



ORACLE® SMART VIEW FOR OFFICE

Release 11.1.2.5.700

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

Subtopics

- [New Features in this Release](#)
- [New Features in Release 11.1.2.5.620](#)

This section includes new features in Release 11.1.2.5.700. 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 Features in this Release

Subtopics

- [Insert Charts Based on Planning Forms](#)
- [Oracle Journals for Financial Management Features](#)
- [New VBA Functions for Essbase](#)
- [New HsAlias Function](#)
- [Additional Provider Support for HsDescription](#)
- [New Cell Styles Category for Oracle Profitability and Cost Management Cloud](#)
- [Oracle Enterprise Performance Reporting Cloud Features](#)
- [Support for Close Management and Supplemental Data Management Extensions](#)
- [Support for Oracle Analytics Cloud](#)
- [Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud Features](#)
- [Support for Strategic Modeling Extension](#)

Insert Charts Based on Planning Forms

You can now insert Planning forms as charts into Microsoft PowerPoint, giving you a graphical display of the information in the form.

Smart View renders the form information as a chart in PowerPoint. You can use the chart tools in PowerPoint to change the chart design and format. You can insert a Smart View POV reporting object to change the POV of the chart. You can also insert a table to see the chart data in table format.

Note: You can insert one chart per form per presentation. You can insert charts from multiple forms in one presentation. You cannot copy and paste charts between slides or between presentations.

See “Inserting Charts” in the *Oracle Smart View for Office User's Guide* for more information.

Oracle Journals for Financial Management Features

Subtopics

- [View Financial Management Journal Reports in Smart View](#)
- [New VBA Functions to Support Oracle Journals Extension for Financial Management](#)

View Financial Management Journal Reports in Smart View

The Oracle Journals extension now supports opening Oracle Hyperion Financial Management journal reports in Excel. You can view journal reports to check journal status and to review journal adjustments.

See “Viewing Journal Reports” in the *Oracle Smart View for Office User's Guide* for more information.

This functionality requires Financial Management 11.1.2.4.204 with the 11.1.2.4.204 PSE 25575478. Additionally, you must install Smart View 11.1.2.5.700 and the Oracle Journals for Financial Management extension that is included with this release.

New VBA Functions to Support Oracle Journals Extension for Financial Management

This release introduces several VBA functions that support the Oracle Journals extension. The new VBA functions are:

- **ListJournals()** lists all the available Oracle Hyperion Financial Management journals.
- **OpenJournal()** opens the specified journal.
- **SetJournalProperty()** sets the specified properties for the currently open journal.
- **ListTemplates()** lists all the available journal templates.
- **CreateJournal()** creates a blank journal or a journal based on a Standard or Recurring template.
- **SaveJournal()** saves a journal on the Oracle Hyperion Financial Management server.
- **PerformAction()** performs one of the following operations: POST, UNPOST, SUBMIT, UNSUBMIT, APPROVE, REJECT or DELETE.
- **ValidateJournal()** validates dimensions, members, and journal properties by communicating with the Financial Management server.

See “Oracle Journals for Financial Management Functions” in the *Oracle Smart View for Office Developer's Guide* for more information on using these functions.

Note: Financial Management 11.1.2.4.204+ is required in order to use the VBA functions for Oracle Journals.

Additionally, the **ValidateJournal()** function requires Financial Management 11.1.2.4.204 and the 11.1.2.5.204 PSE 25575655.

New VBA Functions for Essbase

Two new VBA functions for Oracle Essbase are introduced in this release, **HypGetCalcScript()** and **HypExecuteCalcScriptString()**.

- **HypGetCalcScript()** gets the calculation script string for a given calculation script. The string is the contents of the calculation script.
- **HypExecuteCalcScriptString ()** executes a calculation script along with substitution variables. This function allows you to customize the script string, or use portions of strings from different calculation scripts.

This function requires Oracle Hyperion Provider Services 11.1.2.4.017 or higher.

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

New HsAlias Function

A new Smart View function, **HsAlias**, is now available. The **HsAlias** function displays the alias of the specified dimension member. This function is supported for Oracle Planning and Budgeting Cloud platform services, including Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Financial Consolidation and Close Cloud, and Oracle Tax Reporting Cloud.

Note: Function nesting is not supported for **HsAlias**. That is, **HsAlias** output cannot be referenced in another **HsAlias** function.

See “**HsAlias**” in the *Oracle Smart View for Office User's Guide* for more information.

To display the description of a specified dimension member, use **HsDescription**. See [“Additional Provider Support for HsDescription” on page 4](#).

Additional Provider Support for HsDescription

The **HsDescription** function is now supported by Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Financial Consolidation and Close Cloud, Oracle Tax Reporting Cloud, and Oracle Analytics Cloud - Essbase.

HsDescription usage has changed as follows:

HsDescription displays the description of the specified dimension member. For Essbase and Oracle Analytics Cloud - Essbase, HsDescription returns the alias name of the specified dimension member.

See “HsDescription” in the *Oracle Smart View for Office User's Guide*.

New Cell Styles Category for Oracle Profitability and Cost Management Cloud

You can now define cell styles specific to Oracle Profitability and Cost Management Cloud using the “PCM” category in the **Cell Styles** page of the **Options** dialog box.

The first time that Smart View is used with Oracle Profitability and Cost Management Cloud, the cell styles in effect are the default Oracle Profitability and Cost Management Cloud styles. On the **Cell Styles** page, you can change the formatting styles for certain types of member and data cells in the **PCM** category. Because cells may belong to more than one type—a member cell can be both parent and child, for example—you can also set the order of precedence for how cell styles are applied.

For more information, see “Cell Styles” in the *Oracle Smart View for Office User's Guide*.

Oracle Enterprise Performance Reporting Cloud Features

Subtopics

- [Additional Features for PowerPoint-based Report Packages](#)
- [Smart View Support for Disclosure Management Option for Enterprise Performance Reporting Cloud](#)
- [Support for Automatically-Generated Table of Contents in Report Packages](#)
- [Exclude Doclet from Author Phase](#)
- [Performance Improvements](#)

Additional Features for PowerPoint-based Report Packages

PowerPoint-based report packages in Oracle Enterprise Performance Reporting Cloud now support these features:

- Embedding content from reference doclets, reference files, and Management Reports in PowerPoint doclets
- Create static and reference variables in PowerPoint with the following exception: Reference variables may be *created* in PowerPoint, but cannot be *sourced* from PowerPoint.
- Inserting static and reference variables in PowerPoint doclets

In prior releases, this functionality was available only in Word-based report packages.

In the *Oracle Smart View for Office User's Guide*, “Smart View and Enterprise Performance Reporting Cloud” chapter, see the following sections:

- “Working with Embedded Content from Reference Doclets”

- “Working with Embedded Content from Reference Files”
- “Working with Variables”

These features require Smart View release 11.1.2.5.700 and, at a minimum, the 17.04 extension for Oracle Enterprise Performance Reporting Cloud.

Smart View Support for Disclosure Management Option for Enterprise Performance Reporting Cloud

The Oracle Disclosure Management Option for Enterprise Performance Reporting Cloud, available for use under a separate license, allows users to develop their regulatory filings in a unified, collaborative environment. SEC filers, for example, may generate both XBRL and EDGAR HTML filing outputs from the same source, ensuring 100% validation of XBRL filings. It also emphasizes reuse and efficiency through its easy-to-use rollover process, providing XBRL tag migration and variable-driven smart text.

With this option, you can upload a Disclosure Management report to the Oracle Enterprise Performance Reporting Cloud library so you can open it in Smart View. For example, use a Microsoft Word file as your starting point for your Disclosure Management report. For more information on Disclosure Management, see “About Disclosure Management” in the *Disclosure Management Working with Disclosure Management for Oracle Enterprise Performance Reporting Cloud*.

Note: For clients reporting to Colombian regulators, integration with Oracle Enterprise Performance Reporting Cloud occurs through the HVX connection on the Excel ribbon. You open the regulator’s Microsoft Office Excel workbook directly in Smart View and enter through the High Volume XBRL tab on the ribbon.

Support for Automatically-Generated Table of Contents in Report Packages

Starting with the 17.07 update, when you insert a Microsoft Word table of contents into a doclet, you can now choose automatic or custom types. Automatic or custom tables of contents are updated whenever the doclet is merged into the report package (for example, by previewing the report package or section).

Note: Automatic and custom tables of contents are available for Microsoft Word report packages only.

This feature requires the Oracle Enterprise Performance Reporting Cloud 17.07 extension update for Smart View.

Exclude Doclet from Author Phase

When the report package owner enables the author phase of a report package, then, by default, all doclets must be assigned to at least one author. However, certain types of boilerplate doclets (for example, copyright statements) may not need to be updated or authored on a regular basis. The report package owner now has the ability to exclude these doclets from the author phase of

report package development. When a doclet is excluded from the author phase, authors will not see the doclet listed in the report package.

Performance Improvements

When used with Smart View 11.1.2.5.700, the Oracle Enterprise Performance Reporting Cloud 17.07 extension update provides numerous performance improvements to ensure faster response to user actions and faster refreshes of the Smart View Panel. It also provides the ability to combine multiple user actions on a doclet, such as Download and Checkout, minimizing user clicks. You must install Smart View 11.1.2.5.700 and the Oracle Enterprise Performance Reporting Cloud 17.07 extension update to ensure compatibility with the July 2017 Oracle Enterprise Performance Management Cloud update features and to access the new functionality. See “Setting Up Enterprise Performance Reporting Cloud in Smart View” in the *Oracle Smart View for Office User's Guide* for instructions.

Support for Close Management and Supplemental Data Management Extensions

This feature applies to Oracle Financial Consolidation and Close Cloud and Oracle Tax Reporting Cloud.

Smart View now supports working directly with Close Manager tasks and schedules, as well as supplemental data. Users can view a list of their current tasks and submit and approve them from Smart View. To accomplish this, you install the new Close Management extension for Smart View, along with the Supplemental Data extension, introduced in an earlier update.

From the **Downloads** page of your service, install the Smart View Extension for Close and Supplemental Data Management. The two extensions are installed from this single installer. After installation, when you open Excel, you will see new ribbons labeled **Close Tasks** and **Supplemental Data**.

See *Working with Oracle Financial Consolidation and Close Cloud* or *Working with Oracle Tax Reporting Cloud* for information on using these extensions. For instructions on installing the extensions, see *Getting Started with Oracle Financial Consolidation and Close Cloud* or *Getting Started with Oracle Tax Reporting Cloud*.

Support for Oracle Analytics Cloud

Smart View allows users to connect to Oracle Analytics Cloud and utilize the content created in dashboards and analyses. In addition to working with content created in Oracle Analytics Cloud, Smart View users can create views with the View Designer, using Oracle Analytics Cloud as the data source. The views created can then be published to the Oracle Analytics Cloud, where they can be edited further.

Smart View offers Oracle Analytics Cloud users a cohesive and consistent experience across all Oracle Analytics Cloud content providers.

When connected to an Oracle Analytics Cloud data source in Smart View, you can:

- Connect to Oracle Analytics Cloud.

- Navigate through the Oracle Analytics Cloud catalog.
- Import pre-created Oracle Analytics Cloud views from into Microsoft Excel, PowerPoint, and Word. For example, you can:
 - Insert tables, pivot tables, and graphs into Excel as refreshable, editable objects.
 - Apply Excel formatting to business intelligence data; formats are retained when you refresh.
- Copy Oracle Analytics Cloud dashboard content and paste it into Smart View client documents. The data, metadata, and view layout are copied.
- Create views in Excel using Oracle Analytics Cloud as the source for metadata and data.
- Interact with content imported into Smart View documents, such as prompt selections, refresh, and copy and paste.

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

Subtopics

- [Ability to Manage Applications from Smart View](#)
- [Support Added for Google Chrome](#)
- [Smart View Supports Business Rules Written in the Groovy Scripting Language](#)

Ability to Manage Applications from Smart View

Administrators can now use Excel to manage applications in Smart View. Using a downloadable Excel workbook template, you can quickly create Planning applications in Smart View. By editing worksheets within the application template workbook, you define application properties, dimension and member properties, security (access permissions), and substitution variables. You can also load data from the template. Once the application is created, it is available to users from Smart View, Oracle Planning and Budgeting Cloud, or Oracle Enterprise Planning and Budgeting Cloud. The application can be further edited, updated, and deleted in Smart View. See *Administering Planning for Oracle Planning and Budgeting Cloud* for more information.

Support Added for Google Chrome

Oracle Planning and Budgeting Cloud 17.06+ and Oracle Enterprise Planning and Budgeting Cloud 17.06+ now support interoperability with Google Chrome and Smart View 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 to access Oracle Planning and Budgeting Cloud or Oracle Enterprise Planning and Budgeting Cloud when performing drill-through operations.

Smart View Supports Business Rules Written in the Groovy Scripting Language

Starting with Enterprise Planning and Budgeting Cloud 17.06, Smart View can now execute business rules written in the Groovy scripting language.

Support for Strategic Modeling Extension

Strategic Modeling combines a set of rich financial forecasting and modeling features with built-in on-the-fly scenario analysis and modeling capabilities. It helps users quickly model and evaluate financial scenarios, and offers out-of-the-box treasury capabilities for sophisticated debt and capital structure management. It provides a compelling solution that can be used to set targets, perform quick financial impact analysis, and present focused financial data for informed decision making.

Integration with Smart View and the Strategic Modeling extension provides a familiar interface for creating models, designing custom reports, and adding and editing account groups and dataviews. Additionally, it provides features such as:

- Depreciation Scheduler
- Sensitivity Analysis
- Debt Schedules
- Funding options
- Currency translations
- Tax and valuation options

On the Oracle Help Center, Oracle Planning and Budgeting Cloud Books page, see *Working with Strategic Modeling in Smart View* for more information.

New Features in Release 11.1.2.5.620

Subtopics

- [Support for Oracle Analytics Cloud - Essbase](#)
- [New Cube Designer Extension for Oracle Analytics Cloud - Essbase](#)
- [Support for Oracle Tax Reporting Cloud](#)
- [New VBA Functions](#)
- [Support for Selectively Deleting Connections](#)
- [Excel Filters Now Retained During Ad Hoc Analysis](#)
- [New Option for Sorting Items in Smart View Panel](#)
- [Planning and Budgeting Cloud, Enterprise Planning and Budgeting Cloud Features](#)
- [Oracle BI EE Enhancements](#)

Support for Oracle Analytics Cloud - Essbase

In this release, Smart View extends support to Oracle Analytics Cloud - Essbase.

Oracle Analytics Cloud - Essbase is a subscription-based business analytics solution that is built for and deployed on Oracle Cloud. With Smart View, users interact with Oracle Analytics Cloud - Essbase data in Microsoft Office to analyze, model, collaborate, and report.

For more information on Oracle Analytics Cloud, go to the Oracle Analytics Cloud page on the Oracle Help Center.

<http://docs.oracle.com/cloud/latest/analytics-cloud/index.html>

For information on installing Smart View and setting up data sources to Oracle Analytics Cloud - Essbase, and working with Oracle Analytics Cloud - Essbase data in Smart View see:

- “Smart View and Oracle Analytics Cloud - Essbase” in the *Oracle Smart View for Office User's Guide*
- Smart View topics listed in [Managing Client Software](#)

New Cube Designer Extension for Oracle Analytics Cloud - Essbase

Cube Designer, a new Smart View extension, lets you create or modify application workbooks and then deploy cubes to the Oracle Analytics Cloud - Essbase from Excel.

Cube Designer helps you to design, create, and modify application workbooks that meet strict layout and syntax requirements. You can also use options on the Cube Designer ribbon to perform a number of cube management tasks, such as loading data, editing formulas and viewing jobs.

For more information, see [Working with Cubes in Cube Designer](#) in the *Oracle Analytics Cloud - Essbase Using Oracle Analytics Cloud - Essbase*.

For information on installing and updating the Cube Designer extension, see [Installing the Smart View Cube Designer](#) and [Updating the Smart View Cube Designer Extension](#).

Support for Oracle Tax Reporting Cloud

In this release, Smart View extends support to Oracle Tax Reporting Cloud.

Oracle Tax Reporting Cloud is a subscription-based global tax reporting solution, built for and deployed on Oracle Cloud. From Smart View, you can access Oracle Tax Reporting Cloud functionality in forms and ad hoc grids.

For more information, go to the Oracle Tax Reporting Cloud page on the Oracle Help Center.

<http://docs.oracle.com/cloud/latest/tax-reporting-cloud/index.html>

New VBA Functions

Several new VBA functions are introduced in this release.

- **HypSetSSO** sets the SSO token in Smart View. When set, the SSO token takes priority over user name and password. This function is supported by all providers that support Single Signon (SSO).

- **HypListApplications** gets the list of applications and their descriptions for the requested provider. This function is supported by Essbase, Financial Management, Oracle Hyperion Planning, and Oracle Planning and Budgeting Cloud. (24401892)
- **HypListDatabases** gets the list of cubes (databases) present under an application for the requested provider. This function is supported by Essbase, Planning, and Oracle Planning and Budgeting Cloud. (24401892)
- **HypGetSheetInfo** retrieves detailed information about the requested worksheet. This function is supported by all providers.

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

Support for Selectively Deleting Connections

You can now select specific shared and private connection URLs, as well as extension update URLs, using the new **Delete Connection URLs** command.

You access this command from the private connection panel in Smart View. The **Delete Connection URLs** dialog allows you to select specific private connections, shared connections, and extension update URLs for deletion.

Note: You can only delete private connections that were created using the quick connection method. Connections created using the private connection wizard will not be available for deletion in the **Delete Connection URLs** dialog.

For more information, see “Deleting Connections” in the *Oracle Smart View for Office User's Guide*.

Excel Filters Now Retained During Ad Hoc Analysis

Excel filters are now retained for most ad hoc operations, such as Zoom In, Zoom Out, Remove Only, and Keep Only, Undo, and Redo, as long as the same set of column dimensions appear in the result set. Excel filters are also retained after a Submit or a Refresh.

Excel filters are not retained for Pivot or Pivot to POV operations, or on multiple-grid sheets.

For more information, see “Working with Excel Filters on Ad Hoc Sheets” in the *Oracle Smart View for Office User's Guide*. (24717069)

New Option for Sorting Items in Smart View Panel

You can now sort items in the Smart View Panel using the new **Sort Items in Smart View Panel** option.

When this option is selected, Smart View sorts items in the Smart View Panel by category first, and then in order within categories. The order is first numerical, then alphabetical.

For example, when this option is selected, the Task List folder is sorted below the Root folder. The items in the Task List folder are then sorted in order first numerically, then alphabetically.

When this option is cleared, items in the Smart View Panel are sorted according to the order returned by the provider.

This option is located in the **Options** dialog, **Advanced** tab. (23562613)

Planning and Budgeting Cloud, Enterprise Planning and Budgeting Cloud Features

Subtopics

- [Smart Form Support for Some Smart View Functions](#)
- [Qualified Name Support for Alternate Hierarchy Members in Smart View](#)

Smart Form Support for Some Smart View Functions

A subset of Smart View functions are now supported in Smart Forms. Those functions are:

- HsGetValue
- HsSetValue
- HsActive

Qualified Name Support for Alternate Hierarchy Members in Smart View

When connected to Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, or Oracle Financial Consolidation and Close Cloud, alternate hierarchies are supported in the Entity dimension. One entity can have multiple parents, and contribute differently to each parent. These members are referred to as “partially shared” entities, because only a part of input data is shared across all instances of the entities.

In this release, Smart View supports qualified member name display for partially shared members in alternate hierarchies. In Smart View, partially shared members require qualifying member names and aliases so that users can uniquely reference the specific instance of a member, and can then enter appropriate values based on this context. The most common example is the Percentage Contribution (PCON) metric used for weighted consolidations in Oracle Financial Consolidation and Close Cloud. The qualified names help users to understand the member context so that they can enter the correct values.

Information on qualified name behavior for partially shared members in alternate hierarchies is available in the *Oracle Smart View for Office User's Guide*. See “Qualified Name Display in Alternate Hierarchies.”

Oracle BI EE Enhancements

- When connected to Oracle Business Intelligence Enterprise Edition, folder names are now included in column headings in views inserted in Smart View. (24670752)

- An empty row is no longer added along with the column header when inserting an Oracle BI EE pivot table view. (24754069)
- In Word, column header formatting for table views is preserved when performing a Replace View. (24832117)

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 11.1.2.5.700 library on the Oracle Help Center.

<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

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 11.1.2.5.700 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

Subtopics

- [Microsoft Internet Explorer and Mozilla Firefox](#)
- [Google Chrome](#)

Smart View 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>

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 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.

Google Chrome

Oracle Planning and Budgeting Cloud 17.06+ and Oracle Enterprise Planning and Budgeting Cloud 17.06+ support interoperability with Google Chrome and Smart View 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.

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 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 11.1.2.5.700 (included with Smart View 11.1.2.5.700)

Oracle BI EE Support

- To use the Oracle BI EE-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 11.1.2.5.700 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 11.1.2.5.700 from the following releases:

Table 1 Supported Paths to this Release

Release Upgrade Path From	To
11.1.2.x	11.1.2.5.700

Note: When upgrading from release 11.1.1.3.x and earlier, Oracle recommends uninstalling Smart View before installing release 11.1.2.5.700.

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 Enterprise Performance Reporting Cloud](#)
- [Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud](#)
- [Oracle BI EE](#)

This section includes defects fixed in Release 11.1.2.5.700. 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

- 25592048 -- With multiple functions on a sheet using the shared connection function format, users were prompted to log in for every function on the sheet, even after clicking the Cancel button in the login window.
- 25704554 -- A new option for the “Preserve Formula on POV Change” setting (Options dialog, Member Options tab) is added to HypGetOption: HSV_PRESERVE_FORMULA_ONPOVCHANGE.

See [“Added Option Constant for HypSetOption and HypGetOption”](#) on page 35 for more information.

Essbase

25651863 -- Performance is improved when refreshing workbooks with multiple sheets, multiple connections, and multiple filters.

Financial Management

- 25492176 -- Improvements were made in order to automatically reconnect to the provider when users attempt a Smart View operation after a session timeout.
- 25582192 -- When creating journals, Smart View was not able to locate the templates that were stored in Financial Management.

Oracle Enterprise Performance Reporting Cloud

26431668 -- When using the **Open and Check Out** command on a doclet that was not in the root directory, the doclet was opened but the hierarchy of doclets in the doclet panel was not properly refreshed, resulting in a Microsoft .NET Framework exception.

This defect is fixed in the 17.08 Oracle Enterprise Performance Reporting Cloud extension for Smart View. The 17.08 extension is compatible with Smart View 11.1.2.5.700.

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

- 21501674 -- Starting in Oracle Planning and Budgeting Cloud or Oracle Enterprise Planning and Budgeting Cloud 17.07, aggregate storage cubes are no longer listed in the Smart View Panel when either one dimension or no dimensions are enabled in the cube.
- 24819278 -- In the Job Console in Smart View, date and time zone settings now display according to the user's selections made in the Application Settings in Oracle Planning and Budgeting Cloud.
- 24962450 -- Even when all parameters were valid, HypSetActiveMember was returning code -15, but now correctly returns code 0.
- 25489101 -- In **User Preferences**, changing the alias table requires that you disconnect and then reconnect to the data source for the change to take effect.

Note: The change may not be observed if a private connection to the same server already exists.

Oracle BI EE

- 23116349 -- Views now insert properly when optional date prompts are left empty.
- 24837290 -- Smart View now correctly inserts compound views that have hidden columns and sections.

- 25306113 -- In Smart View, column header formatting was incorrect when inserting table views with hidden columns.
- 25770431 -- An erroneous message about a change in view definition no longer appears when performing refreshing a view.

Known Issues

Subtopics

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

The following are 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 Smart View 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

- 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.

- 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.

- 22280411 -- There are compatibility issues between 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.

- 24907354 -- When you open an ad hoc analysis report or Smart Form containing a Smart View function, the function cells display the error text, "Error Run Formulas Interrupted."

Workaround: In the **Options** dialog, **Advanced** tab, select the **Refresh Selected Functions and their Dependents** option, then restart Smart View and re-open the ad hoc report or Smart Form. Otherwise, click **Refresh** to update the function cells with their correct values.

- 25766574 -- Zero (0) may be displayed for functions using the shared connection function format. This specific case occurs with the following actions: opening a workbook containing these functions, canceling the initial logon dialog followed by executing the refresh operation. For this case, a second refresh is required.

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

- Oracle Enterprise Performance Reporting Cloud makes use of the Microsoft Office clipboard when performing certain operations. Clipboard usage can cause issues when performing certain operations related to embedded content and variables:
 - Refreshing embedded content in Word, particularly if the embedded content consists of an image

Note that when closing the doclet, you may encounter a message informing you that there is content left in your clipboard, and confirming that you want to close the doclet. You may select Yes in this message. However, if you want to keep the contents of the clipboard, be sure to perform the workaround noted below.
 - Inserting variables in PowerPoint

In both these cases, anything previously in the Office clipboard is erased, even if the clipboard content was unrelated to the Oracle Enterprise Performance Reporting Cloud session.

Workaround: If you want to keep the content of the Office clipboard, ensure that you have pasted the content into another Office document before proceeding.

- 24825354 -- When 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.
- 25127875 -- In an open, checked-out doclet, if you access the **Make Version Current** action in the **Properties** dialog by clicking the **View Properties** link in the Smart View Panel, you must close and then reopen the doclet to see the reverted version. Ensure that the version shown is the version you require, then you may continue working on the doclet or check it in.
- 25863248 -- If you have placed embedded content at the beginning of a Word doclet (the first line and first space of the Word document), you cannot embed content before the already-embedded content. You may embed content immediately after the already-embedded content, but not before it.

Workarounds:

- You can delete the embedded content and then re-embed the content in the correct order. To delete the embedded content, add a blank line after the embedded content, then select the blank line along with the embedded content, then right-click and select **Remove Content Control** from the context menu. Next, select the blank line and embedded content again, and then press **Delete**.
- Place a blank line at the beginning of the Word document to ensure that, if necessary, you can insert embedded content before the first instance of embedded content.
- 25863263 -- If you have embedded content consisting of a multiple line grid at the beginning of a Word doclet (the first line and first space of the Word document), you cannot delete only the embedded content. Note that you can delete a single line grid that was embedded at the beginning of a Word doclet.

Workaround: Add a blank line after the embedded content, then select the blank line along with the embedded content, then right-click and select **Remove Content Control** from the context menu. Next, select the blank line and embedded content again, and then press **Delete**.

See the *Oracle Enterprise Performance Reporting Cloud Release Readiness* document in your service environment for other 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.

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.

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 cause the pasted cell data to change from text to numeric.
- 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.

- 25387251 -- When the Member Name Display option is set to “Member Name Only,” after inserting a column and typing member name in free-form mode, then clicking Change Alias and selecting “None,” the member that you just entered on the sheet is moved from the grid to the POV.

Workaround: Before clicking Change Alias, refresh the sheet.

- 26129045 -- If row drop-down menus are enabled on a form, then Smart Push (which brings in data from different cubes into one form) cannot be used.

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.

- 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.

- 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.

- 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.
- 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.
- 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.

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.

- 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.

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 11.1.2.5.700 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 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 DisableWindowTransitionsOnAddinTaskPanels 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*.

- 22330209 -- When Microsoft Internet Explorer is running in protected mode, web launch does not function. This means you cannot launch Smart View reports from Internet Explorer.

Workaround:

1. In Internet Explorer, go to **Internet Options**, then **Security**, and then **Trusted sites**.
 2. Click **Sites**, and add the workspace URL or cloud service URL to the list of trusted sites.
 3. Verify that the **Enable Protected Mode** check box is cleared.
- 23745106 -- If two-way SSL is set up with problematic certificates between Smart View and other EPM System 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>
```

- 24683166, 25138349 -- In some Oracle Hyperion Provider Services clustered environments, if Smart View requests appear to be going to only one server in the cluster (that is, the load is unbalanced), then try changing the security level in Microsoft Internet Explorer to Medium.

To do this, in Internet Explorer, go to **Tools**, then **Internet Options**, and then select the **Security** tab. Under **Security levels for this zone**, set the allowed level for the affected zone to **Medium**.

- 25729481 -- Clearing the **Retain numeric formatting** option may improve performance in some cases. You can find this option in the **Options** dialog, **Formatting** tab.

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](#)
- [Zooming Operations when Formula Fill is Enabled](#)
- [Order of Operations in Free-Form Mode](#)
- [Added Option Constant for HypSetOption and HypGetOption](#)
- [Office Copy and Paste Not Supported for Reporting Objects](#)

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 Enterprise Performance Management tab, and then look for your release in the 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). 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 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.

Zooming Operations when Formula Fill is Enabled

24760036 -- With the **Formula Fill** option enabled, some zoom operations in large grids may be time consuming. For example, a zoom in to the bottom level of a large hierarchy resulting in a grid of 16,000+ rows may take a long time to complete.

Order of Operations in Free-Form Mode

25387251 -- In an ad hoc grid, if you insert a column and type a member name in the new column, and want to change the alias table for the sheet, you must first refresh the sheet before changing the alias table.

Added Option Constant for HypSetOption and HypGetOption

25704554 -- A new option for the “Preserve Formula on POV Change” setting (Options dialog, Member Options tab) is added to HypGetOption:

HSV_PRESERVE_FORMULA_ONPOVCHANGE. The data type is Boolean, and the constant value is 24.

For example:

```
Sub set()  
s = HypSetOption(HSV_PRESERVE_FORMULA_ONPOVCHANGE, False, "Sheet1")  
s = HypGetOption(HSV_PRESERVE_FORMULA_ONPOVCHANGE, ret, "Sheet1")  
End Sub
```

See the *Oracle Smart View for Office Developer's Guide* for information on using the HypSetOption and HypGetOption functions.

Office Copy and Paste Not Supported for Reporting Objects

25788369 -- Office Copy and Paste is not supported for copying and pasting Smart View objects—such as charts, tables, or the POV—between slides, pages, and sheets. Smart View does not always handle the invalid copy gracefully. For example, in PowerPoint, if a Smart View chart is copied using Office Copy and Paste, an error message is displayed upon Refresh. Follow these guidelines:

- Do not use Office Copy and Paste to copy Smart View reporting objects. Instead, use Smart View Copy and Paste.
- Do not copy and paste charts inserted using the Insert Chart command in PowerPoint. This applies to both Office Copy and Paste and Oracle Smart View for Office Copy and Paste.

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Accessibility Considerations

Our goal is to make Oracle products, services, and supporting documentation accessible to the disabled community. EPM System products support accessibility features, which are described in the product's *Accessibility Guide*. Find the most up-to-date version of this guide in the Oracle Enterprise Performance Management System Documentation Library on the Oracle Technology Network (<http://www.oracle.com/technology/documentation/epm.html>).

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

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Smart View Readme, 11.1.2.5.700

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