



ORACLE® SMART VIEW FOR OFFICE

Release 11.1.2.5.610

Readme

ORACLE®

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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

Subtopics

- [New VBA Functions](#)
- [Planning and Budgeting Cloud Service Features](#)
- [Enterprise Performance Reporting Cloud Features](#)
- [Locating New Features Information for Past Releases](#)

New VBA Functions

Several new VBA functions are introduced in this release. At this time, these functions are supported by Oracle Essbase only.

- **HypCreateRangeGrid** enables users to refresh multiple selected or named ranges of cells in a multiple-grid worksheet. You can also use it to add a grid in the selected range if there is not already a grid in the particular location, thus creating a multiple-grid sheet. If the ranges specified for this function contain more rows or columns than the actual grid has, the additional rows and columns are treated as comments and are thus part of the grid.
- **HypSubmitSelectedRangeWithoutRefresh** updates the database with data, as is, from the selected data range; it ignores cells outside the selected range and does not overwrite (or refresh) them. The selected range does not automatically get refreshed after submit; the user must manually refresh the grid to retrieve the updated data. For a successful submit, the user must select a range which constitutes a valid grid.

This function requires Oracle Hyperion Provider Services release 11.1.2.4.13.

- **HypSubmitSelectedDataCells** allows the selected data cells to be submitted. For free-form grids, this VBA function allows selected blank cells to be submitted as #Missing.

These VBA functions are described in detail in the *Oracle Smart View for Office Developer's Guide*.

Planning and Budgeting Cloud Service Features

Subtopics

- [Drop-down Member Selection on Row Dimensions in Forms](#)
- [Change in Accessing the User Preferences Dialog Box](#)

Drop-down Member Selection on Row Dimensions in Forms

In forms, Planning administrators and form designers can set up easy-to-use drop-down member selectors on row dimensions. When these drop-down selectors are enabled, the form users can directly select a member from the drop-down list on the row dimension in the form. The drop-down member selector also allows users to add data to member rows that may have otherwise been suppressed.

For the Smart View user, keep in mind the following:

- There is no visual notification as to which members have drop-downs enabled; you must click a dimension cell and, if a down arrow appears next to the cell, then there is a drop-down list enabled.
- The drop-down content (list of members) is controlled by the form definition for the corresponding segment.
- Selections are not retained. The drop-down selection will be lost on refresh. If you perform a Refresh after selecting a member from the drop-down, the selection is lost and the form returns to its original state.
- The drop-down selection will be lost on saving data. Modifying data cells and saving the Excel worksheet will not retain modified drop-down selections.

To use this feature in Smart View requires configuration in the Form Designer in the Planning web interface. The Planning administrator or form designer specifies the drop-down selectors as segment properties for particular dimensions. For example, suppose there are two dimensions placed on row axes, Entities and Line item; the member selector drop-down may be enabled for the Entity dimension members, for the Line item dimension members, or for both. Configuration is described in *Administering Planning for Oracle Planning and Budgeting Cloud*.

Change in Accessing the User Preferences Dialog Box

This release changes the way you access the **User Preferences** dialog box from the Smart View Panel. Instead of accessing the dialog box from the plan level, you access **User Preferences** from the application level.

Additionally, you will no longer be prompted to select a plan type. Instead, the preferences you set will apply to all plan types.

Enterprise Performance Reporting Cloud Features

Subtopics

- [Support for Embedding Management Report Content](#)
- [Remap Report Content within a Reference Doclet or File](#)
- [Revert to Prior Doclet Version](#)
- [Review Comparison](#)

To use the features described in the following sections, the 16.12 version of the Oracle Enterprise Performance Reporting Cloud extension for Smart View is required.

Support for Embedding Management Report Content

In the same way that you embed report content from reference doclets and files, you can now embed content from Management Reporting-based reports using Smart View.

You create a Management Report, insert it as a reference doclet, and define available content using the Enterprise Performance Reporting Cloud web interface. Then, from Smart View, you embed that content as needed in report package doclets.

In the *Oracle Smart View for Office User's Guide*, see the topics in “Working with Embedded Content from Reference Doclets,”

Remap Report Content within a Reference Doclet or File

From Smart View, you can now remap existing available content to different report content within a reference doclet or reference file.

You may find that the available content within an Excel-based reference doclet or reference file needs to be remapped to different report content within the doclet source. This may occur if the doclet source you were using was updated or the report content you were using was renamed or deleted. Or, this may be required if you notice that the wrong report content was selected.

In the *Oracle Smart View for Office User's Guide*, see “Updating Excel-based Reference Doclet Content” and “Remapping Content within Reference Files.”

Revert to Prior Doclet Version

As a doclet author, you can now easily restore the contents of a doclet back to a prior version if needed.

In the *Oracle Smart View for Office User's Guide*, see “Reverting to a Prior Version of a Doclet.”

Review Comparison

As a reviewer, you can now focus your subsequent reviews of a report to only the areas of the report where content has been updated. You can easily navigate through the changes and focus your review on the content of the report that has changed. In the web, change indicators are

displayed in the report to represent where changes were made. To see detailed changes that were made to the report, the system will generate a Microsoft Word comparison document using Oracle Smart View for Office.

In the *Oracle Smart View for Office User's Guide*, see “Comparing Review Instances.”

Locating New Features Information for Past Releases

- For Smart View Release 11.1.2.5.600, see the *Oracle Smart View for Office New Features* available in the Smart View 11.1.2.5.600 library available on the Oracle Help Center.
<https://docs.oracle.com/en/applications/?tab=8>
- For new features relating to Oracle Enterprise Performance Management System installation, architecture, and deployment changes in this release, see “New Features in this Release” in the *Oracle Enterprise Performance Management System Readme*.
- Use the Cumulative Feature Overview tool to review the list of new features added between earlier releases for Smart View and other EPM System products. This tool enables you to identify your current products, your current release version, and your target implementation release version. With a single click, the tool quickly produces a customized set of high-level descriptions of the product features developed between your current and target releases. This tool is available here:

<https://support.oracle.com/oip/faces/secure/km/DocumentDisplay.jspx?id=1092114.1>

Installation Information

For information on Smart View, 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>

Note: 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 Installation and Configuration Guide*. This guide is available in the Smart View 11.1.2.5.610 library on the Oracle Help Center.

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

Late-breaking information about the installation of EPM 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

Subtopics

- [Microsoft Windows Operating System Support](#)
- [Microsoft .NET Framework Support](#)
- [Microsoft Office Support](#)
- [Windows, Office, and Smart View Locale Settings](#)
- [Browser Support](#)
- [Mobile Device Support](#)
- [Financial Management Journals Extension Support](#)
- [Oracle BI EE Support](#)

Information about system requirements and supported platforms for EPM 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: Smart View 11.1.2.5.610 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 Operating System Support

Smart View 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.

Microsoft .NET Framework Support

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

Microsoft Office Support

- Smart View 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)*:

<https://support.oracle.com/epmos/faces/DocumentDisplay?id=1581197.1>

Windows, Office, and Smart View Locale Settings

18377748 -- On each Smart View 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

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

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 Smart View 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.

Note: Smart View release 11.1.2.5.600+ is supported on Firefox 45+ ESR. Smart View versions earlier than 11.1.2.5.600 are not supported on Firefox 45+ ESR.

If you are using Firefox 45+ ESR, then you must uninstall Smart View before installing release 11.1.2.5.600+. Do not perform an upgrade or install over the existing release.

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>

Mobile Device Support

Smart View 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 Smart View version 11.1.2.5.500 and later, and with Oracle Hyperion Financial Management 11.1.2.4.100 and later.

Oracle BI EE Support

- To use the Oracle Business Intelligence Enterprise Edition-related features in Smart View, 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.
 2. Locate the Oracle BI EE extension in the list, and clear the **Enabled** check box.
 3. Click **Remove**.
 4. Close and restart Office to verify that the Oracle BI EE extension is removed from the list in the **Extensions** tab.
 5. Close all Office applications.
 6. Uninstall Smart View from the Windows Control Panel.
 7. 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.
- 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 EPM 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>

Note: Unless otherwise stated in this readme, language support in Smart View 11.1.2.5.610 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 Smart View Release 11.1.2.5.610 from the following releases:

Table 1 Supported Paths to this Release

Release Upgrade Path From	To
11.1.2.x	11.1.2.5.610

Note: When upgrading from release 11.1.1.3.x and earlier, Oracle recommends uninstalling Smart View before installing release 11.1.2.5.610.

Backward Compatibility

Smart View supports the EPM 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

Subtopics

- [General](#)
- [Essbase](#)
- [Financial Management](#)
- [Oracle BI EE](#)
- [Planning](#)

This section includes defects fixed in Release 11.1.2.5.610. 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

- 22527046 -- The Smart View extension for Firefox 45.x is now signed and enabled.
- 22971427, 23331602 -- A new VBA function, HypSubmitSelectedRangeWithoutRefresh, handles the case where the data in a selected grid area is submitted without refreshing other data on the sheet. See [“New VBA Functions” on page 2](#) for a short description of this new function. See the *Oracle Smart View for Office Developer's Guide* for more information.
- 23283873 -- Color-based Excel filters were not reapplied after refreshing the sheet.
- 23544063 -- An “Array index out of bounds” error occurred when using the Office 2013 Share functionality (File, then Share, then Email, and then Send As Attachment command).
- 23745106 -- Users were prompted to select a certificate every time they accessed a Smart View data source connection, an application, or a database. See bug 23745106 in [“Tips and Troubleshooting” on page 22](#) for more information.
- 24577946 -- The HypConnect parameter for sheet name is no longer case sensitive.

Essbase

- 19181853, 19335608 -- Excel memory use no longer increases with each Refresh operation on function-only worksheets and certain ad hoc reports.
- 22836659 -- Using Ctrl-C and Ctrl-V, Excel would freeze or slow down when copying and pasting cells over previously copied and pasted cells.
- 23064686 -- When printing POV members in the header or footer in Excel, once a sheet or form is printed, any further POV changes will not be reflected in the next printing of that sheet or form during the same Excel session.
- 23071874 -- A new VBA function, HypCreateRangeGrid, was created to resolve issues with retrieving data on to multiple-grid worksheets.

- 23152199 -- The Smart View Submit Data command did not submit blank cells.

Two new VBA functions, HypSubmitSelectedDataCells and HypSubmitSelectedRangeWithoutRefresh, were created to work with blank cells:

- HypSubmitSelectedDataCells() allows the selected data cells to be submitted. For free-form grids, this VBA function allows selected blank cells to be submitted as #Missing.
- HypSubmitSelectedRangeWithoutRefresh() updates the database with data, as is, from the selected data range; it ignores cells outside the selected range and does not overwrite (or refresh) them.

See the *Oracle Smart View for Office Developer's Guide* for more information on these functions.

- 23179363 -- Smart View performance was slower when zooming in on members with formulas. To work around this, HypGetOption and HypSetOption introduce a new constant, HSV_MOVEESSBASEMEMBERFORMULAONZOOM. See the *Oracle Smart View for Office Developer's Guide* for more information.
- 23285702 -- Selecting multiple members and then performing a zoom operation results in an error.
This fix requires Oracle Hyperion Provider Services version 11.1.2.4.013 or later.
- 23301523 -- The selected member was not retained in the POV after refresh. Instead, the member reverted back to the dimension name.
- 23523215 -- Ad hoc retrievals were slow when working with there were member formulas on the sheet.
- 23541731 -- When there was a pipe character (|) in a member name, running the VB function HypGetMemberInformation returned the member name with a ^P instead of a pipe, |, in the Member Information dialog box.
- 23584280 -- HypRetrieveRange was generating an additional grid name after each logout. To fix this, HypRetrieveRange will no longer create a multiple-grid sheet, but just refresh the selected range without adding any new name range or grid. To create a multiple-grid sheet, use HypCreateRangeGrid.
- Bug 23595318 -- Excel suspended or was very slow when Smart View was enabled.
- 23622933 -- When setting the active connection in the Smart View Panel, the Essbase ribbon was not immediately visible.
- 23638616 -- When using Data Perspective, no warning message was shown when the specified limit was exceeded.
- 24382528 -- With the **Preserve Formulas and Comments in ad hoc operations** option cleared, member formulas were not removed after refresh.
- 24429437 -- Text and formulas outside of the grid were cleared when changing from an ad hoc sheet to a multiple-grid sheet.
- 24447692 -- In Smart View, member selection lookup tags were not working in the calculation scripts.

Financial Management

- 24411205 -- An error no longer occurs when performing a Refresh All on a workbook containing a protected sheet.
- 24623603 -- Microsoft Excel sheets went into protected mode when users try to drill into Financial Management journals from the Entity Details page in Smart View.

Oracle BI EE

- 23487892 -- The date format in inserted views, such as table and chart views, was not displaying as expected, even with the “Use Excel Formatting” option selected.
- 23544443 -- Formatting and layout of inserted views was changed after a refresh.
- 23645697, 23731139 -- An error occurred when inserting a table view with a numeric prompt.
- 24574656 -- When importing an Oracle BI EE report to Word using Smart View, an empty row was inserted between the view header and the data.

Planning

- 23310835 -- Submit did not work when submitting data in a cell that is referenced in a formula.
- 23606313 -- In Smart View, users were unable to add or delete columns or rows, and retain formulas.
- 23633151 -- In forms, parent member cells displayed as input cells. Note that for cells to display correctly, Microsoft .NET 4.5 or higher is required on the machine that is running Smart View. This requirement is noted in [“Microsoft .NET Framework Support” on page 6](#).
- 24299511 -- A Smart View refresh sometimes changed Smart List values to their Essbase IDs.

Known Issues

Subtopics

- [General](#)
- [Disclosure Management](#)
- [Enterprise Performance Reporting Cloud](#)
- [Essbase](#)
- [Financial Management](#)
- [Financial Reporting](#)
- [Reporting and Analysis](#)
- [Oracle BI EE](#)
- [Planning](#)
- [Reporting and Analysis](#)

The following are the noteworthy known issues of this release.

General

- 11934177, 12569072, 18057207 -- Smart View does not support Excel's **Transition navigation keys** option. Due to a Microsoft limitation, many of the Microsoft APIs that Smart View depends on for both Smart View and Excel functionality do not work when the **Transition navigation keys** option is enabled. For more information on this issue, see “Transition Navigation Keys Not Supported” in the *Oracle Smart View for Office Installation and Configuration Guide*, “Tips and Troubleshooting” chapter.
- 13987451 -- When working with larger workbooks, or performing an operation that results in a large data set, a “not enough resources” error may occur.

Workarounds:

- Break up your workbook into smaller workbooks.
- Upgrading to Office 64-bit may resolve the issue.
- 14456134 -- Various issues may arise when the Excel option, **Ignore other applications that use Dynamic Data Exchange (DDE)**, is selected. For example, there are problems launching Excel, launching Excel files from outside of Excel, and using the **Export in Query Ready Mode** option from a browser to export balances from Oracle Hyperion Financial Reporting.
Workaround: Click the Microsoft Office Button (upper left corner of Excel), and then click **Excel Options**. In the **Advanced** category, scroll down to the **General** options, and then clear the **Ignore other applications that use Dynamic Data Exchange (DDE)** check box. Restart Excel.
- 16554169 -- On computers where Smart View is installed, an error occurs when updating links in PowerPoint that were copied from Excel to PowerPoint.
- 16835531 -- Smart View does not support number formatting of Function Grids imported from Smart Slices.
- 17164523 -- The selected POV members are reverted to dimension members after deleting some columns and refreshing the spreadsheet.

Workaround: Click the POV button to hide the POV toolbar. Then ensure that you do not delete the column that contains the Page members.

- 17215221 -- On Microsoft Surface Pro tablets, in the Task List pane, the text does not display correctly in the Action Panel and in Task Details. Items in these areas are squeezed together vertically, causing the fonts to be cut off at the bottom of each item.
- 18115776 -- When extensions are enabled in Smart View, cascading a report with a large number of members can cause Excel to stop responding.

Workaround: From the Smart View Options dialog box, Extensions page, disable any extensions that are installed. Restart Excel and repeat the cascade operation.

- 21355132, 21691927 -- Copying a Smart List or Text List cell and pasting it over three or more cells causes Excel to stop responding.

Workaround: Oracle recommends that you install the Office 2013 update noted in Microsoft KB 3115455:

<https://support.microsoft.com/en-us/kb/3115455>

- 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.
- 21820253 -- In some cases, in workbooks with multiple sheets where each sheet contains a different query or template, if you drag the POV toolbar to the top of a sheet and dock it, you may see two POV toolbars on that sheet. This can occur on any number of sheets where the POV toolbar has been docked.

Workaround: Click the X in the right corner of one of the POV toolbars to close it, or refresh the sheet.

- 21850033 -- In PowerPoint, you can duplicate a slide containing a POV or slider, but importing the metadata results in an error.
- 22280411 -- There are compatibility issues between Oracle Hyperion Disclosure Management and Smart View, causing Smart View to terminate unexpectedly on right-clicks.
- 23001707 -- When calling the Smart View API from the HypRetrieveAllWorkbooks() VBA function, other Excel events (for example, worksheet_activate) are triggered, causing the program to run incorrectly and impacting performance for each API call.

Workaround: Disable Smart View extensions before running the HypRetrieveAllWorkbooks() function.

- 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.

Disclosure Management

- 14275486 -- When Disclosure Management doclets are combined into master documents, table autofit formatting may be lost.
- 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 Smart View `UpdateList.xml` file:

From: `version="11.1.2.4.078"`

To: `version="11.1.2.4.0.78"`

For information on modifying the `UpdateList.xml` file, see the *Oracle Smart View for Office Installation and Configuration Guide*, “Administering Extension Installations and Updates” chapter.

Enterprise Performance Reporting Cloud

- 24825354 -- If using Firefox as your web browser to launch Smart View and Firefox opens a browser tab in with an unresolved URL of `oraclesv:\`, enable the extension for Smart View from the Extensions tab of Firefox Add-ons Manager and restart Firefox.
- See the *Oracle Enterprise Performance Reporting Cloud Release Readiness* document in your service environment for Oracle Enterprise Performance Reporting Cloud known issues, including those related to Smart View.

Essbase

- 18076474 -- Formulas are not retained on the worksheet after performing an **Undo** and then a **Redo**.
- 11841013 -- You may not be able to change members in a Smart List.
- 12913962 -- When you associate a connection to an ad hoc worksheet using **Set Active Connection**, members may disappear from the worksheet when you refresh.

Workaround: Instead of associating a connection, perform direct ad hoc analysis on the worksheet.

- 13854982 -- When filtering on attributes at the Generation 3 level in an attribute dimension, Smart View only displays members up to the Generation 2 level.
- 14470264 -- The `HsGetVariable` function does not support non-ASCII variable values.
- 16607593 -- When executing an MDX query with a calculated member (`WITH MEMBER...`) in Excel, the calculated values appear successfully, but, if the grid is refreshed, then the column is converted to a comment column and all calculated values are lost.

This occurs whether you are using the **Execute MDX** command in the **Essbase** ribbon, or the VBA function, `HypMDXExecute`.

- 18480728 -- In multiple-grid sheets, submitting data values '0 and &nd does not work properly when the **#No Data/Missing Label** is set to '0 or &nd.

- 19190415 -- When the POV toolbar is displayed, an error is returned upon refresh.
- 19930163 -- In the following environment: Windows 8.1, 32-bit with Office 2013, 32-bit, while performing ad hoc operations, Excel may become unresponsive to right-clicks within the sheet; for example, when attempting to pivot using drag-and-drop.
- 22159359 -- Starting with Smart View 11.1.2.5.520, when connected to duplicate member databases, the member name only should display by default in the POV. However, for workbooks saved in Smart View 11.1.2.5.510 and earlier, the qualified member name displays in the POV.

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

- 22168018 -- Starting with Smart View 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**.

- 23056595 -- Smart View has issues processing numeric member names when connected to Oracle Essbase.

Workarounds:

- Prefix numeric member names with an apostrophe (').
- Before entering numeric member names, select the member cells or an entire column, then use Excel to set the format of the selected cells to “Text”.
- If you have already entered numeric member names, select the member cells or an entire column, use Excel to set the format of the selected cells to “Text”, then press **F2** and **Enter** to trigger Excel to update the cell type.

Financial Management

- 17632970 -- In Smart View 11.1.2.1.103, after submitting a cell that has 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.

- 17591100 -- Member search does not work on forms that contain the Add Member button.
- 18252228 -- In Financial Management ad hoc grids, when connecting by performing a refresh, the **Smart Slice** and **Cascade** commands are grayed out in the **HFM Ad Hoc** ribbon.
- 18512314 -- When using **Find Next** in the **Member Selection** dialog box, the first member that matches the search criteria is located, but clicking **Find Next** again does not locate any other relevant members.

- 18861859 -- In 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.
- 19827684 -- When working with Financial Management ad hoc, and copying and pasting cells from Excel to Word, formatting is not retained even though the **Use Excel Formatting** option is selected.
- 20726025 -- In Windows 8x versions, if the **Member Name Display** option is set to “Member Name and Description,” you may get an “Invalid members” error when trying to save a journal. This can be the result of the size of the Excel window onscreen.

Workaround: Try unfreezing panes in Excel using the **View**, then **Freeze Panes**, and then **Unfreeze Panes** command. Also, you may reduce the display size to 75% or 50% before opening or creating the journal.

- 21158205, 21438712 -- In **Entity Details**, the **View, Rows** functionality is not available in Smart View.

When working correctly, this functionality would be accessed from the drop-down menu when you click **View**, then **Rows** in the **Entity Details** dialog box (as described in “Selecting Rows for the Report” in the *Oracle Smart View for Office User's Guide*).

You can use select and view rows from the Financial Management web interface. This functionality will be fully supported in a later version of Financial Management.

- 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.

Financial Reporting

- 14600458 -- When exporting a Financial Reporting report from Oracle Hyperion Enterprise Performance Management Workspace to Smart View, 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.

- 19827684 -- Formatting is not retained when copying and pasting cells from Excel to Word.
- 23201279 -- On Office 2016, when connected to Financial Reporting, Microsoft Word suspends or terminates unexpectedly after inserting several reporting objects in succession.
- 22330209 -- On Windows 10 with Office 2016 64-bit, you cannot launch Financial Reporting reports when Internet Explorer is running in protected mode.

Workaround:

1. In Internet Explorer, go to **Internet Options**, then **Security**, and then **Trusted sites**.
2. Click **Sites**, and add the Financial Reporting URL to the list of trusted sites.
3. Verify that the **Enable Protected Mode** check box is cleared.

Reporting and Analysis

19664468 -- Starting with release 11.1.2.5.400, importing an Oracle Hyperion Interactive Reporting document in Smart View and clicking **Next** in the **Import Workspace Document** wizard results in a blank wizard window, with no error information provided.

Oracle BI EE

- 14345387 -- Smart View does not support direct insert of stepped and curved line charts. When inserting a stepped or curved line chart, Smart View will substitute the closest match, a default line chart. This is expected behavior.
- 14355587 -- Selection lists specified for prompts in Oracle Business Intelligence Answers (radio button lists and check box lists) are converted to list controls in Smart View. This is expected behavior.
- 14563557 -- Checking or clearing the “Use unified scale” option in BI Answers requires that you use the “Replace View” option when refreshing in Smart View. This is expected behavior.

For information on setting refresh preferences, see “Specifying Preferences for Refreshing Views” in the “Smart View and Oracle BI EE” chapter of the *Oracle Smart View for Office User's Guide*.

- 14580332 -- Time zone preferences set in Oracle BI EE account preferences are not exposed in Smart View.
- 14600296 -- In the Prompt Selector, there is a limit of 256 items that can be displayed in drop-down list controls or option lists.

Workaround: Increase the value of the setting in Prompts/MaxDropDownValues in `instance.config` in BI Answers.

- 14737958, 14750088 -- In View Designer, you cannot create a view with a column of numeric type on the Page or Section edges.
- 15840478 -- Pie charts are not refreshed after adding a filter in BI Answers if the filter added is on a dimension that defines the number of pies that display.

Workaround: If there is a change in a filter column that is also defined as a number-of-pies dimension, then you should change the refresh option on the chart view to **Replace View**, and then perform another refresh. This ensures a correct refresh, updating the number of pies and the chart titles that correctly reflect the new data.

See “Specifying Preferences for Refreshing Views” in the *Oracle Smart View for Office User's Guide* for instructions.

- 15840538 -- Pie charts are not refreshed after removing a filter in BI Answers if the filter removed is on a dimension that defines the number of pies that display.

Workaround: See the workaround specified for bug 15840478.

- 15886617 -- The precision of digits that Smart View can display in Excel is limited to the precision of digits allowed by Excel.

For example, the following is an 18-digit number formatted with two decimal places:

123456789123456789.12

Because of Excel's 15-digit precision limitation, the digits after the 15th digit are changed to zeroes in Excel and the number would be displayed as follows:

123456789123456000.00

- 15969695 -- On Office 2007, a memory error occurs when inserting a chart into PowerPoint.

Workaround: Install Microsoft Office 2007 Service Pack 3.

- 16373849 -- When inserting multiple objects from a compound view into PowerPoint and selecting the “one object per slide” option, an Excel instance is opened for each object and then minimized in the Windows Taskbar. However, when the insert operation is complete, the Excel instances are not automatically closed. This can clutter the Taskbar when inserting a large number of objects.

Workaround: To minimize the number of Excel instances shown in the Taskbar, click the Office button (in the upper left corner of Excel), select **Excel Options**, and then select the **Advanced** tab. In **Display** options, clear the **Show all windows in the Taskbar** check box.

- 16055532 -- When pivot tables that contain embedded pivot charts are inserted into Smart View, the embedded pivot charts are not imported.

Workarounds: You can either use Excel to create a pivot chart based on an inserted Excel pivot table or use BI Answers to create a new chart view and insert that view using Smart View.

- To create a pivot chart based on the inserted native Excel pivot table, complete these steps:
 1. In Smart View, click in the Excel pivot table and select the Excel **Options** ribbon.
 2. From the **Tools** group, click the **PivotChart** button.
 3. In **Insert Chart**, select a chart style and then click **OK**.
- To create and insert a separate chart view:
 1. In Oracle Business Intelligence Answers, create a new, separate chart view object.
 2. In the Office application, use Smart View to insert the newly-created chart view.

In both workarounds, the pivot chart is rendered.

- 16285804 -- If a prompt is defined on double columns, and the prompt operator selected is *** Prompt User**, the following operators do not work at runtime:
 - is less than
 - is less than or equal to
 - is greater than

- is greater than or equal to
- is like
- is not like

Workaround: Do not use the * **Prompt User** operator. Instead, define the operator explicitly at design time, using one of the operators listed above. The operators will then work.

- 16520355 -- In Word and PowerPoint, there can be some overlapping of tables and charts when inserting a compound view or when a compound view is either inserted from the catalog or copied and pasted. This is especially true when any of the objects in the compound view are particularly large.
- 19717930 -- Clicking **OK** in the View Designer after the session is timed out returns an object reference error.
- 19724894 -- An exception occurs when trying to insert a compound view after a session timeout.
- 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.
- 21977076 -- Note the following behaviors involving connection to the Oracle BI EE server:
 - When attempting to connect from Smart View to Oracle BI EE while the Oracle BI EE server is down, an error message is displayed. However, after clicking OK in the error message, the **Connect to Data Source** dialog box is erroneously displayed. Click **Cancel** to close the dialog box.
 - When trying to insert a view after a connection timeout has occurred, the **Connect to Data Source** dialog box is displayed. If you click **Cancel**, the dialog box is relaunched. Click **Cancel** and the error message is displayed.

Planning

- 6533549, 6549255 -- If a member cell contains a formula that calculates the value for a summary time period, that cell should be locked, but instead, Smart View may mark it as dirty if the data for the member is modified.
- 14834659 -- When substitution variables are used, the last column (the right-most column) on Oracle Hyperion Web Analysis forms is dropped or hidden when the form is opened in Smart View.
- 16721734 -- In specifying a **Replacement** option as `#NumericZero` (**Options** dialog box, **Data Options** tab), and then spreading data for Time Periods, the parent data could not be deleted.

Workaround: Ensure that the **Replacement** option, **Submit zero**, is selected when `#NumericZero` is also selected.

- 16898574 -- Some style preferences set on forms from within Planning are not honored on forms in Smart View.

- 17926504 -- Ad hoc analysis started from a saved Planning grid will inherit the formatting options saved as part of the grid.

To use Smart View Cell Styles or the Use Excel Formatting option for an ad hoc grid generated from a saved grid, complete the following steps:

1. Open the saved Planning grid as a form.
 2. In the Planning ribbon, **Formatting** group, select **Apply**, and then **None**.
 3. Click **Save** to save the form back to the Planning server.
 4. Now use the saved form to perform ad hoc analysis.
- 18421689 -- In Smart View, the display order of business rules attached to a form differs from the display order in Oracle Hyperion Planning.
 - 19016350 -- Smart Forms do not support constants (integers or numbers) in calculated cells.

Workaround: Use a formula format, such as ="Text " or =10 for grid labels consisting of constants.

- 19439940 -- When using the FVSCHEDULE function in Smart Forms, use cell references to existing data, rather than arrays of data.

For example, use:

```
=FVSCHEDULE (C10, B15:B17)
```

Do not use:

```
=FVSCHEDULE (C10, {0.09, 0.11, 0.1})
```

- 19685022 -- Number formatting is not retained when copying data points from Excel to Word or PowerPoint.
- 19843672 -- In Planning forms, when working with user variables, selecting a substitution variable as a value of a user variable is not supported.
- 20794274 -- Locking the Year Total cell and copying the distributed period values on months with alternative hierarchy results in an incorrect distribution.
- 20938289 -- When two forms are on two separate worksheets, the rule variable on one form changed to the default after refreshing the page dimension on the other form, causing the business rule to invoke an incorrect value for a runtime prompt variable.
- 21345664 -- In Smart View, the currency symbol in a cell is displayed differently from the Planning web interface when the Planning option, "Allow multiple currencies per entity," is set to true.
- 21567487 -- Indentation of dimensions in a Planning form is displayed incorrectly.
- 24813003 -- While connected to an ad hoc sheet from Smart View 11.1.2.5.610 with 16.10 Oracle Planning and Budgeting Cloud, a provider error occurs when attempting to expand members in the Member Selection dialog accessed from the User Variables tab of the User Preferences dialog box.

Workaround: Invoke User Preferences at the application level before invoking ad hoc.

Reporting and Analysis

- 6575786 -- **Refresh** and **Refresh All** do not work if two pages of a Oracle Hyperion Web Analysis report are imported sequentially.

Workaround: Use All Pages to import multiple pages of a report.

- 6908330 -- Oracle Hyperion Reporting and Analysis documents are not displayed in Import Workspace Document Folder Tree if EPM Workspace is under WebSeal and configured for a context path (`http://<server>:<port>/<context path>/workspace`) other than the default (`http://<server>:<port>/workspace`).
- 7674839 -- When you import a Financial Reporting report into Smart View and refresh, the worksheet becomes solid black, except for the cells imported from Financial Reporting.

Workaround: From the Excel Tools menu, select Options. On the Color tab, click Reset and then OK.

- 9160243 -- These issues exist with dashboards imported as images from Smart View into Excel, Word, and PowerPoint:
 - The image sizes differ from the images in Oracle Hyperion Enterprise Performance Management Workspace.
 - There is an excess of background space around the images.

Workaround: In some cases, you may be able to resize the graphic to make it more usable. However, because of Microsoft Office limitations, any excess background space will always be present.

- 13875551 -- When you export an Oracle Hyperion Interactive Reporting report from Internet Explorer into Smart View, the Smart View ribbon disappears in Excel.

Workaround: Open Excel before exporting from Internet Explorer.

Tips and Troubleshooting

This topic lists the most recent tips and troubleshooting topics. More tips and troubleshooting topics are listed in the *Oracle Smart View Installation and Configuration Guide*. This guide is available in the Smart View 11.1.2.5.610 library on the Oracle Help Center:

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

- **Smart View Diagnostics Tools**

When working with Smart View, if issues arise that you cannot resolve on your own, you can use the new Smart View diagnostic tools in the **Diagnostics** group in the Smart View ribbon to create and collect log files and screenshots to send to Oracle Support. When you are finished collecting diagnostic data, you use the diagnostic tools to zip up the files. Then you transmit the ZIP file to Oracle Support for analysis. The log files and screenshots are used by Oracle Support to troubleshoot and resolve your issue.

To enable the diagnostics tools, go to the **Options** dialog box, **Advanced** tab, and select **Show Diagnostics Group on Smart View Ribbon**.

See the “Smart View Diagnostics” chapter of the *Oracle Smart View for Office User's Guide* for more information on using the diagnostics tools.

- 19905121 -- When running a Oracle Hyperion Financial Reporting report from Smart View, a web control is called that causes this error to display: “The product does not support compatibility view. Contact your system administrator to help configure your settings.” By default, the web control runs in compatibility mode, triggering the compatibility message.

For workarounds, see “Internet Explorer Compatibility View Settings for Financial Reporting” in the *Oracle Smart View for Office Installation and Configuration Guide*

- 17263827, 17636796, 17667907, 20417037, 20564104, 20648759, 20696893 -- Microsoft has enabled Office Animations for the Task Pane and many controls within Office 2013. This causes flickering and screen movements in the following situations:
 - Opening forms, especially when opening composite and cascading forms.
 - Opening a web form that has a page drop-down.
 - Moving between simple forms on multiple sheets or between composite forms.
 - Refreshing a composite web form using the **Refresh All** command causes the POV toolbar to flicker and shift up and down.
 - Opening multiple connections in new tabs, whether you are opening composite forms or simple forms.
 - Accessing the About box from the Help button in the Smart View ribbon when the Oracle Hyperion Disclosure Management extension is also installed (note that per issue 17667907, a sharing violation error message is first displayed).

Workaround: Information on troubleshooting flickering issues is available in the *Oracle Smart View for Office Installation and Configuration Guide*. See “Flickering Issues on Office 2013 32-bit and 64-bit.” This topic contains detailed instructions on creating and configuring the DisableAnimations key and the DisableWindowTransitionsOnAddinTaskPanes key. Both work to reduce flickering in Office 2013.

Refer to Microsoft Windows documentation if you require further help creating these registry keys.

- 21038932 -- Smart View performance is slow in Excel 2013 when compared to earlier versions of Excel, requiring an update from Microsoft.

Workaround: Oracle recommends that you install the Office 2013 update noted in Microsoft KB 3085502:

<https://support.microsoft.com/en-us/kb/3085502>

Optionally, you may also perform the actions noted in “Flickering Issues on Office 2013 32-bit and 64-bit” in the *Oracle Smart View for Office Installation and Configuration Guide*.

- 21158660, 21298436, 21316619, 21781491, 21814502 -- In some cases, third-party software that automates Excel processes, such as exporting to Excel, may cause issues with Excel and a conflict with Smart View. To disable Smart View when Excel is started in automation mode, you may enable “DisableInAutomation” by adding a key and key value to the

Windows Registry. Refer to the *Oracle Smart View for Office Installation and Configuration Guide*, “Tips and Troubleshooting” chapter, “Issues When Starting Excel in Automation Mode” topic.

- 22078848 -- In some Word documents containing large queries created prior to Smart View release 11.1.2.5.520, performance may be very slow when refreshing the data in the document. In some cases, each Smart View data point in the Word document is treated as a separate query, instead of re-using existing queries where appropriate. The result is that Refresh operations are very slow.

To fix this issue, run the macro in “Duplicate Queries in Word Slow to Refresh” in the *Oracle Smart View for Office Installation and Configuration Guide*.

- 23084925 -- Administrators can push extension installations silently by calling the following command:

```
svlaunch.exe /I <path to the extension installer>
```

The silent installer may not work correctly some Microsoft Windows and Office platform combinations; for example:

- Windows 10 (64-bit) with MS Office 2016 (64-bit)
- Windows 8.1 (64-bit) with MS Office 2013 or 2016 (64-bit)

In these cases, install the extensions manually on each user’s machine by double-clicking the extension file in the Smart View installation folder.

For example, to install the extension for Oracle Journals for Financial Management on an individual user’s machine, navigate to the Smart View installation folder on that machine. By default, the location is:

```
C:\Oracle\SmartView\extensions
```

Then double-click the `SVFMJournalInstaller.svext` file.

- 23745106 -- If two-way SSL is set up with problematic certificates between Smart View and other EPM data providers, Smart View will prompt for the client-side certificate with every request. For example, the user will be prompted when connecting to the data source, connecting to an application, connecting to a database, and at every refresh, submit, or zoom operation.

To avoid this situation, you must update the `properties.xml` file on each end user machine to add the `clientCert` name tag. For example:

```
<cfg>
  <provider>
    <url>http://server:port/workspace/SmartViewProviders</url>
  </provider>
  <helpurlcontext></helpurlcontext>
  <extensionupdatelist>http://server:port/extensionupdatelist/UpdateList.xml |
%SVCLIENTINSTALLPATH%/extensions/UpdateList.xml</extensionupdatelist>
  <!-- Require Smart View to prompt the user for the client-side certificate -->
  <clientCert name="PROMPT-ONLY"/>
</cfg>
```


Documentation Updates

Subtopics

- [Accessing EPM System Product Documentation](#)
- [Copying and Pasting Code Snippets from PDFs](#)
- [Online Help in Internet Explorer](#)
- [Online Help Search in Internet Explorer](#)
- [Limited Chart Copy and Paste Support](#)
- [Changes to Financial Management Formulas in Smart View](#)
- [Office AutoCorrect Affecting Member Editing in Planning Admin Extension](#)

Accessing EPM System Product Documentation

Find the latest EPM 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 EPM tab, and then click the Enterprise Performance Management link.

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). Or you can visit the EPM System Documentation Portal (<http://www.oracle.com/us/solutions/ent-performance-bi/technical-information-147174.html>). There, you'll find links to My Oracle Support, EPM Supported Platform Matrices, and more.

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.

Online Help in Internet Explorer

Some tables and text may display incorrectly in online help when using Internet Explorer 9.

Online Help Search in Internet Explorer

19317836 -- In the Smart View HTML-based documentation, the Search functionality may not work correctly in Microsoft Internet Explorer. This includes help accessed from the Smart View product, and the Smart View product documentation in HTML format on the Oracle Help Center.

To resolve this issue, ensure that you are using Internet Explorer's Compatibility View mode when viewing the Smart View HTML-based documentation. See the Internet Explorer help for instructions on using Compatibility View.

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 Financial Management, do not paste correctly.

Changes to Financial Management Formulas in Smart View

21882424 -- After Financial Management 11.1.2.2.xxx, the custom dimensions in Oracle Hyperion Financial Management applications are referred to as alias names in Smart View formulas. The recent versions of Oracle Smart View for Office 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.

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In addition, this Readme file is accessible in HTML format.

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Smart View Readme, 11.1.2.5.610

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Authors: EPM Information Development Team

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