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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 the Oracle Enterprise Performance Management System and Smart View.

New Features in This Release

See the Oracle Smart View for Office New Features.

For new features relating to EPM 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. 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

Installation topics are covered in the Oracle Smart View Installation and Configuration Guide. This guide is available in the Smart View 11.1.2.5.500 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.

Information for 64-Bit Microsoft Office Installations

If you use 64-bit Office, please note the following:

- Although Oracle Hyperion Planning Offline is supported for 64-bit operating systems, it is not supported for 64-bit Smart View installations. If you use Planning Offline with Smart View, you must use the 32-bit version of Microsoft Office.

- 14342207 -- The Smart View function migration utility is not supported on 64-bit Office. This is a Microsoft issue, and a service request has been filed with Microsoft.

  Workaround: Until the Microsoft fix, use the 32-bit version of Office.
Supported Platforms

Subtopics

- Microsoft .NET Framework Support
- Financial Management Journals Extension Support
- Oracle BI EE Support
- Browser 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):


Note: Unless otherwise stated in this readme, platform support in Smart View 11.1.2.5.500 follows that which is stated in the 11.1.2.4 version of the Oracle Enterprise Performance Management System Certification Matrix.

Microsoft .NET Framework Support

Smart View 11.1.2.5.500 requires Microsoft .NET Framework 4.5 or higher.

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.

- 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. You can access views to edit in these ways:

- **During the design session**—For example, after you created the view in View Designer and clicked OK to insert the view, select the view within the Office document and click the View Designer icon to relaunch the View Designer for editing.

- **From a view in a saved Office document**—Select the view within the Office document and click the View Designer icon to relaunch the View Designer for editing.

- **From a published view in the Presentation Catalog**—Right-click the view in the catalog tree, and then select “Load view in View Designer”.

Note that you should not use View Designer in Smart View to edit views that were created using Oracle Business Intelligence Answers. Views may not load in cases where the View Designer does not support the formatting and design features that were used to create the view in BI Answers. For this reason, use the View Designer to edit only those views that were created and inserted using the View Designer in Smart View.

See “Editing Views Created in View Designer” in the *Oracle Smart View for Office User’s Guide* for more information.

- **18377748** -- On each Smart View client machine, the following locale settings must match:
  - Smart View language option
  - Microsoft Office language
  - Windows Regional Settings
  - Windows operating system

When working with Oracle BI EE data sources, 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, chart data may display incorrectly.

### Browser Support

Although Smart View does not have a browser version dependency, 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.

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

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:


**Note:** Unless otherwise stated in this readme, language support in Smart View 11.1.2.5.500 follows that which is stated in the 11.1.2.4 version of the *Oracle Enterprise Performance Management System Certification Matrix*.

Supported Paths to this Release

You can upgrade to Smart View Release 11.1.2.5.500 from the following releases:

<table>
<thead>
<tr>
<th>Release Upgrade Path From</th>
<th>To</th>
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<tr>
<td>11.1.2.x</td>
<td>11.1.2.5.500</td>
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**Note:** When upgrading from release 11.1.1.3.x and earlier, Oracle recommends uninstalling Smart View before installing release 11.1.2.5.500.

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:

Defects Fixed in this Release

Subtopics
- General
- Essbase
- Financial Management
- Oracle BI EE
- Planning

General
- 17021572 -- The VBA function, HypSetConnAliasTable, was not setting the correct alias or POV for the connection.
- 17460364 -- When the Predictive Planning extension is enabled in Smart View, and the user opens a composite form which does not have business rules associated with it, but the base forms do have business rules associated with them, a “Cannot cannot to the provider” error occurs while trying to save the form.
  
  This issue is resolved with the Predictive Planning 11.1.2.3.500 release.
- 21236427 -- Smart View terminates abnormally when running the VBA function, HypGetMemberInformation, on a disconnected worksheet.
- 18370823 -- When Formula Fill is enabled, formulas are removed after a Refresh.
- 19468792 -- Web launch operations do not work from Internet Explorer 64-bit to Office 32-bit.
- 20741558 -- The modified Smart View options are not maintained in the file once the file is saved after Sheet Info is deleted once.
- 20978013 -- The VBA function, HypRetrieve, does not support creating a multiple-grid sheet. Use the HypRetrieveRange function instead.
  
  See the example in “HypRetrieveRange” in the Oracle Smart View for Office Developer’s Guide.
- 21218542 -- The VBA function, HypRetrieveRange, triggers in error the Excel event, Worksheet_Activate().
- 21237876 -- If the Months/Period in the format of MMM-YY are selected from the POV drop-down, while the POV is on the grid in Excel versus in the POV Toolbar, then switching to another member causes Excel to automatically convert the member name to a date format.
- 21273300 -- The VBA function, HypRetrieveRange, returns an unknown error code.
- 21285459 -- The VBA function, HypZoomin, needs to be preceded by HypMenuVRefresh for zoom in to work.
Essbase

- 18281711 -- Starting with Smart View release 11.1.2.5.500, you can now perform Smart View Undo and Redo operations on a grid within a multiple-grid worksheet by using the right-click menu. On a multiple-grid worksheet, right-click on a cell within the grid on which you want to perform the Undo or Redo operation, then select Smart View, and then Undo or Redo.

- 18428866 -- A user with access privileges to an Oracle Essbase database is unable to create a Smart Query when connected to that database.

- 20170894 -- Smart View refresh on multiple-grid worksheets fails when the sheet name contains a single quote (').

- 20471978 -- Using a mix of dragging the mouse and pressing the Ctrl key to select a range of members for zooming in causes duplicate members to display.

- 21309712 -- The HypZoomIn function does not work when the active sheet is not connected, even though a connection was made on a previous sheet.

- 21359206 -- In some cases, when using a private connection with an ASO application, some ad hoc functionality, such as Zoom Out, Keep Only, and Remove Only, was not working.

- 20985138 -- When performing ad hoc analysis against an Essbase data source, custom headers or footers are not displayed correctly in print preview.

- 21264168 -- Users cannot submit #MISSING values using the Submit Data option, and must use the Submit Data Without Refresh option instead.

Financial Management

- 18605071 -- When opening a form for the first time in Smart View, the preferences set from Smart View are honored instead of the preferences set in the Financial Management web application.

- 20641558 -- For Financial Management data sources, HsSetText sends 0.000000 instead of cell text that HsGetText retrieves in the same sheet.

- 21055937 -- Member search in the Member Selection dialog box doesn't yield any results when working with Web Data Entry Forms.

- 21294021 -- POV Manager does not display the dimension members for data points pasted in PowerPoint.

- 21182191 -- If a web form contains the @Cur function and is saved locally as a sheet, and is then reopened in Smart View, an "Invalid Dimension ID" error occurs when data is submitted.

Oracle BI EE

- 19475349 -- In reports created in the Smart View View Designer, if the associated data contained the hexadecimal value of 0x13, an invalid character error occurred, resulting in this message: "'!!', hexadecimal value 0x13, is an invalid character."
- 20295285 -- Oracle BI EE content is not viewable in Smart View when called from an Oracle BI EE catalog shortcut link.
- 20698288, 20803386 -- When retrieving data from a table in Oracle BI EE, the first column gets merged every 500th record.
- 20833815 -- When more than three tables from Oracle BI EE are inserted into a worksheet, the cell positions of some tables are not maintained.
- 20912635 -- Column order is not maintained in Smart View 11.1.2.5.200 after the BI Answers table is modified and a new column is inserted between two existing columns.

**Planning**

- 14805911, 17250666 -- Performance may be very slow when launching the User Preferences dialog box from a Planning application in the Smart View Panel, and selecting members for user variables in Smart View.
- 20074859 -- The Member Name Display option is not displaying aliases correctly in Planning ad hoc and forms.
- 20354913 -- In Planning forms, changes to the page dimension do not carry over to the ad hoc grid after clicking Analyze. This fix requires Planning in Oracle Planning and Budgeting Cloud Service 15.08.77 or higher.
- 20557471 -- Planning members containing numbers only but defined as text, when modified in Smart View, save the decimal point in the application. As a result, the tooltip shows the member as a value with a decimal point and zeros; for example, 2013 shows as 2013.0000.
- 20557689 -- Unable to edit in the Manage Approvals dialog box when the Task List panel is minimized.
- 20764410 -- The VBA function, HypIsSmartViewContentPresent, returns incorrect content type if ad hoc analysis is invoked from the Smart View Panel when a Planning form is already open.
- 20782234 -- An Essbase calculation script created for Planning is displayed as “Rule Set” type in Business Rules in Smart View instead of type “script.”
- 21034178 -- In the Manage Approvals dialog box in Smart View, the names of the scenarios with a large number of characters gets truncated.
- 21359416 -- When using Supporting Details for Planning in Smart View, it is not possible to input a ‘0’ unless the cell is active.
- 21376478 -- The Search function for member selection is not working in Smart View for Business Rules Runtime Prompt.
Known Issues

Subtopics

- Installation
- General
- Disclosure Management
- Enterprise Performance Reporting
- Essbase
- Financial Management
- Financial Reporting
- Oracle BI EE
- Planning
- Reporting and Analysis

The following are the noteworthy known issues of this release.

Installation

- 14233719 -- If you are upgrading to this release from a Smart View PSE release, Oracle recommends that you first uninstall the PSE release and then install this release.
- 14648478 -- The Smart View installer does not fully support bidirectional (BiDi) languages. This can result in installer screens containing formatting errors such as misaligned text and icons. The installer can be used, however, and the installed Smart View product will display correctly in BiDi languages.
- 17206029, 21156027 -- After installing Smart View and launching Excel for the first time, you may get an error message similar to the following: “Unable to set the installed property of the add-in class.”

Workarounds: Enable the Smart View Excel add-in using one of the following methods:

Trust Center Method

1. Perform the task appropriate for your Office version:
   - 2013 and 2010: Go to File, then Options, and then Trust Center.
   - 2007: Click the Office button in the top left corner of Excel, then select Excel Options, and then Trust Center.
2. Click the Trust Center Settings button.
3. In the left pane, select Trusted Locations.
4. Click Add new location to launch the Microsoft Office Trusted Location dialog box.
5. In Path, enter:
   C:\Oracle
6. Click OK.
7. Click OK to close the Trust Center, and then click OK to close Excel Options.
COM Add-ins Method:

1. Perform the task appropriate for your Office version:
   - 2013 and 2010: Go to File, then Options, and then Add-ins.
   - 2007: Click the Office button in the top left corner of Excel, then select Excel Options, and then Add-ins.

2. From Manage, select COM Add-ins, and then Go.

3. In COM Add-ins, select the check box to enable the Oracle Smart View for Office add-in, and click OK.

- 17662148 -- On 64-bit operating systems, the Smart View silent install does not complete successfully for non-admin users.
- 18038604 -- When using the Check for updates link on the Extensions page of the Smart View Options dialog box, all Microsoft Office applications must then be closed to install any applicable extension updates.

**General**

- 9315130 -- Microsoft security update KB969604 for Office 2007 breaks Smart View functionality in Word. See Microsoft documentation for information about fixing this problem.
- 9691355 -- When you delete a worksheet containing a reporting object from the Report Designer, Excel may terminate abruptly. This is a Microsoft issue.
- 11934177, 12569072, 18057207 -- 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 Excel option, Transition navigation keys, is enabled. For example:
  - In Excel, copy/paste, macros, automation API calls do not work correctly.
  - In the Planning Admin extension, member formula formatting in the Smart View Dimension Editor does not display correctly; formulas have incorrect syntax when submitted to Planning.

In order to ensure the best performance possible, Smart View requires the following:

- The Excel option, Transition navigation keys, must be cleared.
- The Smart View option, Improve Metadata Storage, must be enabled (by default, this option is enabled).

- 13987451 -- For larger workbooks, a “not enough resources” error may occur.

**Workarounds:**

- Break up your workbook into smaller workbooks.
- Upgrading to Office 64-bit may resolve the issue.

- 14494179 -- Zooming out after performing a zoom in can leave blank rows on the worksheet.
Workaround: This is not a specific Smart View issue but may be related to excess formatting not being removed by Excel. Oracle recommends trying the following Microsoft workarounds:

- Reset the last cell in Excel
- Download and use the Microsoft Excel Excess Formatting Cleaner Add-in

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 against Firefox 17.x 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.

17263827, 17636796, 17667907, 20648759 -- 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 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.
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.

20364435 -- After pasting dynamic data points in Word, then clicking the **Manage POV** button and changing the POV member selection for one or more dimensions, the selections are not retained upon clicking **Close**.

20866653 -- Launching Smart View from a web browser does not work unless Excel is already open.

20958232 -- In Planning and Financial Management forms, after copying a cell, only a single paste is allowed. Pasting into subsequent cells is not supported.

**Workaround:** After pasting the cell once, you must copy the cell again in order to paste it into another cell.

**Disclosure Management**

14275486 -- When Oracle Hyperion 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 User's Guide*, “Administering Extension Installations and Updates” topics.

**Enterprise Performance Reporting**

See *Enterprise Performance Reporting Cloud Service Known Issues* on the Oracle Help Center for the complete list of Oracle Enterprise Performance Reporting Cloud Service 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.

12890030 -- If you change alias tables, members that you drag from the POV toolbar to the grid may be lost.
- 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 for a very short time in the sheet column and then are converted to a comment column. All calculated values are lost either automatically or by performing a Refresh.

  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.

- 19134780 -- Connection information for multiple-grid sheets cannot be updated using VBA.

- 19181853, 19335608 -- Excel memory use increases with each Refresh operation on function-only worksheets and certain ad hoc reports.

- 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.

**Financial Management**

- 16451623 -- Chart data is not properly updated upon Refresh if the data for the current intersection is **#Invalid**.

  **Workaround:** Change the slider or POV to a valid data point that displays different data, and then perform a Refresh. The chart is properly updated.

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

- 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 “e” 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 **HMF 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 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 the **Entity Details**, the **View, Rows** functionality is not available from Smart View. This functionality is 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.

• 20987930 -- Ampersands (&) are reserved characters and, when used in journal names, do not display properly in the list of journals in the **Manage Journals** dialog box in Smart View. For example, if a single ampersand is used in a journal name, then no ampersand is displayed in the name in **Manage Journals**; if two consecutive ampersands are used, then a single ampersand is displayed in the name in **Manage Journals**.

  Once the journal is opened in Smart View, the name displays correctly. The name also displays correctly in the Financial Management web interface.

### 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.
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 BI 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.

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.
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 Planning.

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

  For example, use:  
  
  ```plaintext
  =FVSCHEDULE(C10,B15:B17)
  ```

  Do not use:  
  
  ```plaintext
  =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 Oracle Hyperion 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.

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.

• 1387551 -- 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 11.1.2.5.500 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*.

- **20417037, 20564104, 20696893** -- In Office 2013, flickering and screen movements occur in the following situations:
  - Refreshing a composite web form using the **Refresh All** command causes the POV toolbar to flicker and shift up and down.
  - Opening a web form that has a page drop-down.
  - Moving between simple forms on multiple sheets or between composite forms.

To reduce flickering issues, refer to the topic, “Flickering Issues on Office 2013 32-bit and 64-bit.” in the *Oracle Smart View for Office Installation and Configuration Guide*, “Tips and Troubleshooting.”

- **21038932** -- Smart View performance is slow in Excel 2013 when compared to earlier versions of Excel. Microsoft is working on a fix to Excel 2013. Until the fix is available from Microsoft, you can 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, 21489132** -- In some cases, third-party software that automates the Excel process, such as exporting to Excel, may cause a conflict with Smart View and, in some cases cause Excel to terminate abnormally. To avoid these cases, you may enable “DisableInAutomation” by adding a key to the Windows Registry. To do this, create the Options key and DisableInAutomation key value as follows:
  - **Key Name:**
    ```plaintext
    [HKEY_CURRENT_USER\Software\Oracle\SmartView\Options]
    ```
  - **Key Value:**
    ```plaintext
    "DisableInAutomation"=dword:00000001
    ```

To create and update the registry key, Options:

1. Click **Start**, click **Run**, type `regedit` in the **Open** box, and then click **OK**.
2. Locate and then select the following registry subkey:
   ```plaintext
   HKEY_CURRENT_USER\Software\Oracle\SmartView\Options\:
   ```
3. From the **Edit** menu, select **New**, and then select **Key**.
4. Type Options, and then press Enter.
5. From the Edit menu, select New, and then select DWORD Value.
6. Type DisableInAutomation, and then press Enter.
7. In the Details pane, right-click DisableInAutomation, and then click Modify.
8. In the Value data box, type 00000001, and then click OK.

   **Note:** If a zero value is entered, this option is disabled.
9. Exit Registry Editor.

### Documentation Updates

**Subtopics**

- Accessing EPM System Product Documentation
- Online Help in Internet Explorer
- Copying and Pasting Code Snippets from PDFs
- Unsupported Feature Appears in Smart View Documentation
- Online Help Search in Internet Explorer
- Drill State Display of Oracle BI EE Columns in Smart View
- Limited Chart Copy and Paste Support
- Using VBA Functions with Form-based Authentication
- New Free-Form Examples
- New VBA Functions
- Documentation Correction

### 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.


### Online Help in Internet Explorer

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

Unsupported Feature Appears in Smart View Documentation

In release 11.1.2.5.500, an unsupported feature appears in all non-English versions of the documentation and in some English versions. The feature is “Support for Essbase Calculations with Runtime Prompts.”

- In the *Oracle Smart View for Office New Features* guide, the feature description entitled “Support for Essbase Calculations with Runtime Prompts” is not supported and should be ignored.

  References to this feature appear in the initial release of the 11.1.2.5.500 versions of the guide, both English and non-English.

  The feature no longer appears in the English version of the *Oracle Smart View for Office New Features* starting with the October 2015 update.

- In the *Oracle Smart View for Office User’s Guide*, “Calculating Data in Essbase” topic, references to running calculation scripts with runtime prompts should be ignored.

  References to this feature appear in:

  - All 11.1.2.5.500 versions of the non-English User's Guide and Help.
  - The initial 11.1.2.5.500 and September 2015 update versions of the English User’s Guide and Help.

    The feature no longer appears in the English version of the *Oracle Smart View for Office User’s Guide* starting with the October 2015 update.

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.

Drill State Display of Oracle BI EE Columns in Smart View

Drill state information related to hierarchy columns is stored in the view definition. When a table view or pivot table view is inserted as an Excel Table view or Excel Pivot Table view
respectively, these formats use the column information in the criteria definition only; they do not use the view definition information. Thus, drill state information cannot be displayed in Excel Table and Excel Pivot Table views inserted into Oracle Smart View for Office. Oracle recommends using other formats (such as the regular table view or the regular pivot table view) to show this information when views are drilled on hierarchical columns.

**Limited Chart Copy and Paste Support**

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

**Using VBA Functions with Form-based Authentication**

16842621 -- When using VBA for form-based authentication, for example, in Oracle Planning and Budgeting Cloud Service, you must use the HypUIConnect VBA function to connect to an existing private connection. HypUIConnect() will launch the user authentication form and you’ll then enter the user name, password, and domain to log in, after which you can use other VBA functions.

For example, to open a form using VBA, you can use this code:

Sub Example_HypConnect()
    Dim DimList() As Variant
    Dim MemList() As Variant
    x = HypUIConnect(Empty, UserName, Password, "Private Conn Name")
    x = HypSetActiveConnection("Private Conn Name")
    sts = HypOpenForm(Empty, "/Forms/Plan", "Actual vs Plan", DimList, MemList)
End Sub

**New Free-Form Examples**

20014602 -- The Oracle Smart View for Office User’s Guide has been updated with new examples for simple free-form grids for Essbase. To see the new examples, navigate to the “Free-Form Mode” chapter, then “Free-Form Grid Examples,” then “Simple Grids.” Here, you will find a new subheading entitled “Simple Grids in Essbase” with new examples and explanatory text about the changes in free-form for Oracle Essbase since the 11.1.2.1.102 release.

**New VBA Functions**

This release introduces two new VBA functions. For complete descriptions of these new functions, see the Oracle Smart View for Office Developer’s Guide.

- **HypModifyConnection**

21200229 -- A VBA function for changing the connection URL for all sheets of an Excel workbook was not available. To resolve this issue, a new function is added in this release, HypModifyConnection.
HypModifyRangeGridName

21230557 -- A VBA function for changing range names was not available. To resolve this issue, a new function is added in this release, HypModifyRangeGridName.

Documentation Correction

In *Oracle Smart View for Office User’s Guide*, “Sheet Information Support By Provider” topics, each of the items in the “Functions (HsGetVal, HsGetSheetInfo)” column for all providers should be marked “No”.

Documentation Feedback

Send feedback on product documentation to the following email address:

EPMdoc ww@oracle.com

Follow EPM Information Development on these social media sites:

- YouTube - http://www.youtube.com/user/OracleEPMWebcasts
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- Facebook - https://www.facebook.com/pages/Hyperion-EPM-Info/102682103112642
- LinkedIn - http://www.linkedin.com/groups?home=&gid=3127051&trk=anet_ug_hm

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.