



ORACLE® SMART VIEW FOR OFFICE

Release 11.1.2.5.720

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 11.1.2.5.710](#)

This section includes new features in Release 11.1.2.5.720. 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/?p=20620:1:0>

New Features in this Release

Subtopics

- [Improved MDX and Smart Query Management](#)
- [Cascade from Multiple Dimensions](#)
- [Business Rule Template Support](#)
- [New and Enhanced VBA Functions](#)
- [HsGetValue Accepts Additional Data Types](#)
- [Streamlined Extension Update Process](#)
- [New Option for Displaying or Suppressing Floating Toolbar in Forms](#)
- [Updated Look and Feel for User Preferences Dialog Box](#)
- [New Essbase Option for Preserving Comments and Unknown Members](#)
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- [New Row and Column Suppression Behavior for EPM Cloud](#)
- [Oracle Enterprise Performance Reporting Cloud 18.04 Features](#)
- [Oracle Enterprise Performance Reporting Cloud 18.06 Features](#)

Improved MDX and Smart Query Management

For Oracle Essbase and Oracle Analytics Cloud - Essbase users, a new dialog, **Manage and Execute Queries**, provides an easy-to-use interface for creating, executing, saving, and managing MDX queries, and for executing and managing Smart Queries.

MDX users can perform the following tasks:

- Create a query

- Modify an existing query
- Save a query
- Modify a query's connection information
- Delete a query
- Execute a query

Smart Query users can modify connection information, as well as delete, and execute Smart Queries from the **Manage and Execute Queries** dialog.

Cascade from Multiple Dimensions

You can now create separate reports for any or all of the members of one or more dimensions in a report based on an ad hoc grid or Smart Slice query, and cascade these reports separately across the worksheets of an Excel workbook.

This feature applies to all data source providers.

In prior releases, you could work with members of only one dimension per cascade operation.

Business Rule Template Support

Smart View now supports business rules of the type, “Template.” When you select to calculate business rules in Smart View, you can now select from Template type rules. These rules generally run like any other business rule type; if required, you make member selections for any runtime prompts, and then launch the rule.

This feature applies to these Oracle Enterprise Performance Management Cloud services: Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Financial Consolidation and Close Cloud, and

New and Enhanced VBA Functions

New HypListDocuments Function

This release introduces the new HypListDocuments VBA function for Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Hyperion Planning, and Oracle Hyperion Financial Management. This function returns a list of artifacts in a specified path on a server or service instance. Artifacts include folders and forms.

For a complete description of the new function, see “HypListDocuments” in the *Oracle Smart View for Office Developer's Guide* or *Developing Applications for Oracle Smart View for Office*.

Enhanced HypConnect and HypUIConnect Functions

HypConnect and HypUIConnect now accept a connection string in for the format URL | SERVER | APP | CUBE for the vtFriendlyName parameter. Using the connection instead of a friendly name eliminates the need to create a connection with a friendly name (HypCreateConnection) before using either connection function. For details on using the

connection string with HypConnect and HypUIConnect, see the *Oracle Smart View for Office Developer's Guide*.

HsGetValue Accepts Additional Data Types

The HsGetValue function can now be used to get values from cells with Smart List, text, or date formats.

The enhanced HsGetValue function is supported for these EPM Cloud data sources: Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Financial Consolidation and Close Cloud, and Oracle Tax Reporting Cloud.

Streamlined Extension Update Process

During the extension update process in Smart View, you can now specify the servers or services from which to download extension updates. In prior releases, if you had data source connections to multiple workspace servers or cloud service instances, Smart View scanned all instances for extension updates, which could be time consuming. You can now shorten the process time by selecting the server or service instances from which to download extensions.

Note that for some cloud services, you can also download certain extensions directly from the web interface using the Download menu item. Refer to the documentation for your cloud services for more information.

New Option for Displaying or Suppressing Floating Toolbar in Forms

Select the new **Display floating toolbar on forms** option in the **Options** dialog, **Advanced** tab to display the floating toolbar on forms. When enabled, the floating toolbar gives you quick access to these form commands:

- Supporting Details
- Cell Comments
- Drill-through
- Attachments

Clear the option and the floating toolbar display is suppressed.

The floating toolbar option applies to forms when connected these EPM Cloud data sources: Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Financial Consolidation and Close Cloud, and Oracle Tax Reporting Cloud.

Updated Look and Feel for User Preferences Dialog Box

In this release, the **User Preferences** dialog box has a fresh look and feel, with the tabs moved to the left pane of the dialog.

The tabs and their respective content remain the same as in previous releases.

User Preferences are applicable to these data sources:

- EPM Cloud—Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Financial Consolidation and Close Cloud, and Oracle Tax Reporting Cloud
- Oracle Enterprise Performance Management System—Planning

New Essbase Option for Preserving Comments and Unknown Members

A new option in the **Data Options** tab, **Preserve Comments and Unknown Members**, allows Essbase and Oracle Analytics Cloud - Essbase cloud users to perform refresh and submit operations on sheets that contain unknown members and comments.

Smart View Support for Integrated Business Process Navigation Flows

Smart View now supports integrated business process navigation flows for these EPM Cloud services:

- Oracle Planning and Budgeting Cloud
- Oracle Enterprise Planning and Budgeting Cloud
- Oracle Financial Consolidation and Close Cloud
- Oracle Tax Reporting Cloud

Using integrated business process navigation flows, Service Administrators can set up shared connections that enable Smart View users to navigate across any combination of the supported EPM Cloud subscriptions.

Service Administrators: See *Administering Planning for Oracle Planning and Budgeting Cloud*, “Connecting Subscriptions in EPM Cloud” for information on setting up integrated business process navigation flows.

Smart View users: See these topics in the *Oracle Smart View for Office User's Guide* for information on connecting:

- “Shared Connections and Private Connections”
- “Connecting to Data Sources”
- “Creating Shared Connections”

New Row and Column Suppression Behavior for EPM Cloud

This feature applies to these EPM Cloud services:

- Oracle Planning and Budgeting Cloud
- Oracle Enterprise Planning and Budgeting Cloud
- Oracle Financial Consolidation and Close Cloud
- Oracle Tax Reporting Cloud

In web applications, your administrator can use the **Smart View Suppression Behavior** option to change suppression behavior when both the Smart View **No Data/Missing** and **Zero** suppression options for rows, or columns, or both are selected.

If the **Smart View Suppression Behavior** option in the web application is set to:

- **Legacy**—Only suppresses rows or columns containing either all **No Data/Missing** or all **Zeros**. Does not suppress rows or columns containing a combination of **No Data/Missing** and **Zeros**. For example, in Smart View, if both the **No Data/Missing** and **Zero** suppression options are selected for rows, and a row contains both zeroes and Missing labels, then the row is displayed; it is not suppressed.
- **Standard**—Suppresses rows or columns containing all **No Data/Missing** or all **Zeros**, or a combination of both. For example, in Smart View, if both the **No Data/Missing** and **Zero** suppression options are selected for columns, and a column contains both zeroes and Missing labels, then the column is suppressed; it is not displayed.

For more information:

- Administrators, see the administration documentation for your service. For example, in *Administering Planning for Oracle Planning and Budgeting Cloud*, see “Setting Form Grid Properties” and “Setting Application Defaults”.
- Smart View users, see “Data Options” and “Data Options Supported for Planning Forms and Ad Hoc” in the *Oracle Smart View for Office User's Guide*.

Oracle Enterprise Performance Reporting Cloud 18.04 Features

Subtopics

- [Support for PDF-based Report Packages](#)
- [View or Download Distributed Report Content Anytime](#)
- [Add Doclets and Sections from Smart View](#)
- [Edit Report Package, Doclet, and Section Properties from Smart View](#)
- [Enhanced Report Package Refresh](#)

Support for PDF-based Report Packages

Oracle Enterprise Performance Reporting Cloud now supports PDF-based report packages.

A PDF-based report package allows the collaborative development of a PDF report. Within PDF-based report packages, users can incorporate PDF files and Management Reports and merge them together into a single PDF report. Additionally, PDF-based report packages support reference and supplemental doclets.

PDF-based report packages are fully accessible within Smart View. Users can open their PDF-based report packages, download PDF doclet files, and author all Office-based reference or supplemental doclets. The Review and Sign Off phases are not supported within Smart View.

For more information, see:

- “Smart View and Oracle Enterprise Performance Reporting Cloud” in the *Oracle Smart View for Office User's Guide*
- *Oracle Enterprise Performance Reporting Cloud Creating and Managing Report Packages*
- *Oracle Enterprise Performance Reporting Cloud Reviewing and Signing Report Packages*

View or Download Distributed Report Content Anytime

Distributions enable a report package owner to send report content to stakeholders at any point in the report package development. As a recipient, depending on the options that the report package owner selects, you can view, download in native format, or download as PDF all of the report content that the report package owner assigns to you.

When a report package owner executes a distribution, you can now launch Smart View, open the report package, navigate to the new Distributions panel, and view or download the distribution in PDF format from Office.

Smart View users: See “Working with Distributions” in the *Oracle Smart View for Office User's Guide*.

Report package owners, refer to *Oracle Enterprise Performance Reporting Cloud Reviewing and Signing Report Packages* for information on setting up distributions.

Add Doclets and Sections from Smart View

Report package owners and other authorized users can now add doclets and sections to a report package directly from Smart View. Previously, you were required use the Oracle Enterprise Performance Reporting Cloud web interface to add doclets and section to a report package.

In Word-, PowerPoint-, and PDF-based report packages, you can add doclets, supplemental doclets, and reference doclets.

For Word documents, you can add an entire Word file. Or, you can add a selected portion of text in a Word file. The selected portion becomes the new doclet.

See “Adding Doclets to Report Packages” and “Adding Sections to Report Packages” in the *Oracle Smart View for Office User's Guide* for more information

Edit Report Package, Doclet, and Section Properties from Smart View

You can edit the name and description of selected report packages, doclets, and sections from Smart View.

For each artifact type, use the **Properties** link in the Action Panel or the **Inspect** button in the Performance Reporting ribbon to access the **Properties** dialog where you can make changes in the **Name** and **Description** fields.

See “Editing Report Package, Doclet, and Section Properties” in the *Oracle Smart View for Office User's Guide* for more information

Enhanced Report Package Refresh

The Report Package Refresh operation is enhanced to refresh content in reference doclets, as well as regular doclets.

Oracle Enterprise Performance Reporting Cloud 18.06 Features

Subtopics

- [Create New Report Package Structures in Smart View](#)
- [Assign Authors When Adding Doclets to Report Package Structures](#)
- [Validate Fonts in Excel Reference Doclets](#)

Create New Report Package Structures in Smart View

You can now easily create Word- or PowerPoint-based report package structures using Smart View.

With the **New Report Package** command, you can target a folder structure or a single file in your file system or network as the source of the new report package.

With either method—folder or file—you have the option to specify the doclet type (regular, supplemental, or reference) for each doclet that will be created before you import the files to create the report package.

After import, the basic structure and content of your report package is defined. You can further refine the structure within Smart View by adding more doclets or sections to the report package. Then, continue with the Oracle Enterprise Performance Reporting Cloud web interface to complete the report package definition (such as assigning responsibilities or defining development phases).

For more information, see “Creating Report Package Structures” in the *Oracle Smart View for Office User's Guide*.

Assign Authors When Adding Doclets to Report Package Structures

Starting in 18.06, you can assign authors to the doclets that you add to report package structures from Smart View.

If the author phase has been started for a report package, then, when you add doclets to it from Smart View, you have the option of assigning authors to the doclet.

You also have the option of excluding the doclet from the author phase.

If the author phase is not yet started or is already complete, then the doclet is automatically excluded, and the **Exclude from Author Phase** check box is disabled.

See “Adding Doclets to Report Package Structures” in the *Oracle Smart View for Office User's Guide* for information on assigning authors when adding doclets.

Validate Fonts in Excel Reference Doclets

The new **Font Validation** command, available on the Performance Reporting ribbon, provides a quick and easy way to confirm that the tables within your Excel reference doclets will render properly when inserted into a doclet as embedded content.

All fonts used in tables within your reference doclets must be uploaded to your Oracle Enterprise Performance Reporting Cloud service. If a font is not available within the service, the system uses a substitute font. This substitution can introduce significant visual differences when the content is either viewed online or inserted into another doclet.

With the **Font Validation** command, you are informed if any of the fonts sizes and styles used in the Excel reference doclet are not available in Oracle Enterprise Performance Reporting Cloud. You can then notify your service administrator to upload the missing font files. A message also notifies you if all font files are in sync.

For more information on using the **Font Validation** command, see “Validating Fonts in Reference Files” in the *Oracle Smart View for Office User's Guide*.

New Features in Release 11.1.2.5.710

Subtopics

- [Oracle Planning and Budgeting Cloud Features](#)
- [Oracle Analytics Cloud - Essbase Features](#)

Oracle Planning and Budgeting Cloud Features

Subtopics

- [Support for Valid Intersections in Oracle Planning and Budgeting Cloud](#)
- [Job Console Support for Additional Job Types](#)
- [Enhanced HsGetValue Function](#)

Support for Valid Intersections in Oracle Planning and Budgeting Cloud

Smart View now supports valid intersections in Oracle Planning and Budgeting Cloud applications.

Planning administrators can enable applications for valid intersections. In forms, valid intersections allow you to view or enter data only at predefined “valid” intersections.

For example, valid intersections might consist of a subset of Segment members which are valid only with a limited list of departments, or specific programs which are valid only for certain time periods.

Forms that are enabled for valid intersections can provide faster data entry and simplified plan validation resulting in higher quality Planning data, as well as easier maintenance of data entry forms. Data integrity is still maintained at “invalid” intersections.

See “Working with Valid Intersections” in the *Oracle Smart View for Office User's Guide* for more information.

Job Console Support for Additional Job Types

When filtering jobs in the Job Console in Smart View, additional job types and job statuses are now available.

In the *Oracle Smart View for Office User's Guide*, see “Monitoring Planning Job Status” for information on filtering jobs in the Job Console.

Enhanced HsGetValue Function

25205018 -- The HsGetValue function now supports the use of attribute dimensions and members with these EPM Cloud sources:

- Oracle Planning and Budgeting Cloud.
- Oracle Enterprise Planning and Budgeting Cloud
- Oracle Financial Consolidation and Close Cloud
- Oracle Tax Reporting Cloud

For information on using the HsGetValue function, see the “HsGetValue” topic in the *Oracle Smart View for Office User's Guide*.

Oracle Analytics Cloud - Essbase Features

Subtopics

- [Change the Solve Order of Members in a Calculation](#)
- [Calculation Trace](#)
- [Audit Trail](#)

Change the Solve Order of Members in a Calculation

When working with cubes in Oracle Analytics Cloud - Essbase, users can change the solve order of members in a selected POV. Solve order is a value which represents the order, or priority, of a member when a calculation is performed.

In Smart View, users select a data cell in a grid, and then select the **Cell Information** option on the Essbase ribbon to launch the **Data Cell Information** dialog box. All members associated with the POV of the selected data cell are listed, along with their calculation solve order and the operation performed on the cell POV. Users may edit the value in the **Solve Order** field, and then run the calculation.

See “Changing the Solve Order of a Selected POV” in the *Oracle Smart View for Office User's Guide* for more information.

Administrators configure this functionality in Oracle Analytics Cloud - Essbase.

Additionally, this feature requires the versions of Oracle Analytics Cloud - Essbase and Oracle Analytics Cloud that support this feature. Consult the “What’s New” document for Oracle Analytics Cloud for availability.

Calculation Trace

Detailed tracing information can be provided to users upon execution of a calculation script. When configured, the information is displayed in the **Calculation Result** dialog box.

The **Calculation Result** dialog box contains these details on the calculation that was executed when the script was launched:

- The cell being traced, referred to as the tracing cell
- The previous value of the tracing cell
- The dependent values of the tracing cell
- The new value
- The lines that were computed

Users can view the details in the dialog or copy and paste the information and save it in a favorite text editor for further review.

See “Calculating Data in Essbase” in the *Oracle Smart View for Office User's Guide* for information on using calculation trace.

Administrators configure this functionality in Oracle Analytics Cloud - Essbase.

Additionally, this feature requires the versions of Oracle Analytics Cloud - Essbase and Oracle Analytics Cloud that support this feature. Consult the “What’s New” document for Oracle Analytics Cloud for availability.

Audit Trail

In Smart View, data entry or input can be tracked when connected to Oracle Analytics Cloud - Essbase. For example, when **Audit Trail** is activated, then updating and submitting data in all writable cells in an ad hoc grid would be tracked and displayed as a list items of in the audit trail.

Smart View logs audit trail activity in a pane within the Smart View Panel. After connecting to a cube, you access the **Audit Trail** pane by selecting **Audit Trail** from the Action Panel.

For each user activity tracked, the following information is stored:

- User ID
- Date/Time
- Type of Operation
- Comments/Linked Reporting Objects (LRO)
- New Value
- Old Value
- POV Members

Only Date/Time, New Value, LRO, and POV are displayed in the Audit Trail pane. Selecting an log entry within **Audit Trail** provides additional information at the bottom of the pane. And you can export the details of the entry to view all available information for that entry.

You can also refresh the list of log entries in the **Audit Trail** pane, and launch a selected entry on a separate sheet to view the POV for that entry.

See “Tracking User Activity with Audit Trail” in the *Oracle Smart View for Office User's Guide* for more information.

Administrators configure this functionality in Oracle Analytics Cloud - Essbase.

Additionally, this feature requires the versions of Oracle Analytics Cloud - Essbase and Oracle Analytics Cloud that support this feature. Consult the “What’s New” document for Oracle Analytics Cloud for availability.

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 11.1.2.5.720 library on the Oracle Help Center.

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

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

Supported Platforms

Subtopics

- [Microsoft Windows Operating System Support](#)
- [Microsoft .NET Framework Support](#)
- [Microsoft Office Support](#)
- [Windows, Office, and Smart View Locale Settings](#)
- [Browser Support](#)
- [Mobile Device Support](#)
- [Financial Management Journals Extension Support](#)
- [Oracle Analytics Cloud 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 11.1.2.5.720 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)*:

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

- [Internet Explorer](#)
- [Firefox and 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>

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

Internet Explorer

Microsoft Internet Explorer is the only fully-supported browsers. For example, with Internet Explorer, 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, such as Oracle Hyperion Financial Data Quality Management, in Internet Explorer.

Firefox and Chrome

27495542 -- When working in a browser application, such as Oracle Planning and Budgeting Cloud, and using the **Open in Smart View** command in Mozilla Firefox or Google Chrome, rather than opening the file directly in Smart View, you are now prompted as follows:

- **Firefox:** You can select **Open** or **Save File**. Optionally, select **Do this automatically for files like this from now on** to save your choice.
- **Chrome:** You can select **Open** or **Show in folder**. Optionally, select **Always open files of this type** to always open Smart View files automatically.

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 extension 11.1.2.5.700+ (included with Smart View 11.1.2.5.700+)

Oracle Analytics Cloud Support

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

Oracle BI EE Support

- To use the Oracle Business Intelligence Enterprise Edition-related features in 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.
- 27148363 -- If you're using the Oracle BI EE extension, and upgrading from Smart View 11.1.2.5.500 or earlier to Smart View 11.1.2.5.510 or later, a complete uninstall of Smart View is required so that, when installing the later version of Smart View, the Oracle BI EE extension is properly installed:
 1. Close all Office applications.
 2. Uninstall Smart View from the Windows Control Panel.
 3. Install Smart View.

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

Note: After installation, a message appears the first time you start Smart View, notifying you that the Oracle BI EE extension is being installed. If you do not automatically see this message, then you can install the Oracle BI EE extension from the **Options** dialog, **Extensions** tab. See “Installing Extensions” in the *Oracle Smart View for Office User's Guide*.

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

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

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

Supported Languages

Information about supported languages for 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 11.1.2.5.720 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 11.1.2.5.720 from the following releases:

Table 1 Supported Paths to this Release

Release Upgrade Path From	To
11.1.2.x	11.1.2.5.720

Note: When upgrading from release 11.1.2.5.500 and earlier, Oracle recommends uninstalling Smart View before installing release 11.1.2.5.720.

Oracle BI EE extension users: When upgrading from 11.1.2.5.500 or earlier, Oracle requires uninstalling the Smart View before installing this release (see issue 27148363 in “Oracle BI EE Support” on page 15).

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

This section includes defects fixed in Release 11.1.2.5.720. 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

- 26744121 -- When choosing to route messages to the default location or a custom location, any existing files in that location are no longer deleted. (The **Route Message to File** option is in the **Options** dialog, **Advanced** tab, **Logging** group.)
- 26801750 -- In multiple-sheet workbooks, there is no longer any lag time in activating the selected sheet when navigating through the sheets.
- 27117271 -- When Smart View is installed on client machines by an administrator, end users can now launch the Smart View application from Firefox.
- 27134590 -- For users who do not have permission to connect to a particular application and cube, the HypConnect VBA function now correctly returns an error code instead of an error message.

Essbase

- 26778362 -- Formulas in page dimensions are no longer lost after a refresh, even when the sheet contains formulas outside the grid.
- 27017106 -- When working with cell drop-down POVs or the POV toolbar, you can now search more than 5,000 members in the Member Selector.

Financial Management

26841357 -- Excel is no longer unresponsive when trying to submit data from a web data entry form opened in Smart View.

Oracle Enterprise Performance Management Cloud

These fixes apply to Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Financial Consolidation and Close Cloud, and Oracle Tax Reporting Cloud.

- 21203167 -- Smart View copy and paste of data points containing Smart Lists, text, or dates is now supported, as noted in [“HsGetValue Accepts Additional Data Types”](#) on page 4.
- 26028732 -- Some performance improvements were made to reduce the time it takes to open a report and refresh it.
- 26773217 -- Forms that are read-only in the Planning web application no longer display as writable when opened in Smart View.

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

- 26835739 -- The message that appears when selecting to delete an application has been improved and now reads as follows:
`Are you sure you want to delete the application? This action cannot be undone.`
- 26941982 -- After opening a workbook and performing a refresh, the Keep Only operation now works as expected.
- 27343104 -- When connected to Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning and Budgeting Cloud 18.03 and later, an error message is no longer displayed and data is properly submitted when members are copied and pasted on the segment drop-down and data is changed in the data cells. If only members are changed, then the submit operation will revert members to their original state.

Oracle BI EE

- 26593734 -- A single quote (') is now correctly added to values that contain a number, but are not numeric values.

The single quote is added only to non-numeric values that begin with a number, such as:

```
'7 Megapixel Digital Camera
```

The single quote is *not* added to mixed numeric and text values that do not begin with a number, such as:

```
LCD 36X Standard
```

- 26935786 -- When connecting to Oracle BI EE 12.2.1.1 with single sign-on implemented, two superfluous dialogs no longer appear before connection is complete. The login sequence now behaves as expected.

Defects Fixed in Release 11.1.2.5.710

Subtopics

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

General

- 24483712 -- The Smart View add-in no longer causes Excel to terminate abnormally when closing.
- 25640912 -- When calling certain VBA functions in Smart View, the POV was displayed after switching to another Excel workbook. This occurred with HypRetrieve, HypRetrieveRange, and HypCreateRangeGrid.
- 25655219 -- On Windows Surface Pro, Smart View no longer stops responding when right-clicking in succession on members after several zoom in operations.
- 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 no longer required.
- 25801799 -- The Oracle Hyperion Financial Close Management module, Close Manager, is no longer available for selection from Excel, it is only available in Outlook.
- 25886581 -- In Oracle EPM Cloud, Smart View now supports single signon across Office applications for cloud services within the same domain.
- 25912764 -- The HypGetDimMbrsForDataCell function now runs correctly, instead of returning the -57 error code.
- 26190430 -- In an ad hoc sheet, an unknown exception no longer occurs when refreshing the sheet after placing a picture on the grid, and then adding a hyperlink to the picture.

Essbase

- 25979357 -- Submit on multiple grid worksheets works correctly now on cells with or without formulas. Ensure that you select the cell range or a single cell within the range before submitting.tbd
- 26038369 -- After performing ad hoc analysis and closing the active workbook, and then opening a new workbook, the Alt key was enabled and interacting with keyboard and mouse.

- 26041124 -- When using a Smart View VBA member function, such as HypFindMember or HypQuery Members, on an active sheet other than the sheet originally used to connect to Essbase, the function ran successfully, but all variables were set to empty.

Financial Management

26494718 -- In some cases, upon opening a saved Financial Management form, a member would appear twice in the POV, and clicking **Refresh** resulted in an “Encountered an improper argument” error.

Financial Reporting

- 22835235 -- In Smart View, when the Planning User Preferences Display Setting option, **Indentation of Members on Page**, is set to “Indent Level Zero Members Only,” hierarchy members in the form POV are now properly indented.
- 25851994 -- After upgrading Smart View, Oracle Hyperion Financial Reporting reports now import correctly.
- 25759305, 25910447 -- In PowerPoint, when a Financial Reporting report was refreshed, a new, empty slide was added to the presentation.

Oracle BI EE

25908011 -- While using the Japanese version of Smart View, inserting a table view or pivot table view into a worksheet, and then clicking Refresh, an error message was displayed stating that the view definition had changed on the server, even though there had been no change.

Oracle Enterprise Performance Reporting Cloud

- 25740683 -- Excel and Word no longer randomly terminate when uploading or checking in a doclet.
- 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 and Smart View 11.1.2.5.710.

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

- 25608917 -- In the POV, the drop-down member selection list now expands to accommodate long Japanese names.

- 25953848 -- In a POV where one of the members has a description, the alias table is set to **None**, and the Smart View **Member Name Display** option is set to **Member Name Only**, selecting a member from any other dimension caused the member with the description to revert to the description name in the POV.
- 26121991 -- Text-based Excel formulas in Planning forms were removed when performing a Refresh.
- 26242564 -- When an alias table other than the Default was selected, users could not run business rules.
- 26385389 --When accessing a task in Smart View, the Scenario and Version members that were specified when the task was defined are now set correctly.

Planning

25961379 -- When #NumericZero or #Missing was used as a replacement option, then copied data did not paste correctly to #Missing or 0 cells, and they reverted back to #Missing or 0 upon performing a Submit.

Known Issues

Subtopics

- [Installation and Uninstallation](#)
- [Extension 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 and Uninstallation

- 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.

- 26360410 -- When uninstalling and re-installing extensions from the Smart View **Options** dialog, **Extensions** tab, you may see an error message about unpacking.

For example, if uninstalling the Oracle BI EE extension, you may see this message:

```
Unpacking C:\users\\appdata\roaming\oracle\smartview\extensions\packages
\JBIPSPProviderInstaller.svext failed; Cannot create a file when that file already
exists.
```

Click **OK** in the message dialog and restart Office. The extension will install normally, and you can verify that the extension is enabled in the **Options** dialog, **Extensions** tab.

Extension Installation

Subtopics

- [Microsoft Internet Explorer](#)
- [Mozilla Firefox](#)
- [Other Extension Installation and Update Issues](#)

The issues noted in this section apply to Smart View extensions with the SVEXT file name extension.

Microsoft Internet Explorer

26365991-- When downloading an extension for Smart View from Microsoft Internet Explorer, the filename extension defaults to .ZIP instead of .SVEXT. This prevents you from being able to double-click to install the extension.

Workarounds:

- When Internet Explorer prompts you to save the file, choose **Save As**, change the **Type** to All Files, and then change the extension from .ZIP to .SVEXT. Then, double-click the downloaded file to install the extension.
- Change the security setting on your machine to allow Internet Explorer to install the .SVEXT directly. You must have sufficient security privileges to perform this task.
 1. Select **Start**, then **Control Panel**, and then **Internet Options**.
 2. In the **Internet Properties** dialog box, select the **Security** tab.
 3. On the **Security** tab, under **Select a zone to view or change security settings**, click **Local intranet**.
 4. Under **Security level for this zone**, click **Custom level**.
 5. In the **Security Settings - Local Intranet Zone** dialog box, scroll down to **Enable MIME Sniffing**.
 6. Select **Disable**, and then click **OK**.

7. Restart **Internet Explorer**, and try downloading and running the .SVEXT file directly from the browser.

Mozilla Firefox

26360056 -- Firefox prevents executable files from being copied and installed from the Internet. This results in a failure while attempting to install an SVEXT extension package with Firefox by selecting the “Open with” option.

Workaround: When prompted to save or run the file, choose the save option. Then, double-click the downloaded file to install the extension.

Other Extension Installation and Update Issues

27038312 -- After using Smart View and closing Excel, the Excel process persists. This can cause an issue when installing and updating extensions since you are required to exit and restart Excel.

Workaround: To ensure that extensions are installed and updated correctly, before restarting Excel, check the Windows Task Manager to verify if the Excel process is still running. If you see that Microsoft Excel is listed under **Process**, then select it and click the **Close Process** button, and then restart Excel.

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 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.
- 22548638 -- Smart View does not refresh data when multiple workbooks are open.
- 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.

- 25962029, 26620003, 26772733, 26781705, 26796966 -- Using the copy and paste functionality in Excel and then performing any Smart View operation (such as Refresh, Zoom In, or Submit) causes Smart View to stop responding in the following cases:
 - Copying a column to multiple columns if the column copied contains a Smart List or the database to which you're connected supports duplicate member names
 - Copying one Smart List cell to multiple cells
 - Copying one member cell to multiple cells if the database to which you're connected supports duplicate member names

Workarounds for Office 2010:

- While designing the ad hoc grid and copying and pasting columns or cells, ensure that the **Member Name Display** option is set to "Distinct Member Name Only." The **Member Name Display** option is in the **Member Options** tab of the **Options** dialog box.
- After pasting, save the workbook and reopen it, then perform the refresh.

Microsoft Fix for Office 2013 and 2016:

The copy and paste cases noted above work as expected in Office 2013 and 2016 if you have applied the updates described in the following Microsoft Knowledge Base (KB) articles:

- For Excel 2013:
<https://support.microsoft.com/en-us/help/3115455/august-9--2016--update-for-excel-2013-kb3115455>
- For Excel 2016:
<https://support.microsoft.com/en-us/help/3115438/august-9--2016--update-for-excel-2016-kb3115438>

If you are experiencing this issue on Excel 2013 or 2016, then you should install the appropriate KB update for your Excel version.

- 26922457 -- Cascading from a cascaded worksheet can result in an error if the any of the worksheets in the resulting cascade will have the same name as sheets already in the workbook.
- 27091106 -- In the **Select Cascade Members** dialog box, JAWS is not reading the "Number of cascaded sheets" label and the number when reciting the dialog content.

Workaround: In JAWS, go to **Utilities**, then **Settings**, then **User**, then **Screen echo**, and then select **Echo all text**.

- 27132649 -- On Windows 10, after installing Smart View and starting Excel for the first time, you are not able to select any other Excel ribbons or the Smart View ribbon, or select any menu items on the default Home ribbon.

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

- 27148137 -- After inserting several reporting objects into a PowerPoint presentation, then performing a Cascade Across and selecting members, and then attempting a Refresh All, entering slide show mode may cause the POV to disappear and PowerPoint to stop responding.
- 27180743, 27180878 -- When the Strategic Modeling extension is enabled, the following issues can occur:
 - 27180743 -- You cannot perform a Smart View copy and paste of form data.
 - 27180878 -- If you have opened a form as an ad hoc grid, you cannot add any other sheets to the workbook.

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.
- 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**.

- 26103534 -- When navigating within the doclet panel, the Action Panel menu items listed are relative to—and can change depending on—the item highlighted in the panel. If you are using the keyboard to navigate the doclet panel, note that even though you may have tabbed to a doclet panel item, it is not highlighted, or selected, until you press the space bar. Pressing the space bar highlights the item with a square border meaning that the item is now selected and in focus. Then, the Action Panel menu items will refresh and display relative to the item you've selected.

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 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.
- 25902276 -- In Excel worksheets, users are unable to scroll using the mouse wheel after connecting to Financial Management and opening a new worksheet.
- 26548782 -- On forms opened in Smart View from the web application, some calculated and read-only cells can be edited without an error message being displayed, although the changed data cannot be submitted.

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 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 FVSCCHEDULE function in Smart Forms, use cell references to existing data, rather than arrays of data.

For example, use:

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

Do not use:

```
=FVSCCHEDULE(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.

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- 23191769 -- When connected to Reporting Settings and selecting the **Import document as query ready** option in Smart View, the Financial Reporting report opens without the standard functionality available.
- 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.
- 25768064 -- Consider the following scenario: In PowerPoint, insert a chart and then, in the Document Contents pane, insert two reporting objects, a table and a POV. View the slide in slide show mode. After making a change to the POV and then exiting slide show mode, the Document Contents pane is blank.

Note: This issue affects these EPM Cloud services: Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Financial Consolidation and Close Cloud, and Oracle Tax Reporting Cloud.

Workaround: To bring back the items in the Document Contents pane, click the refresh button (a right arrow) next to the Document Contents drop-down menu at the top of the pane.

- 26524052 -- Starting in Smart View 11.1.2.5.701, forms open more slowly in Office 2016 than in previous Office versions.
- 27045859 -- If Internet Explorer is your the default browser, then the first time that you click a drill-through cell, you will see the message, “Unauthorized access” or “403, Forbidden”. This is expected. Invoke drill-through a second time and the operation will run successfully.

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

Subtopics

- [Smart View Diagnostics Tools](#)
- [Extension Installation from EPM Cloud and Message Window Focus](#)
- [Extension Updates and Automatic Updates](#)
- [Extension Updates and Office Applications Remaining Open](#)
- [Extension Updates and Outlook](#)
- [Internet Explorer Compatibility Mode and Financial Reporting](#)
- [Windows Flickering Issues](#)
- [Performance in Excel 2013](#)
- [Issues When Starting Excel in Automation Mode](#)
- [Duplicate Queries Slow to Refresh](#)
- [Web Launch Issue When Microsoft Explorer is run in Protected Mode](#)
- [Two-Way SSL and Problematic Certificates](#)
- [Unbalanced Loads in Provider Services Clustered Environments](#)
- [Improving Performance by Clearing the Retain Numeric Formatting Option](#)
- [Uninstallation Process Stops Responding](#)

This topic lists the most recent tips and troubleshooting topics. More topics are listed in the “Tips and troubleshooting” chapter in the *Oracle Smart View Installation and Configuration Guide*.

Click this link to access the “Tips and Troubleshooting” chapter:

https://docs.oracle.com/applications/smartview/720/SVNST/tips_and_troubleshooting.htm#SVNST-smart_view_install_book_76

The *Oracle Smart View Installation and Configuration Guide* is available in the Smart View 11.1.2.5.720 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.

Extension Installation from EPM Cloud and Message Window Focus

Installing extensions from supported Oracle Enterprise Performance Management Cloud services involves downloading an extension installer file and double-clicking it. When double-clicking an extension installer (.svext), a message window is displayed indicating the success or failure of the installation. The message window can sometimes lose focus and go behind another open window and can easily go unnoticed. This may lead to users trying to install the extension again, causing an error due to the previous open message window having a hold on the folder and files.

To clean up this extension installation issue:

1. Close all Office applications (Excel, Word, PowerPoint, Outlook).
2. Check the Windows task bar for an existing message window, and close it.
3. Remove prior extension installations:
 - a. Navigate to %AppData%\Oracle\SmartView\extensions\bin
 - b. Delete the extension folder.

For example, to delete the Oracle Enterprise Performance Reporting Cloud extension folder, delete the Oracle.SmartView.EPRCSExtension folder.
 - c. Delete the extension installation folder.

For example, to delete the Oracle Enterprise Performance Reporting Cloud extension installation folder, delete the EPRCSProviderInstaller folder.
4. Remove pending installations:
 - a. Navigate to %AppData%\Oracle\SmartView\extensions\update
 - b. Delete the pending extension installation folder.

For example, to delete the Oracle Enterprise Performance Reporting Cloud pending extension installation folder, then delete the Oracle.SmartView.EPRCSExtension folder.
5. Return to the location where you previously downloaded the extension installer file, and double-click it.

For example, to install the Oracle Enterprise Performance Reporting Cloud extension, double-click EPRCSProviderInstaller.svext.
6. Open Excel, Word, or PowerPoint, and in the Smart View ribbon, click **Options**, then select **Extensions**, and then verify that the extension you installed is listed.

Extension Updates and Automatic Updates

In general, if you're not using Automatic Updates or if you're not sure if they are needed, be sure to deselect the **Check for updates when Microsoft Office starts** option.

This option can be found in the **Options** dialog box. From the Smart View ribbon, go to **Options**, then **Extensions**, and then clear the **Check for updates when Microsoft Office starts** option.

Extension Updates and Office Applications Remaining Open

In order for extensions to be properly installed, removed, or updated, all Office applications must be shut down. When an Office application is reopened, updates for extensions are applied.

Sometimes, even though an Office application has been closed, it does not completely shut down, or does not shut down in a timely manner. Since an instance of Office is still running in this case, Smart View is unable to apply the extension updates correctly.

In this case, it may be necessary to open the Windows Task Manager and look for possible Office applications that may still be running. For Windows 10 users, navigate to the **Details** tab to find the correct process name corresponding to the Office applications. Other Windows version users, navigate to the **Processes** tab. Application names to look for are `Excel.exe`, `Outlook.exe`, `PowerPnt.exe`, and `Winword.exe`.

If any of these application names are displayed in the Task Manager, click on the name and end the process.

Once all Office applications are closed, reopen one of the applications so that Smart View can apply pending updates.

Extension Updates and Outlook

When applying extension updates, if any Office application is running, including Outlook, a message directs the user to close all Office applications. This includes Outlook, as well as Excel, Word, and PowerPoint. The following message may be displayed if attempting an extension update and one of the Office applications was not closed:

```
An extension that is flagged for removal is currently in use in folder: C:\Users
\
```

Often, the application left open is Outlook.

If Smart View is *not* needed for Outlook, it can be disabled to help avoid this issue during extension updates.

To disable Oracle Smart View for Office in Outlook:

1. In Outlook, go to the Smart View ribbon, then select **Options**, and then select **Advanced**.
2. Under **Display**, select the **Disable Smart View in Outlook** check box.
3. Click **OK**, and then close Outlook.
4. Restart Outlook and verify that the Smart View ribbon no longer appears.
5. Start a different Office application to continue the extension update process.

Internet Explorer Compatibility Mode and Financial Reporting

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*

Windows Flickering Issues

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.

Performance in Excel 2013

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*.

Issues When Starting Excel in Automation Mode

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.

Duplicate Queries Slow to Refresh

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*.

Web Launch Issue When Microsoft Explorer is run in Protected Mode

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.

Two-Way SSL and Problematic Certificates

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>
```

Unbalanced Loads in Provider Services Clustered Environments

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**.

Improving Performance by Clearing the Retain Numeric Formatting Option

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

Uninstallation Process Stops Responding

27471384 -- On supported Windows platforms, the Smart View uninstallation process may stop responding.

If you have experienced this issue, try the following:

1. In the Windows Task Manager, kill the process, **Microsoft Register Server** or **Windows Installer**.
Uninstall should continue successfully.
2. In the **Control Panel**, check **Programs and Features** to verify if **Oracle Smart View for Office** is listed.

If it is listed, select it, and then select **Uninstall** to try the uninstallation again.

Documentation Updates

Subtopics

- [Accessing EPM System Product Documentation](#)
- [Copying and Pasting Code Snippets from PDFs](#)
- [Online Help 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](#)
- [Working with VBA Functions in Oracle Planning and Budgeting Cloud and Oracle Analytics Cloud - Essbase Applications](#)
- [Creating Smart View Functions Manually for Oracle Analytics Cloud - Essbase](#)
- [Zoom In on Member Formula Cells](#)

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.

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
```

Note: Until the *Oracle Smart View for Office Developer's Guide* is updated for this new option constant, use the information in this documentation update as your reference. See the *Oracle Smart View for Office Developer's Guide* for information on using HypSetOption and HypGetOption functions with other option constants.

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 Smart View Copy and Paste.

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

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

Connection Functions

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

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

Other Functions

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

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

Creating Smart View Functions Manually for Oracle Analytics Cloud - Essbase

When creating Oracle Smart View for Office functions manually for Oracle Analytics Cloud - Essbase, you must use the private connection syntax. Only private connections are used for Oracle Analytics Cloud - Essbase; therefore, you must use the private connection syntax when creating functions manually for Oracle Analytics Cloud - Essbase.

In the *Oracle Smart View for Office User's Guide*, “Creating Functions Manually,” “Syntax Guidelines” topic, the description for the *ProviderType* parameter incorrectly states that the Essbase provider type applies to both Essbase and Oracle Analytics Cloud - Essbase.

The `Essbase` provider type applies only to Oracle Essbase.

Zoom In on Member Formula Cells

26671083 -- Zoom in on member formula cells is supported only when connected to a block storage database. Zoom in on member formula cells is *not* supported when connected to an aggregate storage database.

Documentation Feedback

Send feedback on product documentation to the following email address:

EPMdoc_ww@oracle.com

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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, 11.1.2.5.720

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