ORACLE® SMART VIEW FOR OFFICE
Release 11.1.2.5.500

New Features

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Subtopics

- New Smart Forms for Saving Client-side Calculations
- New Oracle Journals Extension for Financial Management

New Smart Forms for Saving Client-side Calculations

The Excel formulas and functions that you add to ad hoc grids in Oracle Smart View for Office can now be saved to Oracle Planning and Budgeting Cloud Service in Smart Forms.

Note: Smart Form functionality is available for ad hoc grids created from Oracle Planning and Budgeting Cloud Service. Check with your service administrator about the availability of Smart Forms in your service.

In Smart View, an Oracle Planning and Budgeting Cloud Service user can create an ad hoc grid, add Excel formulas or functions to the grid, and then save the grid, including the formulas and functions, to Oracle Planning and Budgeting Cloud Service as a Smart Form.

The formulas and functions, or business calculations, can be executed at runtime in either Smart View or the Oracle Planning and Budgeting Cloud Service web interface, without adding members to Oracle Planning and Budgeting Cloud Service metadata. When the Smart Form is opened from Smart View, the business calculations are executed completely in the Smart View client, leveraging the native Excel calculation engine, without a round trip to the Oracle Planning and Budgeting Cloud Service. Business calculations are supported in both Smart View and the Oracle Smart View for Office User’s Guide web interface.

The Smart Form, with its calculations and grid labels, must be created in Smart View. Grid labels provide placeholders in a grid for entering the business calculations for corresponding data cell intersections. Smart Forms support formulas and functions for rows and columns at the cell level.

For more information, see the “Smart Forms” chapter in the Oracle Smart View for Office User’s Guide.

New Oracle Journals Extension for Financial Management

Oracle Journals is a new Smart View extension that supports a subset of the Journals functionality found in the Oracle Hyperion Financial Management web interface.

Note: The Oracle Journals 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.
With the Oracle Journals for Financial Management extension in Smart View, you can perform these journal tasks:

- Open a journal and view its properties, such as Status, Type, Balance Type, Group, and Class
- Create a new blank journal or create a journal using a standard or recurring template
- Create a journal from data grids or data forms opened in Excel using the right-click option in the grid or form, or the Create Journal command in the ribbon
- Create an ad hoc query from within a journal.
- Edit and save journals
- Submit, Unsubmit, Approve, Reject, Post, Unpost, and Delete journals
- Open an Entity Detail Report from data grids or data forms, and from an Entity Detail report, click on a journal to drill down for further details

For more information, see the “Oracle Journals” chapter in the Oracle Smart View for Office User’s Guide.

Features Introduced in Release 11.1.2.5.410

New Extension for Oracle Enterprise Performance Reporting Cloud Service

This release introduces the Oracle Enterprise Performance Reporting Cloud Service extension for Smart View. With the Oracle Enterprise Performance Reporting Cloud Service extension, you use familiar Microsoft Office tools to access and work with data in Oracle Enterprise Performance Reporting Cloud Service.

Oracle Enterprise Performance Reporting Cloud Service in Smart View enables you and your colleagues to work in a collaborative environment with Word documents containing refreshable data copied from Smart View. With its clearly defined assignments and tasks, the Oracle Enterprise Performance Reporting Cloud Service workflow organizes input from many contributors in one document. Some tasks are performed in the Oracle Enterprise Performance Reporting Cloud Service web interface, and others are completed in Smart View.

With Oracle Enterprise Performance Reporting Cloud Service:

- Use the web interface to assemble a set of documents, called doclets, into a structure called a report package.
- Assign user access and responsibilities, as well as timelines and due dates, in the web interface for the authoring, review, and approval of each doclet in the report package.
- Use Smart View to author doclet contents directly in Microsoft Word.

You can work with doclets in Smart View while connected to Oracle Enterprise Performance Reporting Cloud Service, or you can download doclets and work with them locally.
Leverage Smart View’s ability to access various data sources and include individual data points or formatted reports within the doclet.

You can retrieve data from Oracle Enterprise Performance Reporting Cloud Service data sources and other Oracle Enterprise Performance Management System on-premises and cloud data sources.

Collaboratively review and comment on assigned review instances either on the web interface or in Smart View.

Sign off on the entire report package either on the web interface or in Smart View.

Finalize the report package in the web interface.

When you work with the doclets in an Oracle Enterprise Performance Reporting Cloud Service report package, you can use Oracle Smart View for Office to copy and paste data from Oracle Enterprise Performance Reporting Cloud Service data sources, other Oracle Enterprise Performance Management System data sources, including on-premises and cloud data sources, and Oracle Business Intelligence Enterprise Edition data sources. For example, you can incorporate data from Oracle Essbase and Oracle Planning and Budgeting Cloud Service in the same doclet. A doclet in a report package in Word may contain a profit and loss statement that was created from an Oracle Essbase source along with an income statement report created from an Oracle Hyperion Planning source. The data points for the areas that you copy are retained in Word, so you can refresh the doclet to keep the data up to date.

See the Oracle Enterprise Performance Reporting Cloud Service documentation on the Oracle Help Center for complete descriptions of Oracle Enterprise Performance Reporting Cloud Service, including overviews, and installation and procedural information.

**New Features Introduced in Earlier Releases**

Use the Cumulative Feature Overview tool to create reports of new features added in prior 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