying Attributes** option selected, cells for Cola and Diet Cola sales in bottles would display #Invalid by default. Or, you could define your own label for these cells.

Clear the **Enable Varying Attributes** option, and cells at those same intersections, where the attribute is not associated with the base dimension, would display as <code>#Missing</code>. In this case, you do not know which attribute cells are actually missing data, and which attribute cells have no association with the base dimension and, therefore, would never contain data.

The **Enable Varying Attributes** option and the **#Invalid/Meaningless** option are both located in the **Options** dialog, **Data Options** tab. By default, the **Enable Varying Attributes** option is cleared.

For more information, see Enabling Attribute Association Processing in Ad Hoc Grids in the *Oracle Smart View for Office User's Guide*.

Note that in previous editions of the 11.1.2.5.800 readme, this topic was entitled "Display Varying Attributes in Ad Hoc Grids." In previous editions of the 11.1.2.5.800 User's Guide, this topic was entitled, "Enabling Varying Attributes in Ad Hoc Grids."

Support for MDX Calculations for Aggregate Storage Databases

In Oracle Smart View for Office, you can now use an MDX-based calculation script to calculate an aggregate storage database in Oracle Analytics Cloud - Essbase.

New View Properties Button in Oracle BI EE Ribbon

This release introduces the new **View Properties** button in the Oracle BI EE ribbon. Select a table or chart view inserted in an Office document and view information about the view. You also have the option of refreshing or replacing the view.

The View Properties dialog contains general information such as:

- · Connection URL, catalog path, view source, and view name
- Display style: table or chart
- Date and time the view was last refreshed
- Prompts set at the analysis level
- Page prompts



Use the refresh options to refresh data in the view, or replace the view in the Office document with the current version in Oracle Business Intelligence Enterprise Edition or Oracle Analytics Cloud.

Enhanced Move Formatting Behavior

23629701 -- Since **Move Formatting on Operations** may affect performance on zoom operations, this Oracle Smart View for Office formatting option is now always disabled by default, letting you decide when to enable it. You enable it for each Smart View session, and for each sheet in a workbook.

More details on this new behavior are in the "Formatting Options" topic in the *Oracle Smart View for Office User's Guide*.

Perform a Health Check On Your System

You can perform a "health check" on your system to optimize performance and to get information about your machine, Microsoft Office version, Smart View version, and the extensions you have installed.

The following information is display only:

- Version Information—Operating System, Excel Version, Smart View Version
- Hardware Information—RAM Memory, Processor, Smart View Installed Drive Space
- Excel Add-ins—Depends on the Excel add-ins that are installed
- COM Add-ins—Depends on the COM add-ins that are installed

The following information can be changed:

- Registry Information
 - KeepAlive Timeout
 - Receive Timeout
 - ServerInfo Timeout
- Smart View Options
 - Undo Buffer
 - Improve Metadata Storage
- Graphic Setting
 - Disable Windows Transitions on Addin Task Panes
 - Disable Animations

For more information, see "Performing a Health Check On Your System" in the *Oracle Smart View for Office User's Guide*.

Oracle Enterprise Performance Reporting Cloud 18.08 Features



Related Topics

- Enhanced Doclet Support in PDF-based Report Packages
- Support for Adding TOC-type Doclets to Word-based Report Packages
- Improved Variable Panel Display in Smart View

Enhanced Doclet Support in PDF-based Report Packages

PDF-based report packages now support Excel- and Word-based regular doclets as well as Word-based Table of Contents doclets.

- Excel-based Regular Doclets
- Word-based Regular Doclets and TOC-type Doclets

Excel-based Regular Doclets

You can now add Excel files as regular doclets in PDF-based report packages. They can be added from Oracle Smart View for Office either during report package creation or after.

When you add an Excel file to an existing PDF-based report package as a regular doclet, you have the option of selecting specific worksheets to include in the report package or including all sheets in the workbook.

For Excel regular doclets, only worksheets and chart sheets are valid choices for inclusion in a report package. Hidden sheets, macro sheets, and dialog sheets are not valid choices for sheet selection. A message notifies you if a workbook contains only these types of sheets.

Other notable features of Excel-based doclets in PDF report packages:

- Variables can be sourced from and inserted into Excel regular doclets and Excel reference doclets
- Excel regular doclets do not follow a style sample document, and the Upload File dialog is not displayed during upload.

Word-based Regular Doclets and TOC-type Doclets

You can now add Word documents as regular doclets in PDF-based report packages. Word regular doclets in a PDF report package can be part of the authoring phase. You can embed content and insert variables into the Word regular doclets. In the Oracle Enterprise Performance Reporting Cloud web interface, Word regular doclets can be part of the review instance, along with the other PDF regular doclets. During review cycles, the review instance includes the Word regular doclet content. Commenting is allowed on the Word content using the Oracle Enterprise Performance Reporting Cloud web interface.

When adding a Word regular doclet to a PDF-based report package, you also have the option of designating the doclet as a Table of Contents, or TOC-type doclet. The Word document can contain the table of contents along with other Word content. Commenting is prohibited on the actual TOC, but comments are allowed on other



parts of the doclet, such as a the TOC heading. Regular doclets of TOC-type do not follow a style sample document, and the Upload File dialog is not displayed during upload.

Support for Adding TOC-type Doclets to Word-based Report Packages

In Oracle Smart View for Office, when adding a Word regular doclet to a Word-based report package, you now have the option of designating the doclet as a Table of Contents doclet. The Word document can contain a table of contents (TOC), along with other Word content. Commenting is prohibited on the actual TOC, but comments are allowed on the other content in the doclet, such as the TOC heading. Regular doclets that are designated as Table of Contents do not follow a style sample document, and the Upload File dialog is not displayed during upload.

Improved Variable Panel Display in Smart View

The load and display of the **Variables** panel is improved in report packages containing a large number of variables. The **Variables** panel now uses a paging mechanism, with 50 variables displayed per page. At the top of the **Variables** panel, use the left and right arrows or the page number drop-down to navigate the pages when more than 50 variables are present.

Oracle Enterprise Performance Reporting Cloud 18.09 Features

The Oracle Enterprise Performance Reporting Cloud extension for Oracle Smart View for Office is updated for 18.09 to fix several defects. The fixed defects are documented in the subtopic, Oracle Enterprise Performance Reporting Cloud, of *Defects Fixed in This Release*.

Installation Information

For information on Oracle Smart View for Office, including the link to downloading the latest Smart View release, refer to the My Oracle Support Knowledge Article "Smart View Support Matrix and Compatibility FAQ" (Doc ID 1923582.1). To access the Knowledge Article, you must have a user account with My Oracle Support (MOS).

As a best practice, Oracle recommends periodically checking for and downloading the latest Smart View release from the Knowledge Article, Doc ID 1923582.1, on MOS:

https://support.oracle.com



You can also download Smart View from Oracle Technology Network (OTN), http://www.oracle.com/technetwork/middleware/smart-view-for-office/overview/index.html. Before downloading, review the "OTN License Agreement" accessed from the Smart View download page to ensure that your usage is compliant.



Complete installation instructions are in the *Oracle Smart View for Office Installation* and *Configuration Guide*. This guide is available in the Smart View 11.1.2.5.800 library on the Oracle Help Center.

If you are using Google Chrome or Mozilla Firefox as your default browser, see the topics in Browser Support for information on downloading and installing the Smart View extension for those browsers.

https://docs.oracle.com/en/applications/?tab=8

Late-breaking information about the installation of Oracle Enterprise Performance Management System products is provided in the *Oracle Enterprise Performance Management System Installation and Configuration Readme*. Review this information thoroughly before installing EPM System products.

Supported Platforms

Related Topics

- About Supported Platforms
- Microsoft Windows 10 Operating System Support
- Microsoft .NET Framework Support
- Microsoft Office Support
- Microsoft Office 365 ProPlus Support
- · Windows, Office, and Smart View Locale Settings
- Browser Support
- Mobile Device Support
- Financial Management Journals Extension Support
- Oracle Analytics Cloud Support
- Oracle BI EE Support

About Supported Platforms

Information about system requirements and supported platforms for Oracle Enterprise Performance Management System products is available in spreadsheet format in the *Oracle Enterprise Performance Management System Certification Matrix*. This matrix is posted on the Oracle Fusion Middleware Supported System Configurations page on Oracle Technology Network (OTN):

http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html



Note:

Oracle Smart View for Office 11.1.2.5.800 follows the platform requirements which are stated in the 11.1.2.x version of the *Oracle Enterprise*Performance Management System Certification Matrix. The topics in this section list platforms supported by Smart View that are in addition to those listed in the matrix, or platform support introduced in this release.

Microsoft Windows 10 Operating System Support

Oracle Smart View for Office 11.1.2.5.520 was the first Smart View release to be supported on Windows 10. Earlier versions of Smart View are not supported on Windows 10.

Fixing Smart View Display and Operations Issues in Windows 10

After a Windows update on some high-resolution displays, drag-and-drop may not work as expected, some controls may look blurry, and some operations may not work properly. For example, an "Invalid selection" error occurs when trying to drag and drop members from the POV.

To avoid the "Invalid selection" error and other display issues after a Windows update:

- Select the Windows 10 Start button, then Settings, then System, then Display, and then Advanced scaling settings.
- Under Fix scaling for apps, set Let Windows try to fix apps so they are not blurry to On.
- Restart Excel.

Drag-and-drop and other operations should work as expected, and the display of Smart View controls should be improved.

Microsoft .NET Framework Support

To install and use Oracle Smart View for Office release 11.1.2.5.600+, Microsoft .NET Framework 4.5 or higher is required.

Microsoft Office Support

- Oracle Smart View for Office support for Microsoft Office 2016 began with the 11.1.2.5.520 release. Smart View versions earlier than 11.1.2.5.520 are not supported on Office 2016.
- Smart View works on locally-installed Windows versions of Office applications, including Office 365 Pro Plus 2016 installed using Click-to-Run. For more information, see the Knowledge Article entitled Oracle Hyperion Smart View Support for Office 365 (Doc ID 1581197.1):



Microsoft Office 365 ProPlus Support

28166721, 28185674, 28189177, 28190847, 28239708 -- A known issue with Microsoft Office 365 ProPlus patch 16.0.10228.20051, updated through the insider slow channel, prevents users from accessing Oracle Smart View for Office with Office 365, resulting in the "Member not found" message being displayed. This Microsoft patch was pushed to users who signed up for monthly channel updates between June 12 and June 14, 2018.

Workaround: Update Office with Microsoft Office 365 Version 1806 (Build 10228.20080), which contains the fix for this issue.

Windows, Office, and Smart View Locale Settings

18377748 -- On each Oracle Smart View for Office client machine, the following locale settings should match:

- Smart View language option
- Microsoft Office language
- Windows Regional Settings
- Windows operating system

Running Smart View in a language other than the language of the machine's Windows operating system, system locale, or Office language, may result in incorrect data being returned. For example, if the Windows operating system, system locale, and Office language are English, and you run Smart View in Russian, reports or chart data may display incorrectly.

Browser Support

Oracle Smart View for Office does not have a browser version dependency; however, it is possible that the products that Smart View works with do.

Check the *Oracle Enterprise Performance Management System Certification Matrix* and specific product readmes for any additional browser support requirements.

The matrix is posted on the Oracle Fusion Middleware Supported System Configurations page on OTN:

http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html

For Smart View-compatible Oracle Cloud products, check the *Getting Started with* Oracle Enterprise Performance Management Cloud for Users or Getting Started with Oracle Enterprise Performance Management Cloud for Administrators for any additional browser support requirements.



Microsoft Internet Explorer and Mozilla Firefox

Microsoft Internet Explorer and Mozilla Firefox are the only fully-supported browsers. For example, with Internet Explorer or Firefox, you may run a browser-based product, such as the Oracle Hyperion Planning web interface or Oracle Planning and Budgeting Cloud, and launch Oracle Smart View for Office directly from it. Conversely, you may perform drill-through in Smart View and launch a browser-based application in Internet Explorer or Firefox, such as Oracle Hyperion Financial Data Quality Management.

Mozilla Firefox

Using Firefox ESR 60 and Later with Smart View

To use Oracle Smart View for Office 11.1.2.5.800 with Mozilla Firefox ESR 60 and later, you must install the Oracle Smart View for Office web extension for Firefox.

You can get the extension by searching on "smartview" on the Firefox Add-ons download site or by going directly to this link:

https://addons.mozilla.org/en-US/firefox/addon/oracle-smart-view-for-office

Click the **+ Add to Firefox** button and follow the prompts to add the extension.

Google Chrome

Oracle Planning and Budgeting Cloud 17.06+ and Oracle Enterprise Planning and Budgeting Cloud 17.06+ support interoperability with Google Chrome and Oracle Smart View for Office 11.1.2.5.700+. In Oracle Planning and Budgeting Cloud or Oracle Enterprise Planning and Budgeting Cloud, you may select **Open In Smart View** to access the same data in Office. Conversely, you may launch Chrome from Smart View in order to access Oracle Planning and Budgeting Cloud or Oracle Enterprise Planning and Budgeting Cloud when performing drill-through operations.

To use Google Chrome with Smart View, install the Oracle Smart View for Office web extension from the Chrome Web Store. You can get the extension by searching on "smartview" in the Chrome Web Store or by going directly to this link:

https://chrome.google.com/webstore/detail/oracle-smart-view-for-off/cjbpfomjjhkmfkembnjejkhpihjnomne

Click the **+ Add to Chrome** button and follow the prompts to add the extension.

Mobile Device Support

Oracle Smart View for Office is supported on Microsoft Surface Pro tablets only. Smart View is not supported on any other tablet or smartphone.



Financial Management Journals Extension Support

The Oracle Journals for Financial Management extension works with Oracle Smart View for Office version 11.1.2.5.500 and later, and with Oracle Hyperion Financial Management 11.1.2.4.100 and later.

The Oracle Journals for Financial Management functionality introduced in Smart View 11.1.2.5.700 requires the following:

- Financial Management 11.1.2.4.204 with the 11.1.2.4.204 PSE 25575478
- Smart View 11.1.2.5.700+
- Oracle Journals for Financial Management extension 11.1.2.5.700+ (included with Smart View 11.1.2.5.700+)

Oracle Analytics Cloud Support

To use the Oracle Analytics Cloud-related features in Oracle Smart View for Office, you must have Oracle Analytics Cloud 17.3.2 or later.

Oracle BI EE Support

- To use the Oracle Business Intelligence Enterprise Edition-related features in Oracle Smart View for Office, you must have Oracle BI EE release 11.1.1.7.1 or any patches to the 11.1.1.7.1 release.
- Starting with Smart View 11.1.2.5.510, the Oracle BI EE per-user extension installer is included with the Smart View client installation.
 - The extension is installed the first time the user starts Office if the Oracle BI EE extension is not already installed and it is not disabled.
- 21888550 -- If you have installed Smart View 11.1.2.5.510 or later, and you want to go to a pre-11.1.2.5.510 version, you must first perform these steps to remove the Oracle BI EE extension installation:
 - 1. In the Smart View ribbon, go the **Options** dialog box, **Extensions** tab, and click the **Check for Updates, New Installs, and Uninstalls** link.
 - Locate the Oracle BI EE extension in the list, and clear the Enabled check hox
 - 3. Click Remove.
 - Close and restart Office to verify that the Oracle BI EE extension is removed from the list in the Extensions tab.
 - Close all Office applications.
 - 6. Uninstall Smart View from the Windows Control Panel.
 - After installing a pre-11.1.2.5.510 version of Smart View, go the Options dialog box, Extensions tab, to verify that the Oracle BI EE extension is enabled.



- 27148363 -- If you're using the Oracle BI EE extension, and upgrading from Smart View 11.1.2.5.500 or earlier to Smart View 11.1.2.5.510 or later, a complete uninstall of Smart View is required:
 - 1. Close all Office applications.
 - 2. Uninstall Smart View from the Windows Control Panel.
 - 3. Install Smart View.

See the instructions in "Installing from My Oracle Support or Oracle Technology Network" in the *Oracle Smart View for Office Installation and Configuration Guide*.

- To use the multiple connection and View Designer features described below, obtain the Oracle BI EE 11.1.1.7.140527 patch. Go to My Oracle Support,
 Patches & Updates tab, and search by "Product or Family." In the Product field, select Oracle Business Intelligence Enterprise Edition; in the Release field, select OBI EE 11.1.1.7.140527.
 - Multiple connections are supported with Oracle BI EE version 11.1.1.7.140527 and higher. If connecting to earlier versions of Oracle BI EE, then only one connection is allowed.
 - To use the Oracle BI EE View Designer feature (introduced in the 11.1.2.5.200 release), the Oracle BI EE 11.1.1.7.140527 patch or higher is required.

You should only use the View Designer in Smart View to edit views that were *created* and *inserted* using the View Designer.

See "Editing Views Created in View Designer" in the *Oracle Smart View for Office User's Guide* for more information.

Supported Languages

Information about supported languages for Oracle Enterprise Performance Management System products is available in spreadsheet format on the Translation Support tab in the *Oracle Enterprise Performance Management System Certification Matrix*. This matrix is posted on the Oracle Fusion Middleware Supported System Configurations page on OTN:

http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html



Unless otherwise stated in this readme, language support in Oracle Smart View for Office 11.1.2.5.800 follows that which is stated in the 11.1.2.x version of the *Oracle Enterprise Performance Management System Certification Matrix*.



Supported Paths to this Release

You can upgrade to Oracle Smart View for Office Release 11.1.2.5.800 from the following releases:

Table 1-1 Supported Paths to this Release

Supported Paths to this Release

Release Upgrade Path From	То
11.1.2.x	11.1.2.5.800



When upgrading from release 11.1.1.3.x and earlier, Oracle recommends uninstalling Smart View before installing release 11.1.2.5.800.

Backward Compatibility

Oracle Smart View for Office supports the Oracle Enterprise Performance Management System product versions listed in the Release Compatibility tabs in the *Oracle Enterprise Performance Management System Certification Matrix*. This matrix is posted on the Oracle Fusion Middleware Supported System Configurations page on OTN:

http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html

Defects Fixed in This Release

Related Topics

- About Defects Fixed in This Release
- General
- Essbase
- Financial Management
- Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud
- Oracle Enterprise Performance Reporting Cloud
- Oracle BI EE



About Defects Fixed in This Release

The topics in this section include defects fixed in Release 11.1.2.5.800. To review the list of defects fixed between earlier releases, use the Defects Fixed Finder This tool enables you to identify the products you own and your current implementation release. With a single click, the tool quickly produces a customized report of fixed-defect descriptions with their associated platforms and patch numbers. This tool is available here:

https://support.oracle.com/oip/faces/secure/km/DocumentDisplay.jspx?id=1292603.1

General

- 17215221 -- On Microsoft Surface Pro tablets, in the Task List pane, the text now displays correctly in the Action Panel and in Task Details. Items in these areas are no longer squeezed together vertically, and the fonts are not cut off at the bottom of each item.
- 26199400 -- The **Member Selection** dialog now displays correctly when launched from the French Canadian version of Oracle Smart View for Office.
- 27148137 -- After inserting several reporting objects into a PowerPoint
 presentation, then performing a Cascade Across and selecting members, and then
 attempting a Refresh All, entering slide show mode may cause the POV to
 disappear and PowerPoint to stop responding.
- 27679149 -- The Member Selection dialog box is now editable in 4K highresolution displays.

Essbase

- Bug 27405835 After inserting a chart and a POV into a PowerPoint slide, and then changing the POV, both objects are refreshed when performing a Refresh.
- 27431964, 28135613 -- In sheets with formulas, a refresh no longer removes formulas or changes the sheet composition.
- 27560276, 27730355 -- After a Refresh, member names defined by formulas are not moved or overwritten.
- 27875032 -- Formulas in an ad hoc grid are now not moved to other cells when the sheet is refreshed.
- 27566388 -- For MDX queries, you can now specify a non-default port number when required. In the Manage and Execute Queries dialog, click Modify Connection, and in the Edit Connection - Application and Cube page of the wizard, select the Advanced Setup check box. In Server, specify the server and non-default port number in this format:

```
<server_name>:<port_number>
```

Then specify the **Application** name and **Cube/Database** name, and click **Finish**. Toggle the **Change View** button in the **Manage and Execute Queries** to view the MDX gueries sorted server and non-default port number.



 28119650 -- Oracle Analytics Cloud - Essbase only. Excel no longer stops working while executing a calculation containing runtime prompts.

Financial Management

- 25902276 -- In Excel worksheets, users are now able to scroll using the mouse wheel after connecting to Oracle Hyperion Financial Management and opening a new worksheet.
- 27450351 -- In an Oracle Managed Cloud Service environment, users will no longer see the message, 'The XML page cannot be displayed', in the login screen when opening a saved workbook and logging in to Financial Management from Oracle Smart View for Office.
- 27524993 -- In an SSO environment with Oracle Access Manager, after successfully signing in to Financial Management in Smart View using a private connection, the Login window no longer becomes blank.
- 27738748 -- When opening a saved workbook that uses a private connection to Financial Management, the error message, 'Failed to instantiate Planning Offline Provider -%x', is no longer displayed and users are able to connect.

Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud

- 23265152 -- In an ad hoc grid that is based on a form that has Smart Lists, copying data cells and then pasting them no longer cause the pasted cell data to change from text to numeric.
- 25768064 -- In PowerPoint, the Document Content pane remains populated in the following scenario: Insert a chart and then, in the Document Contents pane, insert two reporting objects, a table and a POV. View the slide in slide show mode. Make a change to the POV and then exit slide show mode.
- 26885152 -- A Planning power user is now prompted when trying to save a Smart Form with the name of a form or Smart Form that already exists in Planning.
- 27272782 -- Formatting is no longer lost when refreshing an ad hoc sheet in a saved workbook.
- 27341510 -- In forms, after changing a member for the first time in the POV, the form and the POV retain the change.
- 27388571 -- In the Task list pane, rows no longer overlap.
- 27405666 -- After clearing the cell, you can now enter and submit the same value that was previously submitted.
- 27593442 There is no longer a lengthy delay in transferring members from the Member Selection to the worksheet.
- 27608935 -- When the #NoData/Missing Label option is set to #NumericZero, "0" is being properly displayed and does not reset to #Missing when switching between sheets.



- 27678819 -- When cascading, the special character, "/", used in a member name is dropped from the name of resulting sheets while keeping the rest of the member name intact for each applicable sheet name.
- 27995997 -- Erroneous formulas and figures are no longer added to blank cells after performing a Refresh.

Oracle Enterprise Performance Reporting Cloud

These defects are fixed in the 18.09 Oracle Enterprise Performance Reporting Cloud extension update.

- 28250175 -- In a PDF-based report package, when selecting Properties for a regular Excel doclet, the icon for the Selected Sheets tab is now the proper size.
- 28322419 -- In the Variables panel, keyboard shortcuts are implemented for navigating through the page forward and page back buttons and the page dropdown list as follows:
 - From the page back button, use **Tab** to move to the page forward button, and
 Tab again to move to the page drop-down list
 - From the page drop-down list, use Shift-Tab to move to the page forward button, and Shift-Tab again to move to the page back button
 - When focus is on the page back or page forward button, use the **Enter** key to move through the pages. When you arrive at the last available page, the button is disabled; for example, if scrolling through the pages with the page forward button, the button becomes disabled when you arrive at the last page of variables.
 - After using the Enter key to scroll through the pages using the page back or page forward button, use the space bar to select a page
- 28322461 -- In the **Variables** panel, keyboard shortcuts are implemented when the page drop-down menu has focus as follows:
 - Use the space bar to open the drop-down list
 - While the drop-down list is open, use the up and down arrow keys to move to a specific page
 - Use the space bar to select the highlighted page
- 28345443 -- In English and some non-English versions of Oracle Smart View for Office, in the Add Doclet to Report Package dialog, Selected Sheets tab, the All Sheets Included option label is no longer truncated.
- 28380311 -- In PDF-based report packages, the comments panel now correctly displays for Word doclets opened in Smart View.

Oracle BI EE

- 19724894 -- An exception no longer occurs when trying to insert a compound view after a session timeout. Instead, the login window reappears.
- 26530600 --Filtering now works correctly on Oracle Business Intelligence Enterprise Edition views inserted into Oracle Smart View for Office.



- 27079828 -- In some views, data did not display correctly in Smart View when the Excel option, **Scale for %**, was used.
- 27156242 -- The time (hour, minute, second) of the Oracle BI EE Now() function is now refreshed to the latest value after clicking Refresh in Smart View.
- 27799827 -- Smart View can now refresh views that have an ampersand, &, in the name.
- 27879475 -- An error no longer occurs when inserting a view with a value of "0%".
- 28003975 -- Deleting and then reinserting the same view no longer causes the table to shift or extra row and columns to be added to the view layout.
- 28063062 -- Smart View correctly inserts views when the view data contains two equals signs in succession (==).

Known Issues

Related Topics

- About Known Issues
- Installation
- General
- Disclosure Management
- Essbase
- Financial Management
- Financial Reporting
- Planning
- Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud
- Oracle Enterprise Performance Reporting Cloud
- Oracle BI EE

About Known Issues

The topics in this section contain the noteworthy known issues of this release.

Installation

25497882 -- On Windows 10, non-administrator users are not authorized to modify the Program Files folder. Therefore, if an administrator installs Oracle Smart View for Office in Program Files, a non-admin user will not be able to uninstall Smart View. By default, Smart View is installed in C:\Oracle\SmartView, not in the Program Files folder.



General

- 21607945 -- An invalid row height or column width error can occur when performing a Refresh All on certain workbooks.
- 21810748 -- In Excel, copying a sheet containing a POV or slider to another sheet in the workbook results in an error.
- 22548638 -- Oracle Smart View for Office does not refresh data when multiple workbooks are open.
- 23174312 -- If you are connected to Smart View and Microsoft PowerPivot at the same time, and then close Excel and reopen Excel, both the Smart View and PowerPivot ribbons are missing from Excel.

Workaround: Terminate the Excel process in Windows Task Manager, then reopen Excel.

- 26121342 -- Refreshing a multi-sheet workbook from the Refresh command in the Smart View ribbon is slower than refreshing using the VBA function, HypMenuVRefresh.
- 26922457 -- Cascading from a cascaded worksheet can result in an error if the any of the worksheets in the resulting cascade will have the same name as sheets already in the workbook.
- 27132649 -- On Windows 10, after installing Smart View and starting Excel for the first time, you are not able to select any other Excel ribbons or the Smart View ribbon, or select any menu items on the default Home ribbon.

Workaround: Click the **X** in the top right corner to close Excel, and then restart Excel. Now you should be able to select the Smart View ribbon and any other Excel ribbon.

- 27180743, 27180878 -- When the Strategic Modeling extension is enabled, the following issues can occur:
 - 27180743 -- You cannot perform a Smart View copy and paste of form data.
 - 27180878 -- If you have opened a form as an ad hoc grid, you cannot add any other sheets to the workbook.
- 28043563 -- In some cases, after selecting the Move Formatting on Operations
 option and then Save As Default on the first sheet, the option remains selected
 after inserting a new sheet in a workbook.

Disclosure Management

18347708 -- Disclosure Management 11.1.2.4.0.78 will always trigger the autodeployment process. To work around this issue, update the version number for Disclosure Management in the Oracle Smart View for Office UpdateList.xml file:

From: version="11.1.2.4.078"

To: version="11.1.2.4.0.78"



For information on modifying the <code>UpdateList.xml</code> file, see the Oracle Smart View for Office Installation and Configuration Guide, "Administering Extension Installations and Updates" chapter.

Essbase

- 11841013 -- You may not be able to change members in a Smart List.
- 22168018 -- Starting with Oracle Smart View for Office 11.1.2.5.520, when connected to duplicate member databases, the member name only should display by default in the Query Designer POV. However, even though the Member Name Only option is selected (in the Options dialog box, Member Options tab), the fully qualified member name is displayed in the Query Designer POV.

Workaround: To change the display of member names in the Query Designer POV, open the **Member Selection** dialog box from the Query Designer POV, then click **OK**.

Financial Management

17632970 -- In Oracle Smart View for Office 11.1.2.1.103, after submitting a cell
that has a pipe character (|) and caret (^), the submitting removes all pipe
characters and adds "c" after any caret.

Workaround: Do not create cell text with a caret or pipe character.

- 18861859 -- In Oracle Hyperion Financial Management forms, Member Selection dialog box, the selections available in the View and Filters options are not consistent with the selections available for the same form in the Financial Management web application.
- 21847984 -- In Oracle Journals, when the Region and Language settings are set
 to a European language such as Swedish, values are truncated and do not display
 correctly. When set to English, the values are truncated but can be expanded to
 display correctly. Values display correctly when the Region and Language settings
 are set to an Asian language, such as Japanese.
- 26548782 -- On forms opened in Smart View from the web application, some calculated and read-only cells can be edited without an error message being displayed, although the changed data cannot be submitted.
- 27474347 -- In some cases, when searching for an Entity dimension member in Member Selection, the Entity dimension is highlighted instead of the searched-for member.

Financial Reporting

 14600458 -- When exporting a Oracle Hyperion Financial Reporting report from Oracle Hyperion Enterprise Performance Management Workspace to Oracle Smart View for Office, the user POV for the report is not retained. The user POV defaults to the user POV used most recently in Smart View.



- 14643318 -- An "Invalid Pointer" error results during login when the data source connection has timed out and you attempt to refresh a previously-saved report that contains a function grid.
 - **Workaround:** Close the workbook and Excel. Then, restart Excel, open the workbook, and perform the refresh.
- 23201279 -- On Office 2016, when connected to Financial Reporting, Microsoft Word suspends or terminates unexpectedly after inserting several reporting objects in succession.

Planning

- 26083454 -- With the Use Excel Formatting option selected, and the Member Indentation option set to None, row members retain their indentation. The loss of indentation applies only to column members. Note that the Indentation option applies only to ad hoc sheets; it does not apply to forms.
- 26197214 -- Forms open much more slowly in Office 2016 compared to Office 2010.

Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud

- 23191769 -- When connected to Reporting Settings and selecting the Import document as query ready option in Oracle Smart View for Office, the Oracle Hyperion Financial Reporting report opens without the standard functionality available.
- 26083454 -- With the Use Excel Formatting option selected, and the Member Indentation option set to None, row members retain their indentation. The loss of indentation applies only to column members. Note that the Indentation option applies only to ad hoc sheets; it does not apply to forms.
- 26524052 -- Starting in Smart View 11.1.2.5.701, forms open more slowly in Office 2016 than in previous Office versions.
- 27008788 -- The Use Double-click for Operations options works for ad hoc sheets, but not for forms.
- 27396796 -- In some cases, when no alias table is selected, refreshing the sheet and then zooming in on a dimension causes leading zeroes to be removed from member names, causing the member to be treated as a comment instead of a member.
- 27610299 -- When the POV is not set in the form layout in Planning, a "no valid rows of data" error occurs when trying to per ad hoc analysis in Smart View.

Oracle Enterprise Performance Reporting Cloud

28407122 -- In Oracle Smart View for Office, when adding a new doclet and assigning authors to it, in certain cases, more users than expected may get assigned as authors. For example, you intend to assign user1 as the author, but user11 and user12 are also added.



Workaround: Manually remove the incorrect assigned users by editing the doclet properties in the Oracle Enterprise Performance Reporting Cloud web interface.

Oracle BI EE

- 18477887 -- Due to a known Microsoft Office issue, when one or more charts are inserted in Word or PowerPoint 2010 (32-bit), the Excel instance that is launched in the background does not always close after refresh.
- 19717930 -- Clicking **OK** in the View Designer after the session is timed out returns an object reference error.
- 20669893 -- A date prompt that was created with user input set to text and the default value set to SQL that shows the current date results in the current_date SQL being shown in the prompt and not the actual current date.

Tips and Troubleshooting

Tips and troubleshooting topics are listed in the "Tips and Troubleshooting" chapter of the Oracle Smart View for Office Installation and Configuration Guide.

All Oracle Smart View for Office 11.1.2.5.800 guides are available in the library on the Oracle Help Center:

https://docs.oracle.com/en/applications/?tab=8

Documentation Updates

Related Topics

- Accessing EPM System Product Documentation
- Copying and Pasting Code Snippets from PDFs
- Limited Chart Copy and Paste Support
- Changes to Financial Management Formulas in Smart View
- Office AutoCorrect Affecting Member Editing in Planning Admin Extension
- Working with VBA Functions in Oracle Planning and Budgeting Cloud and Oracle Analytics Cloud - Essbase Applications
- Preserving Excel Formulas Outside of Essbase Ad Hoc Grids

Accessing EPM System Product Documentation

Find the latest Oracle Enterprise Performance Management System product guides in the Oracle Help Center (https://docs.oracle.com/en/). To access documents to view or download, click the Applications icon. In the Applications Documentation window, select the Enterprise Performance Management tab, and then look for your release in the Enterprise Performance Management list.

For Oracle Enterprise Performance Management Cloud documentation and videos, go to the Cloud Documentation, Software as a Service (SaaS) page in the Oracle Help



Center (https://docs.oracle.com/en/cloud/saas/index.htm), and then click the link for your service in the Enterprise Performance Management list..

You can also find deployment-related documentation on the Oracle Technology Network (http://www.oracle.com/technetwork/index.html) and on the Oracle Software Delivery Cloud website (http://edelivery.oracle.com/EPD/WelcomePage/get_form).

Copying and Pasting Code Snippets from PDFs

When you cut and paste code snippets from a PDF file, some characters can be lost during the paste operation, making the code snippet invalid.

Workaround: Cut and paste from the HTML version of the document.

Limited Chart Copy and Paste Support

16451759 -- Chart copy and paste is only supported for Oracle Business Intelligence Enterprise Edition charts. Charts based on other providers, such as Oracle Hyperion Financial Management, do not paste correctly.

Changes to Financial Management Formulas in Smart View

21882424 -- After Oracle Hyperion Financial Management 11.1.2.2.xxx, the custom dimensions in Financial Management applications are referred to as alias names in Oracle Smart View for Office formulas. The recent versions of Smart View can no longer interpret the formulas. Formulas in the old format in saved workbooks will not work. The dimension identifiers will, therefore, need to be updated for each formula to reflect the new alias names for the custom dimensions.

Office AutoCorrect Affecting Member Editing in Planning Admin Extension

23206737 -- When editing member properties in the Planning Admin Extension, member names, member descriptions, aliases, or member formulas of the data type Text, to retain two initial capital letters in a name (for example, DGreen) and not have Excel autocorrect to one initial capital (for example, Dgreen), set the following option:

In Excel, access the **Excel Options** dialog box, then select **Proofing**, then **AutoCorrect Options**, and clear the **Correct Two Initial Capitals** check box.

Working with VBA Functions in Oracle Planning and Budgeting Cloud and Oracle Analytics Cloud - Essbase Applications

In most cases, VBA functions are supported in Oracle Planning and Budgeting Cloud and Oracle Analytics Cloud - Essbase.

Connection Functions



For cloud sources, you must use HypUIConnect. HypConnect is not supported.

HypUIConnect() *always* prompts for authentication where the user must provide the user name, password, and domain to log in. This is required for login to cloud services.

Other Functions

Oracle Planning and Budgeting Cloud: In general, functions supported by Oracle Hyperion Planning are also supported by Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning and Budgeting Cloud. Functions supported by Oracle Planning and Budgeting Cloud are noted in the *Oracle Smart View for Office Developer's Guide*.

Oracle Analytics Cloud - Essbase: In general, functions supported by Oracle Essbase are also supported by Oracle Analytics Cloud - Essbase. This is *not* noted in the *Oracle Smart View for Office Developer's Guide*. The guide will be updated to reflect Oracle Analytics Cloud - Essbase support in a future monthly update.

Preserving Excel Formulas Outside of Essbase Ad Hoc Grids

For smoother functioning of Oracle Essbase ad hoc analysis when formulas are present outside of the grid, Oracle recommends that you add a simple comment in any blank cell of the last column. The formula will be retained when you refresh the grid. The formula will be lost on pivots and undo.



Ensure that you have selected the **Preserve Formulas and Comments in ad hoc operations (except pivot and undo)** option in the **Options** dialog, **Member Options** tab.

In the example below, a formula is added to cell E4, outside of the grid. In order to preserve this formula during refreshes, a comment should be added to a blank cell in column E. In the example, the word "comment" is added to cell E1.

The comment is needed especially if you are performing an active ad hoc analysis. This helps Essbase and Oracle Smart View for Office to keep the content lying outside the grid intact during refresh and other ad hoc operations such as Zoom In and Zoom. Out or Keep Only and Remove Only. Without the comment, you may lose the formulas outside the grid when performing these ad hoc operations.

Oracle® Smart View for Office Readme E96965-04

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