

# Oracle® Smart View for Office Installation and Configuration Guide



Release 11.1.2.5.810

F10364-03

March 2019

The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

ORACLE®

Oracle Smart View for Office Installation and Configuration Guide, Release 11.1.2.5.810

F10364-03

Copyright © 2004, 2019, Oracle and/or its affiliates. All rights reserved.

Primary Author: EPM Information Development Team

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

# Contents

## Documentation Accessibility

---

## Documentation Feedback

---

## 1 Welcome to Smart View Installation and Configuration

---

## 2 Installing Smart View

---

About Installing Smart View	2-1
Installation Guidelines	2-1
Installation and Windows Access Control Settings	2-2
Installer Language	2-3
Microsoft .NET Framework Support	2-3
BiDi Support in Installer	2-3
Upgrading from Smart View 11.1.1.3.x or Earlier	2-3
Oracle BI EE Extension Users: Upgrading from Smart View 11.1.2.5.500 or Earlier	2-3
Oracle BI EE Version Requirement for Multiple Connection and View Designer Features	2-4
Planning Offline Support	2-4
Installing from My Oracle Support or Oracle Technology Network	2-4
Installing Browser Add-ons	2-6
Installing by Autodeployment in EPM System	2-7
Server Setup	2-7
Client Installation	2-9
Installing from EPM Workspace	2-10
Workspace Setup	2-10
Client Installation	2-10
Installing from Oracle BI EE	2-11
Configuring the BI Home Page	2-11
Installing from the BI Home Page	2-12
Running Command Line or Silent Installations	2-13

Installing Smart View from the Command Line	2-14
Installing Smart View Silently	2-14
Installing Smart View Extensions Silently	2-15
Registry Settings to Reduce Timeouts and Flickering	2-15
Downloading Help for Local or Web Server Installation	2-16
Uninstalling Smart View	2-17

### 3 Administering Extension Installations and Updates

---

About Extension Installations and Updates	3-1
Configuring Manual Extension Updates	3-2
Manual Update XML Defined	3-4
Manual Update XML Example	3-6
Configuring Auto-Update Extensions	3-6
Auto-Update XML Defined	3-6
Auto-Update XML Example	3-7
Downloading Extensions From Microsoft Internet Explorer	3-8
Administering Extensions When Using Mozilla Firefox	3-8

### 4 Accessing Shared Connections from an XML File

---

About Accessing Shared Connections from an XML File	4-1
Setting Up the Shared Connections XML File	4-2
Connection File Syntax and Example	4-6
Connection File Syntax	4-7
Connection File Example	4-8

### 5 Installing and Configuring Help Locally or on a Web Server

---

About Installing Help Locally or on a Web Server	5-1
Setting Up Help Locally or on a Web Server	5-1
Optional Local Help Configuration via the Shared Connections XML File	5-4

### 6 Tips and Troubleshooting

---

Diagnostics Tools and Health Check	6-2
Installation and Languages	6-3
Windows, Office, and Smart View Locale Settings	6-3
Office .NET Installation Option Requirement	6-4
Microsoft Office 365 ProPlus Support	6-4
Installing in Program Files Folder on Windows 10	6-4
Installing a Pre 11.1.2.5.510 Version of Smart View	6-4

VBA Function Error for Oracle Analytics Cloud or Oracle BI EE	6-5
Disclosure Management Autodeployment Issue	6-5
Failure Connecting to Oracle Analytics Cloud	6-6
Smart View Ribbon Fails to Display After Non-Admin Installation on Windows 10	6-7
Error When First Launching Excel After Installing Smart View	6-8
Issues When Starting Excel in Automation Mode	6-9
Enabling and Disabling Smart View and Other Office Add-ins	6-10
Extension Installation from EPM Cloud and Message Window Focus	6-12
Extension Updates and Office Applications Remaining Open	6-13
Slowness with Extension Options Dialog Box	6-13
Office Slow to Start when Internet Connectivity is Not Available	6-13
Excel Process Stops Responding (Hangs) on Shut Down	6-14
Extension Updates and Outlook	6-14
Enabling the Smart View Extension for Firefox	6-15
Uninstallation Process Stops Responding	6-16
Excel Looks for HsTbar.xml File After Uninstall	6-16
Internet Explorer Compatibility View Settings for Financial Reporting	6-17
Web Launch with Internet Explorer in Protected Mode	6-18
Working with Custom HTML-based Login Forms	6-19
Browser Settings When Working with XML Files on HTTP Server	6-19
Flickering Issues on Office 2013 and Office 2016	6-20
Disable Window Transitions (DisableWindowTransitionsOnAddinTaskPanels)	6-20
Disable Office Animations (DisableAnimations)	6-21
Transition Navigation Keys Not Supported	6-21
Smart View HTTP Session Timeout	6-22
Duplicate Queries in Word Slow to Refresh	6-23
Issues with Dynamic Data Exchange Option in Excel	6-25
Performance and Memory Usage Considerations for Smart View with Excel	6-26
Unbalanced Loads in Provider Services Clustered Environments	6-27
Two-Way SSL and Problematic Certificates	6-27

# Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

## **Access to Oracle Support**

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

# Documentation Feedback

To provide feedback on this documentation, send email to [epmdoc\\_ww@oracle.com](mailto:epmdoc_ww@oracle.com), or, in an Oracle Help Center topic, click the Feedback button located beneath the Table of Contents (you may need to scroll down to see the button).

Follow EPM Information Development on these social media sites:

LinkedIn - [http://www.linkedin.com/groups?gid=3127051&goback=.gmp\\_3127051](http://www.linkedin.com/groups?gid=3127051&goback=.gmp_3127051)

Twitter - <http://twitter.com/hyperionepminfo>

Facebook - <http://www.facebook.com/pages/Hyperion-EPM-Info/102682103112642>

Google+ - [https://plus.google.com/106915048672979407731/  
#106915048672979407731/posts](https://plus.google.com/106915048672979407731/#106915048672979407731/posts)

YouTube - <https://www.youtube.com/oracleepminthecloud>

# 1

## Welcome to Smart View Installation and Configuration

This help includes topics on these subjects:

- Installing Oracle Smart View for Office
- Administering extensions
- Configuring shared connections in an XML file
- Configuring locally-installed help
- Troubleshooting tips
- Limitations

To find information in this help, click **Contents** or **Search** in the left frame.



# 2

## Installing Smart View

### Related Topics

- [About Installing Smart View](#)
- [Installation Guidelines](#)
- [Installing from My Oracle Support or Oracle Technology Network](#)
- [Installing Browser Add-ons](#)
- [Installing by Autodeployment in EPM System](#)
- [Installing from EPM Workspace](#)
- [Installing from Oracle BI EE](#)
- [Running Command Line or Silent Installations](#)
- [Downloading Help for Local or Web Server Installation](#)
- [Uninstalling Smart View](#)

## About Installing Smart View

Oracle Smart View for Office uses a single installer for 64-bit and 32-bit versions of Microsoft Office, starting with release 11.1.2.5.

Late-breaking information about the Smart View installation is provided in the *Oracle Smart View for Office Readme*. You should thoroughly review this chapter along with the information in the readme before installing Smart View.

Late-breaking information about installing client products in Oracle Enterprise Performance Management Cloud environments is provided in the *What's New* document for each service. Review this information thoroughly before installing client products.

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

## Installation Guidelines

### Related Topics

- [Installation and Windows Access Control Settings](#)
- [Installer Language](#)
- [Microsoft .NET Framework Support](#)
- [BiDi Support in Installer](#)
- [Upgrading from Smart View 11.1.1.3.x or Earlier](#)

- [Oracle BI EE Extension Users: Upgrading from Smart View 11.1.2.5.500 or Earlier](#)
- [Oracle BI EE Version Requirement for Multiple Connection and View Designer Features](#)
- [Planning Offline Support](#)

## Installation and Windows Access Control Settings

Starting with the 11.1.2.5.400 release, you can install Oracle Smart View for Office as a System user or as a non-admin user.

Windows User Access Control (UAC) settings can affect Smart View installation. For information on setting UAC, see the Microsoft Windows documentation.

Also, see [Tips and Troubleshooting](#) if you encounter issues related to installation.

**Table 2-1 Installation Guidelines for System, Admin, and Non-Admin Users**

Installation Context	Scenario	UAC-Enabled	Result
System user	SmartView.exe is launched by the Windows scheduler or PsExec	Not applicable	Smart View is installed on the machine level
Administrator	The user runs SmartView.exe with the "Run as Administrator" command or from an elevated command prompt	Depending on the UAC level, the user may need to go through the UAC UI sequence	Smart View is installed on the machine level
Non-admin user	The user installing Smart View may or may not be a member of the Administrators group. <b>Note:</b> Not supported on Windows server platforms.	No UAC interaction is expected.	Smart View is installed on the current user's level; other users will not be able to run Smart View

### Notes:

- This scenario is not supported: A user installs Smart View, and then, on the same machine, another user tries to install Smart View in the same location as the previous installation.
- After non-admin installations:
  - Launching Office applications with Smart View content from Internet Explorer will fail in protected mode.  
See [Web Launch with Internet Explorer in Protected Mode](#) to add trusted sites when Internet Explorer is run in protected mode.
  - The Smart View ribbon may fail to appear on Windows 10.  
See [Smart View Ribbon Fails to Display After Non-Admin Installation on Windows 10](#) for steps to take to display the ribbon.
- Upgrade in mixed installation context is not supported. For example, upgrading the previously-installed per-machine installation with a per-user one is not supported (Error 1925).

- Silent installations are not supported for non-admin users. When attempting a silent installation, the `/s` flag is ignored for non-admin users, causing the Smart View product installer to launch.
- Non-admin users are not authorized to install Smart View in the `C:\Program Files` or `C:\Program Files (x86)` folders.

## Installer Language

The installer is automatically displayed in the language set in the Format field of the Windows Region and Language dialog box in the Control Panel.

However, some messages, both on-screen and in the log file, cannot be translated and will appear in English.

For more information about language settings, see [Windows, Office, and Smart View Locale Settings](#).

## Microsoft .NET Framework Support

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

## BiDi Support in Installer

The Oracle Smart View for Office installer does not fully support bidirectional (BiDi) languages. This can result in installer screens containing formatting errors such as misaligned text and icons. The installer can be used, however, and the installed Smart View product will display correctly in BiDi languages.

## Upgrading from Smart View 11.1.1.3.x or Earlier

When upgrading from Oracle Smart View for Office release 11.1.1.3.x or earlier, Oracle recommends uninstalling Smart View before installing this release.

## Oracle BI EE Extension Users: Upgrading from Smart View 11.1.2.5.500 or Earlier

If you're using the Oracle BI EE extension, and upgrading from Oracle Smart View for Office 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:

1. Close all Office applications.
2. Uninstall Smart View from the Windows Control Panel.
3. Install Smart View.

See [Installing from My Oracle Support or Oracle Technology Network](#).

## Oracle BI EE Version Requirement for Multiple Connection and View Designer Features

To use the multiple connection and View Designer features described below, ensure that the Oracle Business Intelligence Enterprise Edition 11.1.1.7.140527 patch or higher is installed. 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 Oracle Smart View for Office 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.

## Planning Offline Support

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



### Note:

Planning Offline is supported with Oracle Hyperion Planning on-premises only. Planning Offline is not supported with Oracle Planning and Budgeting Cloud.

## Installing from My Oracle Support or Oracle Technology Network

To install Oracle Smart View for Office directly from My Oracle Support (MOS) or Oracle Technology Network (OTN):

1. Before you begin:
  - If you are upgrading to this release from an earlier Smart View release, Oracle recommends that you first uninstall the earlier release before installing this release.
  - Ensure that Microsoft .NET Framework 4.5 or higher is installed on the computer where you are installing Smart View.

Microsoft .NET Framework 4.5 or higher is required to install and use Smart View.

- Review the information in [Installation Guidelines](#).
2. Close all Microsoft Office applications.
3. Download the Smart View zip file from either MOS or OTN:
  - From MOS:  
<https://support.oracle.com/oip/faces/secure/km/DocumentDisplay.jspx?id=1923582.1>  
This Knowledge Article provides a link to the current version of Smart View.
  - From 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.
4. Unzip the file to a temporary location.
5. Double-click `SmartView.exe` to start the installation wizard.
6. Select a destination folder for Smart View, and then click **OK**.  
For new installations, Smart View is installed by default in:  
`C:\Oracle\SmartView`  
If you are upgrading an existing installation of Smart View, the installer defaults to the folder where Smart View was previously installed.
7. When installation is complete, click **OK**.  
The Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.

 **Note:**

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. If the extension is not already installed and it is not disabled, then it is installed the first time you start Office.

8. If your default browser is Mozilla Firefox or Google Chrome, a browser add-on is required. See [Installing Browser Add-ons](#) for more information.

 **Note:**

If you encounter issues related to installation and startup, see [Tips and Troubleshooting](#).

# Installing Browser Add-ons

You can use Oracle Smart View for Office to interact with web browser applications, such as Oracle Financial Consolidation and Close Cloud or Oracle Hyperion Planning, in two ways:

- Starting in a form or ad hoc grid in Smart View, use drill-through to launch an application web page in a browser
- Starting in a web application, launch a form or ad hoc grid in Smart View for Excel.

If your default browser is Microsoft Internet Explorer, drill-through and web launch are fully supported and require no additional add-on.

If your default browser is Mozilla Firefox or Google Chrome, you'll require a Smart View add-on for drill-through and web launch.

[Table 1](#) summarizes the browser add-on requirements.

**Table 2-2 Browser Add-on Requirements for Drill-Through and Web Launch**

Browser	Add-on Required?
Microsoft Internet Explorer	No
Mozilla Firefox	Yes
Google Chrome	Yes

For instructions on obtaining and installing the add-on for Firefox and Chrome, see:

- [Mozilla Firefox](#)
- [Google Chrome](#)

## Mozilla Firefox

To use Smart View 11.1.2.5.810 with Mozilla Firefox ESR 60 and later, you must install the Oracle Smart View for Office web extension for Firefox.

You can get the extension by searching on "smartview" on the [Firefox Add-ons](#) download site or by going directly to this link:

<https://addons.mozilla.org/en-US/firefox/addon/oracle-smart-view-for-office>

Click the **+ Add to Firefox** button and follow the prompts to add the extension.



### Note:

If you are using earlier versions of Firefox, then no add-on is required.

## Google Chrome

Oracle Planning and Budgeting Cloud 17.06+ and Oracle Enterprise Planning and Budgeting Cloud 17.06+ support interoperability with Google Chrome and Smart View 11.1.2.5.700+.

To use Google Chrome with Smart View, install the Oracle Smart View for Office web extension from the Chrome Web Store. You can get the extension by searching on "smartview" in the [Chrome Web Store](#) or by going directly to this link:

<https://chrome.google.com/webstore/detail/oracle-smart-view-for-off/cjbpfomjjhkmfkembnjejkhpihjnme>

Click the **+ Add to Chrome** button and follow the prompts to add the extension.

## Installing by Autodeployment in EPM System

These instructions are for upgrading from Oracle Smart View for Office 11.1.2.1.x and later only. If you are upgrading from Smart View 11.1.2.0.x or earlier, use the autodeployment instructions provided in the documentation for the specific release.

### Server Setup

To set up the server environment for autodeployment of Oracle Smart View for Office:

1. Enable autodeployment for your data provider as follows.
  - **Oracle Essbase:** Choose a method:
    - Use Administration Services Console (if available).
      - a. Connect to the Provider Server, select **Edit**, then **Properties**, then **Client Deployment**.
      - b. Choose either **Force Smart View client to upgrade** or **Warn Smart View client to upgrade**.
      - c. Select the **Apply Smart View client to upgrade** check box, and then click **Apply**.
    - Update `essbase.properties` as follows:
      - a. Navigate to `EPM_ORACLE_INSTANCE\bin\essbase.properties`.
      - b. Set either or both of these properties to true:

```
smartview.webservice.autodeploy.force=true
smartview.webservice.autodeploy.warn=true
```
  - **Oracle Hyperion Planning:**
    - a. Select **Administration**, then **Manage Properties**, and then **System Properties**.
    - b. Set these properties:

```
SMART_VIEW_FORCE_INSTALL=true
SMART_VIEW_DISPLAY_WARNING=true
```
  - **Oracle Hyperion Financial Management:** Autodeployment is enabled by default starting in Financial Management 11.1.2.4. To configure Financial Management to turn off messages about upgrading Smart View, complete the procedure in Oracle Support Document 1993603.1 on My Oracle Support:  
<https://mosemp.us.oracle.com/epmos/faces/DocumentDisplay?id=1993603.1>
  - **Oracle Hyperion Reporting and Analysis:** Autodeployment is automatic.

2. Make backup copies of your current `SmartView.exe` and `version.xml` before deploying the replacement files.
3. Download the Smart View zip file from either OTN or MOS, as described in [Installing from My Oracle Support or Oracle Technology Network](#).
4. Unzip the downloaded file to a temporary location.
5. Copy `SmartView.exe` and `version.xml` to the location of the Oracle Hyperion Enterprise Performance Management Workspace installation, typically:

```
C:\Oracle\Middleware\EPMSys11R1\common\epmstatic\wspace\SmartView
```

This is the `epmstatic` location specific to Smart View.

6. Depending on which version of Smart View your users are upgrading *from*, perform *either* [Option A](#) **OR** [Option B](#).
  - **Option A (Upgrading from 11.1.2.1.x, 11.1.2.2.x, or 11.1.2.3.x)**

If your users are upgrading from an installed Smart View version of 11.1.2.1.x, 11.1.2.2.x, or 11.1.2.3.x, open the `version.xml` file in the `epmstatic` location specific to Smart View (see step 5), and edit the value in the `installFile` tag to point to the location of the Smart View executable file (step 5) as follows:

```
<installFile>
  /epmstatic/wspace/SmartView/SmartView.exe
</installFile>
```

- **Option B (Upgrading from 11.1.2.5.000 or Later)**

If your users are upgrading from an installed Smart View version **11.1.2.5.000 or later**, choose only one of the following options and perform the tasks described:

- **OTN Option**

Do not modify the `version.xml` file in the `epmstatic` location specific to Smart View (step 5).

Your users will automatically be directed to the Smart View page on OTN, where they can download the installation zip file to their own machines, unzip the contents, and run the installer.

- **"epmstatic" Option**

Open the `version.xml` file in the `epmstatic` location specific to Smart View (see step 5) and edit the value in the `installFile` tag to point to the location of the Smart View executable file (step 5) as follows:

```
<installFile>
  /epmstatic/wspace/SmartView/SmartView.exe
</installFile>
```

- **Web App Server Option**

Post the `SmartView.exe` file to a web app server in your environment, and then modify the `version.xml` file to point to the fully-qualified URL.

- a. Copy only the `SmartView.exe` to the web app server where you will be hosting the file.
- b. Open the `version.xml` file in the `epmstatic` location specific to Smart View (see step 5), and edit the value in the `installFile` tag to point to



the fully-qualified URL where you are hosting the Smart View executable file (see [step a](#)); for example:

```
<installFile>
  http://webServerHost:webServerPort/pathToSmartViewExe/
  SmartView.exe
</installFile>
```

Your Smart View users can now proceed with [Client Installation](#).

## Client Installation

In the previous section, [Server Setup](#), if you chose the [OTN Option](#) in [Option B](#), then your users will be directed to OTN for the Oracle Smart View for Office download. In that case, your users should follow the instructions for OTN download and installation in [Installing from My Oracle Support or Oracle Technology Network](#).

If you did not choose the [epmstatic Option](#) or [Web App Server Option](#) in [Option B](#), then complete the following procedure.

To install the Smart View client:

1. In Smart View, select **Panel**.
2. Connect to a data source in one of the following ways:
  - Through a shared connection
  - Through a private connection with the following URL:
    - Oracle Essbase: `http://<server>:19000/aps/SmartView`
    - Oracle Hyperion Planning: `http://<server>:19000/HyperionPlanning/SmartView`
    - Oracle Hyperion Financial Management: `http://<server>:19000/hfmoofficeprovider/hfmoofficeprovider.aspx`
    - Oracle Hyperion Reporting and Analysis: `http://<server>:19000/raframework/browse/listxml`

### Note:

If you are using Reporting and Analysis release 11.1.2.1.000 or earlier, Smart View autodeployment will not work (10233672, 12870087).

3. When the message “New Smart View client version available” is displayed, select **Click here to Install**.
4. In the Internet Explorer browser that launches, in **File Download**, select **Run**.

### Note:

Internet Explorer will launch even if Firefox is your default browser.

5. If a Microsoft Excel security warning is displayed, select **Run**.

6. When prompted, confirm the upgrade; click **Yes**.
7. The installation wizard is displayed; click **OK**.  
The installer is automatically displayed in the language set in the Format field of the Windows Region and Language dialog box in the Control Panel.
8. If prompted, close all open Microsoft Office applications, and then click **OK**.
9. In the installation wizard, click **OK** and follow the prompts to install Smart View.
10. When installation is complete, click **OK**.  
The Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.
11. Open Excel.
12. On the Smart View ribbon, select the arrow next to **Help**, and then select **About**.
13. Verify the new version of Smart View.

## Installing from EPM Workspace

### Related Topics

- [Workspace Setup](#)
- [Client Installation](#)

## Workspace Setup

To set up the Workspace environment for the updated Oracle Smart View for Office installer:

1. Make backup copies of your current `SmartView.exe` and `version.xml` before deploying the replacement files.
2. Download the Smart View zip file from either OTN or MOS, as described in [Installing from My Oracle Support or Oracle Technology Network](#).
3. Unzip the downloaded file to a temporary location.
4. Copy `SmartView.exe` and `version.xml` to the location of the Oracle Hyperion Enterprise Performance Management Workspace installation, typically:

```
C:\Oracle\Middleware\EPMSys11R1\common\epmstatic\wspace\SmartView
```

## Client Installation

To install Oracle Smart View for Office from Oracle Hyperion Enterprise Performance Management Workspace:

1. In EPM Workspace, select **Tools**, then **Install**, and then **Smart View**.
2. In **File Download**, select **Run**.
3. If a Microsoft Excel security warning is displayed, select **Run**.
4. Select a destination folder for Smart View, and then click **OK**.

For new installations, Smart View is installed by default in:

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

If you are upgrading an existing installation of Smart View, the installer defaults to the folder where Smart View was previously installed.

5. When installation is complete, click **OK**.

The Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.

## Installing from Oracle BI EE

### Related Topics

- [Configuring the BI Home Page](#)
- [Installing from the BI Home Page](#)

## Configuring the BI Home Page

### Note:

Configuring a custom download link for the Smart View installer applies to Oracle Business Intelligence Enterprise Edition 11.1.1.7.1 and later versions, and might not be available in earlier versions.

Starting in Oracle BI EE release 11.1.1.9, the **Smart View for MS Office** link on the **Download BI Desktop Tools** drop-down list points to the Oracle Smart View for Office download on Oracle Technology Network.

If you do not want to direct your users to Oracle Technology Network, you can configure the **Smart View for MS Office** link to point to a custom download link for the Smart View installer. You can then ensure that the correct version of Smart View for your environment is always available to your users. Do this by adding the `SmartViewInstallerURL` element to `instanceconfig.xml`.

You can configure the download link point to a location where the `smartview.exe` resides; for example:

- An external URL
- An internal URL, such as internal web page or intranet location where the installation can start immediately
- A folder on a local server where the installation can start immediately

To configure a custom download link for the Smart View installer:

1. Open the `instanceconfig.xml` file for editing  
Refer to "Where Are Configuration Files Located?" in the *Oracle Fusion Middleware System Administrator's Guide for Oracle Business Intelligence Enterprise Edition*.
2. Locate the `CatalogPath` and `<DSN>AnalyticsWeb</DSN>` sections and add the `SmartViewInstallerURL` element after those sections.
3. Use the syntax in the following examples to add the `SmartViewInstallerURL` element.

#### Example for download from Oracle Technology Network:

```
<CatalogPath>/example/path/work/abc/instances/instance1/bifoundation/  
OracleBIPresentationServicesComponent/coreapplication_obips1/catalog/SampleApp</  
CatalogPath>  
<DSN>AnalyticsWeb</DSN>  
<SmartViewInstallerURL>http://www.oracle.com/technetwork/middleware/epm/  
downloads/smart-view-1112x-1939038.html</SmartViewInstallerURL>
```

#### Example for download from an intranet site:

```
<CatalogPath>/example/path/work/abc/instances/instance1/bifoundation/  
OracleBIPresentationServicesComponent/coreapplication_obips1/catalog/SampleApp</  
CatalogPath>  
<DSN>AnalyticsWeb</DSN> <SmartViewInstallerURL>http://myserver:8080/downloads/  
smartview.exe</SmartViewInstallerURL>
```

#### Example for download from an internal server:

```
<CatalogPath>/example/path/work/abc/instances/instance1/bifoundation/  
OracleBIPresentationServicesComponent/coreapplication_obips1/catalog/SampleApp</  
CatalogPath>  
<DSN>AnalyticsWeb</DSN> <SmartViewInstallerURL>\\myserver\downloads  
\smartview.exe</SmartViewInstallerURL>
```

4. Save your changes and close the file.
5. Restart the Oracle BI EE instance.

## Installing from the BI Home Page

To install Oracle Smart View for Office from Oracle Business Intelligence Home:

1. In the BI Home page, click the arrow next to **Download BI Desktop Tools**, and then select **Smart View for MS Office**.

If you are directed to the Smart View download page on Oracle Technology Network, then follow the procedure in [Installing from My Oracle Support or Oracle Technology Network](#). Otherwise, proceed with step 2.

2. Choose an option:
  - Click **Run** to run the installer directly.  
If the **User Account Control** dialog box is displayed, click **Yes**, and then continue to step 3.
  - Click **Save** to save the Smart View installer file to a directory to which you have access and from which you can run executable files.  
Open the folder where you saved the Smart View executable and double-click it to run it. Then continue to step 3.
3. Select the language to use for the installation wizard.
4. Click **Next**.
5. Follow the prompts in the wizard.
6. When installation is complete, click **Finish**.

The Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.

 **Note:**

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 you start Office if the Oracle BI EE extension is not already installed and it is not disabled.

## Running Command Line or Silent Installations

Oracle Smart View for Office can be installed from the command line. Additionally, administrators can enable silent installations—installations that do not require settings to be specified each time—for Smart View and Smart View extensions. The silent installation command can be included in scripts to automate installation.

 **Note:**

Silent installations are only supported for admin users.

Use the options in [Table 1](#) to install Smart View from the command line and for silent installations.

**Related Topics:**

- [Installing Smart View from the Command Line](#)
- [Installing Smart View Silently](#)
- [Installing Smart View Extensions Silently](#)
- [Registry Settings to Reduce Timeouts and Flickering](#)

**Table 2-3 Command Line Options for Smart View Installations**

Option	Usage
/v"command line options"	Specifies command line options to be passed to the Smart View MSI installer. For example, to specify the installation directory, use:  /v "INSTALLDIR=<path>"  To enable logging, use:  /v "l*v <log file path and name>"
/s	Runs the Smart View installer in silent mode.
/Office=64	Installs or uninstalls only the 64-bit version of Smart View
/Office=32	Installs or uninstalls only the 32-bit version of Smart View
/extensionupdatelist=	Path to UpdateList.xml

**Table 2-3 (Cont.) Command Line Options for Smart View Installations**

Option	Usage
/x	Uninstalls Smart View

**Before You Begin**

Before you begin, follow the procedure in [Installing from My Oracle Support or Oracle Technology Network](#) to download the Smart View installation zip file and unzip it to the folder you will be working in.

## Installing Smart View from the Command Line

To install Oracle Smart View for Office from the command line:

1. Open a command prompt.
2. Navigate to the directory of the Smart View installer.
3. Run the installation commands in [Table 1](#); for example:

- To install in the default directory, run:

```
SmartView.exe
```

- To install in another directory, run:

```
SmartView.exe /v" INSTALLDIR=<target path>"
```

For example:

```
SmartView.exe /v" INSTALLDIR=D:\SmartView"
```

- To specify the location of `UpdateList.xml`, run:

```
SmartView.exe /extensionupdatelist=<path to UpdateList.xml>
```

- To run an installation and log the installation sequence:

```
SmartView.exe /v" INSTALLDIR=D:\SmartView /L*v c:\install.log"
```

4. **Optional:** Run your organization-specific commands to deploy to your users the Windows Registry settings noted in [Registry Settings to Reduce Timeouts and Flickering](#).

## Installing Smart View Silently

The silent installer wrapper follows these rules:

- It passes the value of the `/v` parameter intact to the MSI.
- The `/s` flag is converted to `/qn` and passed to the MSI. There is no need to specify the `/qn` parameter if `/s` is already present in your script.
- Unless the `/v` parameter contains any `/q` specifier, the wrapper passes `/qb+` to the MSI.

To run silent installations:

1. Open a command prompt.

2. Navigate to the directory of the Oracle Smart View for Office installer.
3. Run the installation commands in [Table 1](#); for example:

- To install in the default directory, run:

```
SmartView.exe /s
```

- To install in another directory, run:

```
SmartView.exe /s /v" INSTALLDIR=<target path>"
```

For example:

```
SmartView.exe /s /v" INSTALLDIR=D:\SmartView"
```

- To specify the location of `UpdateList.xml`, run:

```
SmartView.exe /s /extensionupdatelist=<path to UpdateList.xml>
```

- To run a silent installation and log the installation sequence:

```
SmartView.exe /s /v" INSTALLDIR=D:\SmartView /L*v c:\install.log"
```

4. **Optional:** Run your organization-specific commands to deploy to your users the Windows Registry settings noted in [Registry Settings to Reduce Timeouts and Flickering](#).

## Installing Smart View Extensions Silently

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

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

For example, after a typical Oracle Smart View for Office installation, Smart View is installed on `C:\Oracle\SmartView`. In this installation, the extensions included with Smart View are located in `C:\Oracle\SmartView\extensions`. Using the command above, an admin can silently install the Oracle Journals extension using the following command:

```
svlaunch.exe /i C:\Oracle\SmartView\extensions\SVFMJournalInstaller.svext
```

After installation, the extension files are located on the user's machine here:

```
%APPDATA%\Oracle\SmartView\extensions\Bin
```

## Registry Settings to Reduce Timeouts and Flickering

Use your own organization-specific procedures to deploy these Windows Registry settings to your users. These settings can help to reduce timeouts and flickering in Oracle Smart View for Office.

### Timeout Settings

Configure these Registry settings to help reduce timeouts:

- ReceiveTimeout
- KeepAliveTimeout
- ServerInfoTimeout

See [Smart View HTTP Session Timeout](#) for information on these settings.

### Flickering Settings

Configure these Registry settings to help reduce flickering:

- DisableWindowTransitionsOnAddinTaskPanels
- DisableAnimations



#### Note:

Oracle recommends setting the registry key, `DisableWindowTransitionsOnAddinTaskPanels`, to reduce POV toolbar flickering. Consider rolling this out this setting to your users along with the Smart View install.

See [Flickering Issues on Office 2013 and Office 2016](#) for information on these settings.

## Downloading Help for Local or Web Server Installation

After installing Oracle Smart View for Office, the online help is retrieved from a URL hosted on the Oracle.com web site. This is the default behavior for Smart View, and no changes are required by users to launch help.

However, you may require that the help be installed locally or on a web server in your organization. Some examples for the need to access help from a location other than Oracle.com are:

- Help files must be installed on a local drive on an individual's computer for Section 508 accessibility purposes.
- Internet access limitations; for example, your users only have access to URLs on your organization's intranet.

To accommodate the above types of cases, a downloadable help zip file is posted on My Oracle Support as a patch to the current Smart View release.

The procedure below describes downloading the help zip file. Further instructions for installation and configuration are in the following guides:

- [Installing and Configuring Help Locally or on a Web Server](#) in this guide.
- *Oracle Smart View for Office Accessibility Guide*. See "Installing and Configuring Help Locally."

To download the Smart View help zip file from My Oracle Support (MOS):

1. Log in to MOS.
2. Select the **Patches & Updates** tab.

The **Patch Search** area is displayed at the right of the screen with the **Search** tab selected by default.

3. Under the **Number/Name or Bug Number (Simple)** heading, ensure that **Patch Name or Number** is selected in the drop-down list box.



4. In the **Patch Search** text box, type this Smart View patch number:

23206405

The **Patch Search** text box is to the right of the **Patch Name or Number** drop-down list box.

5. Click **Search**.
6. Download the patch zip file to a temporary directory.
7. To install and configure the help according to your requirements, follow the instructions in either of the following guides:
  - [Installing and Configuring Help Locally or on a Web Server](#) in this guide.
  - *Oracle Smart View for Office Accessibility Guide*. See "Installing and Configuring Help Locally."

## Uninstalling Smart View

This topic describes uninstalling Oracle Smart View for Office.

To uninstall extensions, see "Uninstalling Extensions" in the *Oracle Smart View for Office User's Guide*.

To uninstall Smart View:

1. Before you begin, close all Office applications.
2. Go to your Windows system **Control Panel** and navigate to **Uninstall or change a program**.
3. Locate and select the version of Smart View that applies to your installation:
  - **Oracle Smart View 32-bit for Office**
  - **Oracle Smart View 64-bit for Office**
4. Click **Uninstall**.

# 3

## Administering Extension Installations and Updates

The extension installation and update process described in this topic enables Oracle Smart View for Office end users to install, update, or uninstall extensions based on parameters set by the Smart View administrator in the manifest file, `UpdateList.xml`.

### About Extension Installations and Updates

#### Auto-Update versus Manual Update

In releases earlier than Oracle Smart View for Office 11.1.2.5.400, extensions were updated using the *Auto-Update* process. To update extensions with Auto-Update, Smart View end users could go to the **Extensions** tab of the **Options** dialog box and click the **Check for updates** link or select the **Check for updates when Microsoft Office starts** check box to initiate extension updates. For all extensions, if any updates were available, they were retrieved and installations were automatically initiated.

In release 11.1.2.5.400 and later, you can customize the extension update process so that Smart View end users can control when they install, update, and remove extensions. The Smart View administrator configures attributes in the `UpdateList.xml` manifest file to control the options available to the users. If the administrator does not configure these attributes in `UpdateList.xml`, extensions will continue to be updated using the existing Auto-Update process.

#### Types of Extensions

There are two types of extensions that can be installed on a Smart View client machine:

- **Provider extensions.** Extensions that are dependent on, or integrated with, Oracle components are *provider* extensions. Examples are the Disclosure Management and Oracle Hyperion Financial Reporting extensions. Provider extensions can be configured as required extensions.
- **Per-user extensions.** Extensions that are installed in the user's application data folder. These extensions may or may not be dependent on Oracle components. Additionally, per-user extensions can also be configured as required extensions.

The Smart View administrator configures the `UpdateList.xml` file to specify the list of provider and per-user extensions available to end users along with options for installing, updating, and removing them. Additionally, per-user extensions can also be configured to display an indicator for required extensions and does not force the installation. The Smart View end user then accesses the **Options** dialog box and installs, updates, or uninstalls the extensions that are available to him or her in the **Extensions** tab.

To configure provider and per-user extension installation, uninstallation, and updating, complete the procedure in [Configuring Manual Extension Updates](#).

If you do not want to make changes to the extension update process, you may refer to [Configuring Auto-Update Extensions](#) for information on the structure of the XML and examples, but you do not need to take any further action.

For instructions on installing, updating, and removing extensions in Smart View, end users can refer to the procedure topics in "Extensions" in the "Smart View Options" chapter in the *Oracle Smart View for Office User's Guide*.

### About the Oracle Journals for Financial Management Extension

The Oracle Journals extension is unique among Smart View extensions in that the extension installer file is included in the `extensions` folder of the Smart View installation. End users can install the Oracle Journals extension directly from the `extensions` folder of their Smart View installation.

Or, as administrator, you can control how your Smart View end users install the Oracle Journals extension, automatically or manually, via the **Extensions** page of the Smart View **Options** dialog box.

If you choose to set up automatic or manual installations of the Oracle Journals extension, you should install Smart View in a test environment first, then refer to the `UpdateList.xml` file, found in the `extensions` folder of your Smart View installation. Use the entry in this file as a guideline for the Oracle Journals entry you will add to the `UpdateList.xml` file, as described in [Configuring Manual Extension Updates](#).

## Configuring Manual Extension Updates

Auto-Update extensions in the `UpdateList.xml` manifest file can be configured so that the Oracle Smart View for Office end user can see the available extensions, including per-user extensions, and install them from the **Extensions** tab of the **Options** dialog box.

You can add two attributes, `visible` and `allowUninstall`, to the `UpdateList.xml` manifest file to change the behavior of the extensions from auto-update to manual update so that the extensions are displayed in the **Options** dialog box:

- `visible`—A value of "1" indicates that the extension will appear in the **Extensions** tab of the Smart View **Options** dialog and will NOT be part of the Auto-Update process.  
If the `visible` attribute is missing or the value is not "1", the extension is included in the Auto-Update process.
- `allowUninstall`—A value of "1" indicates that the user can initiate an uninstall through the **Extensions** tab of the **Options** dialog box using the **Remove** link.  
If the `allowUninstall` attribute is missing or the value is not "1", the user may not initiate an uninstall in the **Extensions** interface (the **Remove** link will not be there).

This procedure is optional. If you choose not to add the attributes to `UpdateList.xml`, extensions will continue to be updated as they were in releases earlier than 11.1.2.5.400. In pre-11.1.2.5.400 releases, users click the **Check for updates** link or select the **Check for updates when Microsoft Office starts** check box to initiate extension updates.

See [Manual Update XML Defined](#) and [Manual Update XML Example](#) for reference.

To add attributes to the `UpdateList.xml` manifest file for extensions:

1. Open the `UpdateList.xml` file for editing.

The manifest file is found in two locations:

- `epmstatic`:  
`http://server:port/epmstatic/smartview/Client/UpdateList.xml`
- The location pointed to by the `<extensionupdatelist>` tag in `C:\Oracle\SmartView\cfg\properties.xml`.

To populate the `<extensionupdatelist>` tag, you can either perform a command line installation, as described in [Running Command Line or Silent Installations](#), or manually update the tag in the `properties.xml` file.

 **Note:**

In `properties.xml`, if multiple URLs exist for an extension installer, Smart View checks all locations and installs from the location containing the latest version.

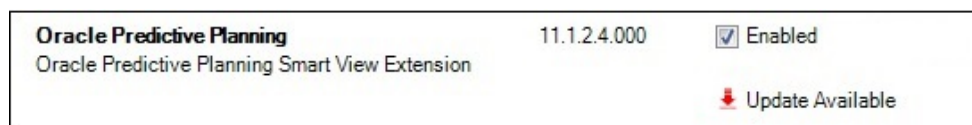

If multiple URLs exist for the same version of an extension installer, Smart View installs from the first URL in the list.

2. **Optional:** To display an extension in the **Extensions** tab of the **Options** dialog box, and exclude the extension from the Auto-Update process, add the `visible="1"` attribute to the XML for the extension; for example:

```
<update>
  version="11.1.2.3.500.021"
  extension id="Some.Unique.Id.That.Matches.Extension.Descriptor.Id"
  location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi"
  visible="1"
  allowUninstall="1">Oracle Disclosure Management
</extension>
```

[Figure 1](#) shows an example of an extension displayed in the **Extensions** tab.

**Figure 3-1 Extension as Displayed in the Extensions Tab**

3. **Optional:** To display the **Remove** button,  **Remove**, for an extension, add the `allowUninstall="1"` attribute to the XML for the extension; for example:

```
<update>
  version="11.1.2.3.500.021"
  extension id="A.Unique.Id.That.Matches.Extension.Descriptor.Id"
  location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi"
  visible="1"
  allowUninstall="1">Oracle Disclosure Management
</extension>
```

[Figure 2](#) shows an example of an extension displayed in the **Extensions** tab.

**Figure 3-2 Extension as Displayed in the Extensions Tab**



4. For each provider and per-user extension, repeat step 2 and step 3 according to your requirements.
5. **Optional:** To remove a single extension from the list of extensions available for Auto-Update in the `UpdateList.xml` file, use the alternative method of commenting out the extension with the `<!--` and `-->` characters; for example:

```
<!--
<extension>
location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi"
version="11.1.2.4.078" id="nnnnnnnn-nnnn-nnnn-nnnn-nnnnnnnnnnnn"> Oracle
Disclosure Management
</extension>
-->
```

You can also comment out the entire list of extensions if your goal is to exclude all extensions from the manual update process.

## Manual Update XML Defined

- `<update>`  
The root node. This is a tag.
- `<extension>`  
Parent node for `<extension>` attributes. This is a tag.  
Attributes of `<extension>` are:
  - `id`  
The extension identifier. The identifier must match the `SVExtensionDescriptor.GUID` defined in the extension. It does not need to be a GUID, it only needs to be unique. This name will appear in the Windows Registry. For this reason, Oracle recommends using readable identifiers; for example, `Oracle.Disclosure.Management`.
  - `format`  
A value of "1" indicates that the entry for the extension uses the manual update XML format introduced in Oracle Smart View for Office 11.1.2.5.400. This XML format supports more user interface features than the standard Auto-Update format.
  - `version`  
The version number of the extension. The version number must match exactly with the extension descriptor version in the extension assembly.
  - `svVersion`  
The Smart View version that the extension works with.
  - `visible`

Set this value to "1" to display the extension in the **Extensions** tab of the **Options** dialog box. When this is set to "1", the extension will NOT be part of the Auto-Update process.

– manualUpdate

Set this value to "1" if the user needs to close Excel for installation update. The update installer file will be downloaded and a message will be displayed indicating the required restart of Office. Also, the download folder will be opened.

– manualInstall

Set this value to "1" if the user needs to close Excel for installation. The installer file will be downloaded and a message will be displayed indicating the required restart of Office. The download folder will be opened.

– allowUninstall

Set this value to "1" to display the **Remove** button in the **Extensions** tab of the **Options** dialog box.

– type

The type of extension. Valid values are:

- \* 0 = optional extension
- \* 1 = provider extension
- \* 2 = Smart View client

– required

Set to display a "Required" or "Recommended" icon for the extension. No action is done other than the visible icon.

• <name>

The name of the extension. This is a tag.

• <desc>

The extension description. This is a tag.

Uses the "default" attribute. The default description for the extension will be the description displayed in the **Extensions** tab.

• owner

The creator or owner of the extension; for example, Oracle.

• location

The location and file name of the extension installer file. This can be `msi` or `svext.exe`; `exe` is not supported.

• <uninstallMsg>

Optional. For uninstalls, displays a custom message to the user.

Uses the "default" attribute. The default description for the `uninstallMsg` will be the custom message displayed during uninstall.

• <options>

Optional. For `msi` installations only. All options for the Microsoft Windows Installer Tool, `Msiexec.exe`, are supported.

## Manual Update XML Example

```
<update>
<extension id="Oracle.SmartView.ExtensionSamples.PowerPack.AdjustData"
  format="1"
  version="1.1.3.0"
  svVersion="11.1.2.2.310"
  visible="1" allowUninstall="1"
  manualUpdate="0"
  manualInstall="0"
  type="0"
  required="1">
  <name>Adjust Data</name>
  <desc default="Simple data adjustment panel for use with Smart View">
  <owner>Oracle</owner>
  <location>file://server_name/shared/ExtensionInstallers/AdjustDataInstaller.svext
  </location>
  <uninstallMsg default="This will remove the extension and all its components"
  </uninstallMsg>
</extension>
</update>
```

## Configuring Auto-Update Extensions

You can add the `visible` and `allowUninstall` attributes to the `UpdateList.xml` manifest file to change the behavior of the extensions that are part of the Auto-Update process.

If you do not add the attributes to `UpdateList.xml`, extensions will continue to be updated using the existing Auto-Update process.

To add the `visible` and `allowUninstall` attributes to the Auto-Update extensions, complete the procedure in [Configuring Manual Extension Updates](#).

See [Auto-Update XML Defined](#) and [Auto-Update XML Example](#) for reference.

You can also remove a single extension from the list of extensions available for Auto-Update in the `UpdateList.xml` file by commenting out the extension using the `<!--` and `-->` characters. For example:

```
<!--
<extension>
location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi" version="11.1.2.4.078"
id="nnnnnnnnn-nnnn-nnnn-nnnn-nnnnnnnnnnnn"> Oracle Disclosure Management
</extension>
-->
```

If you comment out the entire list of extensions, then all extensions are excluded from the manual update process.

## Auto-Update XML Defined

- `<update>`  
The root node. This is a tag.
- `<extension>`

Text that contains the extension name. This is a tag. The extension name appears in the **Extensions** tab of the **Options** dialog box. Examples of extension names are Oracle Predictive Planning Extension, Disclosure Management, or Adjust Data.

Attributes of <extension> are:

- id

The extension identifier. The identifier must match the `SVExtensionDescriptor.GUID` defined in the extension. It does not need to be a GUID, it only needs to be unique. This name will appear in the Windows Registry. For this reason, Oracle recommends using readable identifiers; for example, `Oracle.Disclosure.Management`.

- version

The version number of the extension.

- location

The location and file name of the extension installer file. This can be `msi` or `svext`; `exe` is not supported.

- operation

Optional. For Auto-Updates, set this value to “delete” to have the uninstall automatically begin when the user opens Office.

 **Note:**

The first time a user opens Office, if Oracle Smart View for Office determines that the extension needs to be uninstalled, the subsequent opening of Office initiates the uninstall process.

- options

Optional. For `msi` installations only. All options for the Microsoft Windows Installer Tool, `Msiexec.exe`, are supported.

- visible

Set this value to “1” to display the extension in the **Extensions** tab of the **Options** dialog box. When this is set to “1”, the extension will NOT be part of the Auto-Update process.

- allowUninstall

Set this value to “1” to display the **Remove** button in the **Extensions** tab of the **Options** dialog box.

## Auto-Update XML Example

```
<update>
<extension id="A.Unique.Id.That.Matches.Extension.Descriptor.Id"
  version="11.1.2.3.500.021"
  location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi"
  visible="1"
  allowUninstall="1">Disclosure Management
</extension>
```



```
<extension id="Another.Unique.Id"
  version="11.1.2.3.300"
  location="/epmstatic/SomeSetup.msi"
  operation="delete">Crystal Ball EPM
</extension>

<extension id="And.Another.Unique.Id"
  version="11.1.2.3.300"
  location="/epmstatic/SomeSetup.msi"
  options="/promptrestart">Oracle Predictive Planning
</extension>
</update>
```

## Downloading Extensions From Microsoft Internet Explorer

When downloading an extension for Oracle Smart View for Office 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, select **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` files 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 then try downloading and running the `.SVEXT` file directly from the browser.

## Administering Extensions When Using Mozilla Firefox

When using Mozilla Firefox, keep in mind the following:

- 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. As a result, when prompted to save or run the file, select the **Save** option, and then double-click the downloaded file to install the extension.
- When using Firefox as your web browser to launch Oracle Smart View for Office, 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.

# 4

## Accessing Shared Connections from an XML File

### Related Topics

- [About Accessing Shared Connections from an XML File](#)
- [Setting Up the Shared Connections XML File](#)
- [Connection File Syntax and Example](#)

### About Accessing Shared Connections from an XML File

 **Note:**

The procedures in this chapter apply to shared connections only.

You can use shared connection information from an XML file to connect to supported Oracle Smart View for Office providers, both cloud and on-premises. The XML file can exist either locally on each individual Smart View client machine or on a web server. Smart View end users point to this XML file in the **Shared Connections URL** field of the **Options** dialog box, and then access the available providers as they would any other shared connection to which they have access.

To connect to an Oracle Business Intelligence Enterprise Edition provider from the Shared Connections Panel in Smart View, you *must* follow the procedures in this topic. However, you may also connect to Oracle BI EE data sources from the Private Connections Panel using the procedure described in "Creating Private Connections" in the *Oracle Smart View for Office User's Guide*.

 **Note:**

Only ASCII characters are supported in the XML file. Do not use non-ASCII characters in any of the entries you make in this file.

 **Caution:**

The procedures in this chapter should be completed by the Smart View administrator.

## Setting Up the Shared Connections XML File

Setting up the shared connections XML file involves preparing the XML file distributing it to your users.

To set up shared connections in an XML file:

1. Create an empty XML file using any text editor and save it on your Oracle Smart View for Office client machine.

Give the file a meaningful name, such as `SmartViewProviders.xml`, and ensure that it has the `.xml` extension.

 **Note:**

Only ASCII characters are supported in the XML file. Do not use non-ASCII characters in any of the entries you make in this file.

2. Add the following line to the beginning of the file:

```
<?xml version="1.0" encoding="UTF-8"?>
```

3. Next, add the opening `res_GetProvisionedDataSources` tag:

```
<res_GetProvisionedDataSources>
```

4. Add entries for the applicable providers.

You can add entries for Oracle Hyperion Provider Services (Oracle Essbase), Oracle Hyperion Planning (both on-premises and in Oracle Planning and Budgeting Cloud), Oracle Hyperion Financial Management, Oracle Hyperion Reporting and Analysis, Oracle Hyperion Strategic Finance, Oracle Business Intelligence Enterprise Edition, and Oracle Enterprise Performance Reporting Cloud. The XML can contain entries for supported cloud providers, on-premises providers, or a mix of both.

When you create your entries, copy the syntax exactly and make ONLY these substitutions:

- In the `Product` tag, `name` attribute:  
*name*—An internal identifier for the provider. This will not display to users.
- In the `Product` tag, `displayVersion` attribute:  
*version*—The version number of the specified provider. This will not display to users.
- In the `Server` tag, `context` attribute:  
*webServerHost*—The web server host machine name.  
*webServerPort*—The web server port number. Use the default port number that is already noted in the syntax for each provider. Or, if you have configured your system using non-default port numbers, provide them.

The syntax for each provider type is below.

Provider Services (Essbase)

```
<Product id="APS" name="name" displayVersion="version">
<Server name="Oracle Hyperion Provider Services" context="http://
webServerHost:webServerPort/aps/SmartView"></Server>
</Product>
```

### Planning

```
<Product id="HP" name="name" displayVersion="version">
<Server name="Oracle Hyperion Planning, Fusion Edition" context="http://
webServerHost:webServerPort/HyperionPlanning/SmartView"></Server>
</Product>
```

### Financial Management

```
<Product id="HFM" name="name" displayVersion="version">
<Server name="Oracle Hyperion Financial Management, Fusion Edition"
context="http://webServerHost:webServerPort/hfmadf/./hfmoofficeprovider/
HFMOofficeProvider.aspx"></Server>
</Product>
```

### Reporting and Analysis

```
<Product id="RAFramework" name="name" displayVersion="version">
<Server name="Reporting and Analysis Framework" context="http://
webServerHost:webServerPort/raframework/browse/listXML"></Server>
</Product>
```

### Strategic Finance

```
<Product providerType="ExtensionProvider" id="HSF" name="name"
displayVersion="version">
<Server name="Oracle Hyperion Strategic Planning, Fusion Edition"
context="webServerHost:webServerPort/StrategicPlanning/SmartView"></Server>
</Product>
```

### Oracle BI EE

```
<Product providerType="ExtensionProvider" id="27EE9B0D-D5F5-42c9-
AFC5-44FEA770C693" name="name" displayVersion="version">
<Server name="Oracle BI, Fusion Edition" context="OBI:http://
webServerHost:webServerPort/analytics/jbips"></Server>
</Product>
```

### Oracle Planning and Budgeting Cloud

```
<Product id="HP" name="name" displayVersion="version">
<Server name="Planning and Budgeting Cloud" context="http://serviceURL/
HyperionPlanning/SmartView"></Server>
</Product>
```

### Oracle Enterprise Planning and Budgeting Cloud

```
<Product id="HP" name="name" displayVersion="version">
<Server name="Enterprise Planning and Budgeting Cloud" context="http://
serviceURL/HyperionPlanning/SmartView"></Server>
</Product>
```

### Oracle Enterprise Performance Reporting Cloud

```
<Product id="EPRCS" name="name" displayVersion="version">
<Server name="Enterprise Performance Reporting Cloud" context="http://
serviceURL/epm/SmartView"> </Server>
</Product>
```

### Oracle Financial Consolidation and Close Cloud

```
<Product id="HP" name="name" displayVersion="version">  
<Server name="Financial Consolidation and Close Cloud" context="http://  
serviceURL/HyperionPlanning/SmartView"></Server>  
</Product>
```

### Oracle Tax Reporting Cloud

```
<Product id="HP" name="name" displayVersion="version">  
<Server name="Tax Reporting Cloud" context="http://serviceURL/HyperionPlanning/  
SmartView"></Server>  
</Product>
```

- 5. Optional:** If you are planning to access help locally or from an internal URL, add an entry for locating the help:

- Help installed on a local drive:

```
<helpurlcontext>file:///parent_language_folder_path/</helpurlcontext>
```

For example:

```
<helpurlcontext>file:///C:/Oracle/SmartView/smartview_help/</helpurlcontext>
```

- Help installed on a web server:

```
<helpurlcontext>http://webServerHost:webServerPort/pathToHelpFiles/  
smartview_help/</helpurlcontext>
```

For example:

```
<helpurlcontext>http://abcxyzco.com:12345/user_documentation/  
smartview_help/</helpurlcontext>
```

#### Notes:

- Perform this step **ONLY** if you are planning to access shared connections from an XML file AND are required to access help either from a local drive or a web server within your organization. See [Installing and Configuring Help Locally or on a Web Server](#) for instructions on setting up help.
- If you use the `<helpurlcontext>` tag, the help location you specify overrides the default or modified location specified in the `<helpurlcontext>` tag in the `properties.xml` file, as described in [Optional Local Help Configuration via the Shared Connections XML File](#).

- 6. Optional:** Add an entry for the User Productivity Kit (UPK):

```
<UPK>http://link to User Productivity Kit</UPK>
```

For example:

```
<UPK>http://download.abcxyzco.com/ocomdocs/PlayerPackage/data/toc.html</UPK>
```

- 7.** Add the closing `res_GetProvisionedDataSources` tag to complete the file, then save it.

```
</res_GetProvisionedDataSources>
```

See [Connection File Syntax and Example](#) for the full syntax and an example of how this file should be set up.

- 8.** Test the file:

- a.** Perform an action:

- If you plan to have users copy the XML file to their local drive, ensure that the file is copied to a local drive on your Smart View client machine.  
For example, the file may be copied to the `SmartView\bin` directory.
- Alternatively, if you plan to copy the file to a web server, ensure that the file is accessible to your users from a fully-qualified URL that includes the XML file name and the `.xml` extension.

- b. Start Smart View and in the **Options** dialog box, edit the **Shared Connections URL** to add the full path to the file or a URL, ensuring that the `.xml` file name extension is included.

 **Note:**

This feature will not work if the `.xml` file name extension is not included at the end of the local drive path or URL.

- Local drive example:

```
C:/Oracle/SmartView/bin/SmartViewProviders.xml
```

Ensure that you use forward slashes (/) as separators in the file path.

The directory path and file should now be available in the list of shared connections.

- Web server URL syntax:

```
http://webServerHost:webServerPort/pathToFile/filename.xml
```

Web server URL example:

```
http://abcxyzcowebserver:1234/SmartViewDataSources/SmartViewProviders.xml
```

The URL should now be available in the list of shared connections.

- c. Connect to the file using the **Shared Connections** option in the Smart View Panel, as described in "Connecting to Data Sources" in the *Oracle Smart View for Office User's Guide*.

If you do not see provider entries listed in the **Shared Connections** drop-down list, then the XML file may contain incorrect syntax or invalid characters.

 **Tip:**

Verify the XML by opening the file in a browser; for example, in Internet Explorer. The browser will specify the invalid syntax. Correct any errors in the XML file editor, save, and refresh the browser display.

9. When the XML file is correct and complete, perform one of the following procedures:
- If you plan to have users copy the XML file to their local drive, distribute the file to your Smart View users with these instructions:

- a. Do not modify this file in any way.
- b. Copy the file to a local drive on your Smart View client machine.  
For example, the file may be copied to the `SmartView\bin` folder.
- c. Start Smart View and in the **Options** dialog box, edit the **Shared Connections URL** with the full path to the file on the local drive, including the file name and `.xml` extension; for example:

```
C:/Oracle/SmartView/bin/SmartViewProviders.xml
```

Ensure that you use forward slashes (/) as separators in the file path.

The directory path and file is now available in the list of shared connections.

- d. Test by connecting to the file using the Shared Connections option in the Smart View Panel, as described in "Connecting to Data Sources" in the *Oracle Smart View for Office User's Guide*.

If you have problems connecting, contact your Smart View administrator.

- If you plan to copy the XML file to a web server, notify your Smart View users with these instructions:

- a. Start Smart View and in the **Options** dialog box, edit the **Shared Connections URL** with the URL provided, including the file name and `.xml` extension; for example:

```
http://abcxyzcowebserver:1234/SmartViewDataSources/SmartViewProviders.xml
```

- b. Test by connecting to this URL using the Shared Connections option in the Smart View Panel, as described in "Connecting to Data Sources" in the *Oracle Smart View for Office User's Guide*.

If you have problems connecting, contact your Smart View administrator.

- c. **Internet Explorer users:** To use the URL given in step a, Oracle recommends setting the following options in Internet Explorer:
  - i. Select **Tools**, then **Internet Options**.
  - ii. In the **General** tab, **Browsing history** group, select **Settings**.
  - iii. In the **Check for newer versions of stored pages** section, select **Every time I visit the webpage**, and then click **OK**.
  - iv. In the **Internet Options** dialog box, select the **Advanced** tab.
  - v. In the **Security** section, select the **Empty Temporary Internet Files folder when browser is closed** option.
  - vi. Click **OK** to close **Internet Options** and restart the browser.

## Connection File Syntax and Example

### Related Topics

- [Connection File Syntax](#)
- [Connection File Example](#)



## Connection File Syntax

Below is the file syntax in its entirety:

```
<?xml version="1.0" encoding="UTF-8"?>
<res_GetProvisionedDataSources>
<Product id="APS" name="name" displayVersion="version">
<Server name="Oracle Hyperion Provider Services" context="http://
webServerHost:webServerPort/aps/SmartView"></Server>
</Product>
<Product id="HP" name="name" displayVersion="version">
<Server name="Oracle Hyperion Planning, Fusion Edition" context="http://
webServerHost:webServerPort/HyperionPlanning/SmartView"></Server>
</Product>
<Product id="HFM" name="name" displayVersion="version">
<Server name="Oracle Hyperion Financial Management, Fusion Edition" context="http://
webServerHost:webServerPort/hfmadf/./hfmoofficeprovider/HFMOfficeProvider.aspx"></
Server>
</Product>
<Product id="RAFramework" name="name" displayVersion="version">
<Server name="Reporting and Analysis Framework" context="http://
webServerHost:webServerPort/raframework/browse/listXML"></Server>
</Product>
<Product providerType="ExtensionProvider" id="name" name="HSF-11.1.2"
displayVersion="version">
<Server name="Oracle Hyperion Strategic Planning, Fusion Edition" context="http://
webServerHost:webServerPort/StrategicPlanning/SmartView"></Server>
</Product>
<Product providerType="ExtensionProvider" id="27EE9B0D-D5F5-42c9-AFC5-44FEA770C693"
name="name" displayVersion="version">
<Server name="Oracle BI, Fusion Edition" context="OBI:http://
webServerHost:webServerPort/analytics/jbips"></Server>
</Product>
<Product id="HP" name="name" displayVersion="version">
<Server name="Planning and Budgeting Cloud" context="http://serviceURL/
HyperionPlanning/SmartView"></Server>
</Product>
<Product id="HP" name="name" displayVersion="version">
<Server name="Enterprise Planning and Budgeting Cloud" context="http://serviceURL/
HyperionPlanning/SmartView"></Server>
</Product>
<Product id="EPRCS" name="name" displayVersion="version">
<Server name="Enterprise Performance Reporting Cloud" context="http://serviceURL/epm/
SmartView"></Server>
</Product>
<Product id="HP" name="name" displayVersion="version">
<Server name="Financial Consolidation and Close Cloud" context="http://serviceURL/
HyperionPlanning/SmartView"></Server>
</Product>
<Product id="HP" name="name" displayVersion="version">
<Server name="Tax Reporting Cloud" context="http://serviceURL/HyperionPlanning/
SmartView"></Server>
</Product>
<helpurlcontext>a valid entry as per optional step 5</helpurlcontext>
<UPK>http://link to User Productivity Kit</UPK>
</res_GetProvisionedDataSources>
```

## Connection File Example

The following example includes an entry for each provider type and also includes an entry for accessing help from an organization's internal web server:

```
<?xml version="1.0" encoding="UTF-8"?>
<res_GetProvisionedDataSources>
  <Product id="APS" name="APS-11.1.2" displayVersion="11.1.2.2.500">
    <Server name="Oracle Hyperion Provider Services" context="http://abcsvr.xyzco.com:19000/aps/SmartView"></Server>
  </Product>
  <Product id="HP" name="HP-11.1.2" displayVersion="11.1.2.2.000">
    <Server name="Oracle Hyperion Planning, Fusion Edition" context="http://abcsvr.xyzco.com:19000/HyperionPlanning/SmartView"></Server>
  </Product>
  <Product id="HFM" name="HFM-11.1.2" displayVersion="11.1.2.2.300">
    <Server name="Oracle Hyperion Financial Management, Fusion Edition" context="http://abcsvr.xyzco.com:19000/hfmadf/./hfmofficeprovider/HFMOfficeProvider.aspx"></Server>
  </Product>
  <Product id="RAFramework" name="RAFramework-11.1.2" displayVersion="11.1.2.2.000">
    <Server name="Reporting and Analysis Framework" context="http://abcsvr.xyzco.com:19000/raframework/browse/listXML"></Server>
  </Product>
  <Product providerType="ExtensionProvider" id="HSF" name="HSF-11.1.2" displayVersion="11.1.2.2.00.2266">
    <Server name="Oracle Hyperion Strategic Planning, Fusion Edition" context="http://abcsvr.xyzco.com.com:8900/StrategicPlanning/SmartView"></Server>
  </Product>
  <Product providerType="ExtensionProvider" id="27EE9B0D-D5F5-42c9-AFC5-44FEA770C693" name="OBI EE-11.1.1.7" displayVersion="11.1.1.7">
    <Server name="Oracle BI, Fusion Edition" context="OBI:http://abcsvr.xyzco.com:9704/analytics/jbips"></Server>
  </Product>
  <Product id="HP" name="PBCS" displayVersion="17.02">
    <Server name="Planning and Budgeting Cloud" context="http://mypbcs.mycloud.oraclecorp.com/HyperionPlanning/SmartView"></Server>
  </Product>
  <Product id="HP" name="EPBCS" displayVersion="17.02">
    <Server name="Enterprise Planning and Budgeting Cloud" context="http://myepbc.mycloud.oraclecorp.com/HyperionPlanning/SmartView"></Server>
  </Product>
  <Product id="EPRCS" name="EPRCS" displayVersion="16.12">
    <Server name="Enterprise Performance Reporting Cloud" context="http://myeprc.mycloud.oraclecorp.com/epm/SmartView"></Server>
  </Product>
  <Product id="HP" name="FCCS" displayVersion="16.12">
    <Server name="Financial Consolidation and Close Cloud" context="http://serviceURL/HyperionPlanning/SmartView"></Server>
  </Product>
  <Product id="HP" name="TRCS" displayVersion="17.02">
    <Server name="Tax Reporting Cloud" context="http://serviceURL/HyperionPlanning/SmartView"></Server>
  </Product>
  <helpurlcontext>http://abcxyzcowebserver:12345/user_documentation/smartview_help/</helpurlcontext>
  <UPK>http://download.abcxyzco.com/ocomdocs/PlayerPackage/data/toc.html</UPK>
</res_GetProvisionedDataSources>
```

# 5

## Installing and Configuring Help Locally or on a Web Server

### Related Topics

- [About Installing Help Locally or on a Web Server](#)
- [Setting Up Help Locally or on a Web Server](#)
- [Optional Local Help Configuration via the Shared Connections XML File](#)

### About Installing Help Locally or on a Web Server

After installing Oracle Smart View for Office, the online help is accessed from a URL hosted on the Oracle.com web site. This is the default behavior for Smart View, and no changes are required by users to launch help.

However, you may require that the help be installed locally or on a web server in your organization. Some examples for the need to access help from a location other than Oracle.com are:

- Help files must be installed on a local drive on an individual's computer for Section 508 accessibility purposes.
- Internet access limitations; for example, your users only have access to URLs on your organization's intranet.

To accommodate the above types of cases, a help zip file can be downloaded from My Oracle Support. You unzip the help to a local drive or web server, and then modify the Smart View `properties.xml` file to point the help location.

#### Note:

Depending on your requirements, you may also want to specify the `<helpurlcontext>` tag in a shared connections XML file, as described in [Setting Up the Shared Connections XML File of Accessing Shared Connections from an XML File](#). Refer to [Optional Local Help Configuration via the Shared Connections XML File](#) for more information.

### Setting Up Help Locally or on a Web Server

To install and configure Oracle Smart View for Office help locally or on a web server:

1. Obtain the help zip file for this release from My Oracle Support.
2. Extract the contents to either a local folder on the computer where Smart View is installed or to a folder accessible by your users on an HTTP web server in your organization.

For example:

- Extract the contents locally to:

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

The extraction adds an additional folder named `smartview_help`. The result is:

```
C:\Oracle\SmartView\smartview_help
```

- Extract the contents to a web server:

```
http://webServerHost:webServerPort/pathToHelpFiles
```

The extractions adds `smartview_help` after `pathToHelpFiles`. The result is:

```
http://webServerHost:webServerPort/pathToHelpFiles/smartview_help
```

Under the `smartview_help` folder, there are 28 language folders; for example:

```
C:\Oracle\SmartView
    \smartview_help
        \ar
        \cs
        \da
        \de
        \el
        \en
        \es
        \fi
        \fr
        \fr_CA
        \he
        \hu
        \it
        \ja
        \ko
        \nl
        \no
        \pl
        \pt
        \pt_BR
        \ro
        \ru
        \sk
        \sv
        \th
        \tr
        \zh_CN
        \zh_TW
```

The following language folders contain translated versions of the Smart View help:

```
\de
\es
\fr
\it
\ja
\ko
\nl
\pt_BR
\zh_CN
```

\zh\_TW

The remaining language folders contain the English version of the help. When you run Smart View in one of those languages (for example, Swedish) and you click a button for Help, the English help is displayed.

Additionally, the English folder contains a copy of the help in PDF format, `smartview_user.pdf`.

3. Modify the `helpurlcontext` property in the Smart View `properties.xml` file:
  - a. In your Smart View installation, navigate to the `SmartView\cfg` folder.
  - b. Make a backup copy of the original `properties.xml` file.
  - c. Open `properties.xml` for editing.
  - d. Modify the `helpurlcontext` property, providing the path to the folder that is parent to the language folders using the following syntax:
    - If installing locally, provide the path to the folder that is parent to the language folders using the following syntax:

```
<helpurlcontext>file:///parent_language_folder_path/</helpurlcontext>
```

 **Tip:**

Use forward slashes in the syntax and ensure that you enter a final forward slash (/) after the parent language folder path that you provide.

Using the example from step 2, after extracting the zip contents to `C:\Oracle\SmartView`, the `smartview_help` folder is the parent folder of the language folders. Thus, you would modify the `parent_language_folder_path` placeholder as follows:

```
<helpurlcontext>file:///C:/Oracle/SmartView/smartview_help/</helpurlcontext>
```

- If installing on a web server, provide the path to the folder that is parent to the language folders using the following syntax:

```
<helpurlcontext>http://webServerHost:webServerPort/pathToHelpFiles/smartview_help/</helpurlcontext>
```

 **Tip:**

Use forward slashes in the syntax and ensure that you enter a final forward slash (/) after the parent language folder path that you provide.

Using the example from step 2 and substituting `user_documentation` for `pathToHelpFiles`, after extracting the zip contents to `http://abcxyzco.com:12345/user_documentation`, the `smartview_help` folder is the parent folder of the language folders. For example:

```
<helpurlcontext>http://abcxyzco.com:12345/user_documentation/  
smartview_help/</helpurlcontext>
```

4. Restart your Microsoft Office applications and access the help from the Smart View ribbon.
5. Repeat this procedure for each computer that requires Smart View local help.

## Optional Local Help Configuration via the Shared Connections XML File

In a new installation, Oracle Smart View for Office help is available as soon as you start Excel. You do not need to be connected to a Smart View provider in order to view the help. After making the changes to the `properties.xml` file described in this chapter, help is accessed from the help location you indicate.

If you are also planning to access shared connections from an XML file (as described in [Accessing Shared Connections from an XML File](#)), AND you require an alternative location for the help, note the following:

- You can add the `<helpurlcontext>` tag to the shared connections XML file. The help location you specify in the shared connections XML file overrides the help location specified in `properties.xml` once you click the **Shared Connections** button in the Smart View Panel. This is true whether or not you modify the `<helpurlcontext>` tag in `properties.xml`.
- If you do not add or specify the `<helpurlcontext>` tag to the shared connections XML file, then the local help defined in the `properties.xml` file will ALWAYS be used and is available as soon as you start Excel.

# 6

## Tips and Troubleshooting

### Related Topics

- [Diagnostics Tools and Health Check](#)
- [Installation and Languages](#)
- [Windows, Office, and Smart View Locale Settings](#)
- [Office .NET Installation Option Requirement](#)
- [Microsoft Office 365 ProPlus Support](#)
- [Installing in Program Files Folder on Windows 10](#)
- [Installing a Pre 11.1.2.5.510 Version of Smart View](#)
- [VBA Function Error for Oracle Analytics Cloud or Oracle BI EE](#)
- [Disclosure Management Autodeployment Issue](#)
- [Failure Connecting to Oracle Analytics Cloud](#)
- [Smart View Ribbon Fails to Display After Non-Admin Installation on Windows 10](#)
- [Error When First Launching Excel After Installing Smart View](#)
- [Issues When Starting Excel in Automation Mode](#)
- [Enabling and Disabling Smart View and Other Office Add-ins](#)
- [Extension Installation from EPM Cloud and Message Window Focus](#)
- [Extension Updates and Office Applications Remaining Open](#)
- [Slowness with Extension Options Dialog Box](#)
- [Office Slow to Start when Internet Connectivity is Not Available](#)
- [Excel Process Stops Responding \(Hangs\) on Shut Down](#)
- [Extension Updates and Outlook](#)
- [Enabling the Smart View Extension for Firefox](#)
- [Uninstallation Process Stops Responding](#)
- [Excel Looks for HsTbar.xml File After Uninstall](#)
- [Internet Explorer Compatibility View Settings for Financial Reporting](#)
- [Web Launch with Internet Explorer in Protected Mode](#)
- [Working with Custom HTML-based Login Forms](#)
- [Browser Settings When Working with XML Files on HTTP Server](#)
- [Flickering Issues on Office 2013 and Office 2016](#)
- [Transition Navigation Keys Not Supported](#)
- [Smart View HTTP Session Timeout](#)
- [Duplicate Queries in Word Slow to Refresh](#)

- [Issues with Dynamic Data Exchange Option in Excel](#)
- [Performance and Memory Usage Considerations for Smart View with Excel](#)
- [Unbalanced Loads in Provider Services Clustered Environments](#)
- [Two-Way SSL and Problematic Certificates](#)

## Diagnostics Tools and Health Check

### [Diagnostic Tools](#)

### [Health Check](#)

#### **Diagnostic Tools**

When an issue arises while using Oracle Smart View for Office that you cannot resolve on your own, use the Smart View Diagnostic tools 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.

The Smart View Diagnostic tools are located in the **Diagnostics** group in the Smart View ribbon. You enable the display of the tools by

You can customize certain features of Smart View Diagnostic tools; for example:

- Hide data values in an Office document.
- Hide member names in an Office document.
- Direct the diagnostics output files to a folder other than the default.
- Allow automatic screenshots for each warning or error message that is displayed.

See Smart View Diagnostics in the *Oracle Smart View for Office User's Guide* for more information on the Diagnostics tools.

#### **Health Check**

You can perform a "health check" on your system to optimize performance and to get information about your machine, Microsoft Office version, Smart View version, and the extensions you have installed.

You can view the following information about your system:

- Version Information—Operating System, Excel Version, Smart View Version
- Hardware Information—RAM Memory, Processor, Smart View Installed Drive Space
- Excel Add-ins—Depends on the Excel add-ins that are installed
- COM Add-ins—Depends on the COM add-ins that are installed

You can make the following changes to system settings and Smart View options:

- Registry Information
  - KeepAlive Timeout
  - Receive Timeout



- ServerInfo Timeout
- Smart View Options
  - Undo Buffer
  - Improve Metadata Storage
- Graphic Setting
  - Disable Windows Transitions on Addin Task Panes
  - Disable Animations

For more information, see "Performing a Health Check On Your System" in the *Oracle Smart View for Office User's Guide*.

## Installation and Languages

The Oracle Smart View for Office installer uses the language set in the **Format** field of the Windows **Region and Language** dialog box, **Formats** tab. This language also becomes the default language when running Smart View.

After installation, anytime you change the Smart View language setting (**Options** dialog box, **Advanced** tab), Smart View remembers the new setting on each subsequent launch of Excel.

To return Smart View to the default language, you can use either of the following methods in the **Options** dialog box, **Advanced** tab:

- Click the **Reset** button.
- Select the first option in the **Language** drop-down list. This is always **Default**, which is the language specified in the **Region and Language** dialog box, **Formats** tab

After uninstalling and then reinstalling, Smart View reverts to the language specified in the Windows **Region and Language** dialog box, **Formats** tab, and not the last language specified in the Smart View **Options** dialog box, **Advanced** tab.

## Windows, Office, and Smart View Locale Settings

On each Oracle Smart View for Office 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.

## Office .NET Installation Option Requirement

During Microsoft Office installation, you must enable the .NET installation option. When enabled, files are placed in your Office installation that support interoperability between Office and other programs and add-ins, such as Oracle Smart View for Office and Smart View extensions.

Smart View works with these Office interop files:

- `Microsoft.Office.Interop.Excel`
- `Microsoft.Office.Interop.Powerpoint`
- `Microsoft.Office.Interop.Word`
- `Microsoft.Office.Interop.Outlook`

If these files are not installed, Smart View does not behave as expected. For example, when connected to Oracle Enterprise Performance Reporting Cloud, you may see a blank report package panel, resulting in an exception error when clicking in your Office application. Additionally, in the Smart View log file, you will get errors for an Office interop file; for example:

```
System.IO.FileNotFoundException: Could not load file or assembly  
'Microsoft.Office.Interop.PowerPoint  
Could not load file or assembly 'Microsoft.Office.Interop.PowerPoint
```

If you see errors in the Smart View log file such as the one shown above, reinstall Office and ensure that the .NET option is enabled.

## Microsoft Office 365 ProPlus Support

A known issue with Microsoft Office 365 ProPlus patch 16.0.10228.20051, updated through the insider slow channel, prevents users from accessing Oracle Smart View for Office with Office 365, resulting in the “Member not found” message being displayed. This Microsoft patch was pushed to users who signed up for monthly channel updates between June 12 and June 14, 2018.

**Workaround:** Update Office with Microsoft Office 365 Version 1806 (Build 10228.20080), which contains the fix for this issue.

## Installing in Program Files Folder on Windows 10

On Windows 10, non-administrator users are not authorized to modify the `Program Files` folder. Therefore, if an administrator installs Oracle Smart View for Office 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.

## Installing a Pre 11.1.2.5.510 Version of Smart View

If you have installed Oracle Smart View for Office 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.

## VBA Function Error for Oracle Analytics Cloud or Oracle BI EE

28791548 -- After uninstalling and reinstalling Oracle Smart View for Office, the following error was displaying when using a VBA function for Oracle Analytics Cloud or Oracle Business Intelligence Enterprise Edition:

```
Error '-2147024894(800700002)': Automation error The system cannot find the file specified.
```

In some cases, when Smart View is installed as administrator, the uninstall and reinstall does not handle registration of the Oracle BI EE extension file correctly.

To remedy this issue, after installation, and before starting Office, install the Oracle BI EE extension manually:

1. After uninstalling and reinstalling Smart View, ensure that all Office applications remain closed.
2. Navigate to `C:\Oracle\SmartView\extensions` and double-click on `JBIPSPProviderInstaller.svext`.
3. In the message that indicates successful installation, click **OK**.

The Oracle BI EE extension installation is complete and you may start Office.

## Disclosure Management Autodeployment Issue

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 Oracle Smart View for Office `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.

# Failure Connecting to Oracle Analytics Cloud

## Issue

In some cases, in an Oracle Analytics Cloud production environment, users may have issues connecting to Oracle Analytics Cloud from their Oracle Smart View for Office installation.

This is the type of scenario where this situation can occur:

- Users connect to Oracle Analytics Cloud via VPN
- Oracle Analytics Cloud is protected by Oracle Identity Cloud Service, which is requested through an Internet Proxy
- Oracle Identity Cloud Service is integrated with a federated single-signon system, such as Ping Identity
- Users on two different domains install Smart View via a package, delivered using Microsoft Application Virtualization (Microsoft App-V)

When trying to connect, an empty login screen pops up repeatedly, and then the login finally fails. This can happen when pasting a connection URL in the Private Connection Panel.

## Cause

The root cause for this issue is that the Smart View packaged version, prior to login, opened a browser process named `ielowutil.exe`. The non-packaged local install of Smart View, or packaged install with Microsoft Internet Explorer already running, both launched `iexplore.exe` instead.

The `ielowutil.exe` file is a special protected version of Internet Explorer named "Low MIC [Medium Integrity Cookie] Utility." It prevents the sharing of cookie data between processes of differing integrity.

This can explain why login to Oracle Analytics Cloud likely fails – since it requires cookie information that is set by both Oracle Identity Cloud Service and Ping Identity, and continues to assume the user is not logged in – redirecting back to Oracle Identity Cloud Service in a loop that escapes only after 12 times.

## Solution

Using Process Monitor (Windows Sysinternals), the registry key used to read the browser was different in each case and was identified as followed:

- **Working Key:**

```
HKEY_CLASSES_ROOT\Wow6432Node\CLSID\{0002DF01-0000-0000-C000-000000000046}\  
(Default)
```

Presents the value:

```
Internet Explorer(Ver 1.0)
```

- **Non-working Key:**

```
HKEY_CLASSES_ROOT\Wow6432Node\CLSID\{0002DF01-0000-0000-  
C000-000000000046}\LocalServer32\ (Default)
```

Presents the value:

```
"%ProgramFiles(x86)%\Internet Explorer\ielowutil.exe" -CLSID:
{0002DF01-0000-0000-C000-000000000046}
```

The registry key:

```
HKEY_CLASSES_ROOT\Wow6432Node\CLSID\{0002DF01-0000-0000-
C000-000000000046}\LocalServer32\ (Default)
```

is a pointer to:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Classes\Wow6432Node\CLSID\{0002DF01-0000-0000-
C000-000000000046}\LocalServer32\ (Default)
```

Changing this key to a new value of:

```
"%ProgramFiles(x86)%\Internet Explorer\iexplore.exe"
```

results in the Smart View package calling `iexplore.exe` instead, and the login succeeding.

All registry checks and changes must be done in the same App-V Package/Version ID environment as the Smart View package, ensuring that the local system is left intact; that is:

```
regedit /appvve:307790F2-DE31-4EBE-B3BC-4C9337032E73_0BE1C6E6-85CC-48C3-
A0FF-3BBB789681C3
```

Since users generally do not have admin access, you may roll out the fix to `HKEY_CURRENT_USER` by adding the key to the same path:

```
HKEY_CURRENT_USER\Software\Classes\Wow6432Node\CLSID\{0002DF01-0000-0000-
C000-000000000046}\LocalServer32\ (Default)
```

In the case of different Smart View packaged versions (some in an App-V connection group) across different domains, a PowerShell script can be written to identify the Smart View packages and make the correct registry changes.

Testing, this key change should result in Smart View users being able to successfully and consistently log in to Oracle Analytics Cloud.

## Smart View Ribbon Fails to Display After Non-Admin Installation on Windows 10

In some cases, installing Oracle Smart View for Office on Windows 10 as a non-admin can cause the Smart View ribbon to fail to display.

In a non-admin install, you double-click the `SmartView.exe` file to launch the installer. In an admin install, you right-click `SmartView.exe` and select **Run as administrator**.

If you installed Smart View as a non-admin and the Smart View ribbon does not display, complete the following procedures to troubleshoot this issue:

[Add the COM Add-in](#)

[Reinstall Smart View as Administrator](#)

**Add the COM Add-in**

To add the Smart View COM add-in:

1. Go to **File**, then **Options**, and then **Add-ins**.
2. From **Manage**, select **COM Add-ins**, and then **Go**.
3. In **COM Add-ins**, select the check box to enable the **Oracle Smart View for Office** add-in, and click **OK**.
4. Restart Excel.

If the Smart View ribbon does not display after restarting Excel, proceed to [Reinstall Smart View as Administrator](#)

#### Reinstall Smart View as Administrator

If the Smart View ribbon still fails to display after adding the COM add-in, perform these steps:

1. Uninstall Smart View.  
See [Uninstalling Smart View](#) for more information.
2. Reinstall Smart View by right-clicking `SmartView.exe` and selecting **Run as administrator**.  
See [Installing from My Oracle Support or Oracle Technology Network](#) for more information.
3. Launch Excel and verify that the Smart View ribbon is displayed.

## Error When First Launching Excel After Installing Smart View

After installing Oracle Smart View for Office and launching Excel for the first time, you may get an error message similar to the following: "Unable to set the installed property of the add-in class."

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

#### Trust Center Method

1. Perform the task appropriate for your Office version:
  - **2016, 2013, 2010:** Go to **File**, then **Options**, and then **Trust Center**.
  - **2007:** Click the Office button in the top left corner of Excel, then select **Excel Options**, and then **Trust Center**.
2. Click the **Trust Center Settings** button.
3. In the left pane, select **Trusted Locations**.
4. Click **Add new location** to launch the **Microsoft Office Trusted Location** dialog box.
5. In **Path**, enter the path to the Smart View bin folder; for example:  
`C:\Oracle\SmartView\bin`
6. Click **OK**.
7. Click **OK** to close the **Trust Center**, and then click **OK** to close **Excel Options**.

#### COM Add-ins Method:

1. Perform the task appropriate for your Office version:
  - **2016, 2013, 2010:** Go to **File**, then **Options**, and then **Add-ins**.
  - **2007:** Click the Office button in the top left corner of Excel, then select **Excel Options**, and then **Add-ins**.
2. From **Manage**, select **COM Add-ins**, and then **Go**.
3. In **COM Add-ins**, select the check box to enable the **Oracle Smart View for Office** add-in, and click **OK**.

## Issues When Starting Excel in Automation Mode

In some cases, third-party software that automates Excel processes, such as exporting to Excel, may cause issues with Excel and a conflict with Oracle Smart View for Office.

### Workaround:

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. To do this, create the Options key and DisableInAutomation key value as follows:

- Key Name:  
`[HKEY_CURRENT_USER\Software\Oracle\SmartView\Options]`
- Key Value:  
`"DisableInAutomation"=dword:00000001`

When set to 00000001, Smart View is disabled when Excel is started in automation mode. Smart View starts correctly when Excel is started manually, outside of an automated process.

When set to 0 or not created at all, then Smart View is enabled and starts when Excel is started in automation mode, which may cause issues. Smart View starts correctly when Excel is started manually, outside of an automated process.

### Creating the Registry Key and Key Value

To create and update the registry key, Options:

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

The value, `00000001`, enables the `DisableInAutomation` key.

 **Note:**

If a zero value is entered, then this option is disabled.

9. Exit Registry Editor.
10. Restart Excel.

## Enabling and Disabling Smart View and Other Office Add-ins

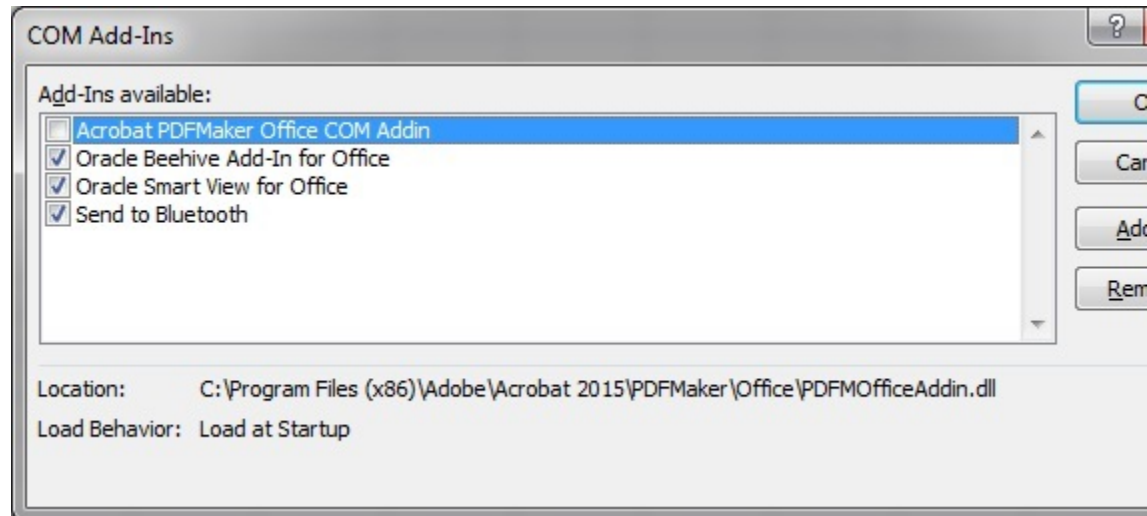
You can enable and disable Oracle Smart View for Office and other Microsoft Office add-ins from the **Add-Ins** tab in Excel Options. In some cases, Smart View performance can be improved when other Office add-ins are disabled.

To enable or disable Smart View or other Office add-ins for all applicable Office applications (including Outlook):

1. Open Excel, Word or PowerPoint.  
Do not use Outlook to enable and disable Office add-ins.
2. Perform the task appropriate for your Office version:
  - **2016, 2013, 2010:** Go to **File**, then **Options**, and then **Add-Ins**.
  - **2007:** Click the Office button in the top left corner of Excel, then select **Excel Options**, and then **Add-Ins**.Continue with step 3 to work with COM Add-ins. Continue with step 4 to work with Excel Add-ins.
3. To enable or disable COM add-ins, from **Manage**, select **COM Add-ins**, then click **Go** and then perform a task:
  - To enable add-ins, ensure that the check box next to the add-in is checked.  
If the check box next to the add-in is cleared, then click the check box to select it, and then click **OK**.  
If the add-in you want to enable is not in the list, click **Add**, navigate to the location of the add-in file in your system and select it, then click **OK**, and then click **OK** again in the **COM Add-Ins** dialog to close it.
  - To disable add-ins, ensure that the check box next to the add-in is cleared.  
If the check box next to the add-in is checked, then click the check box to clear it, and then click **OK**.

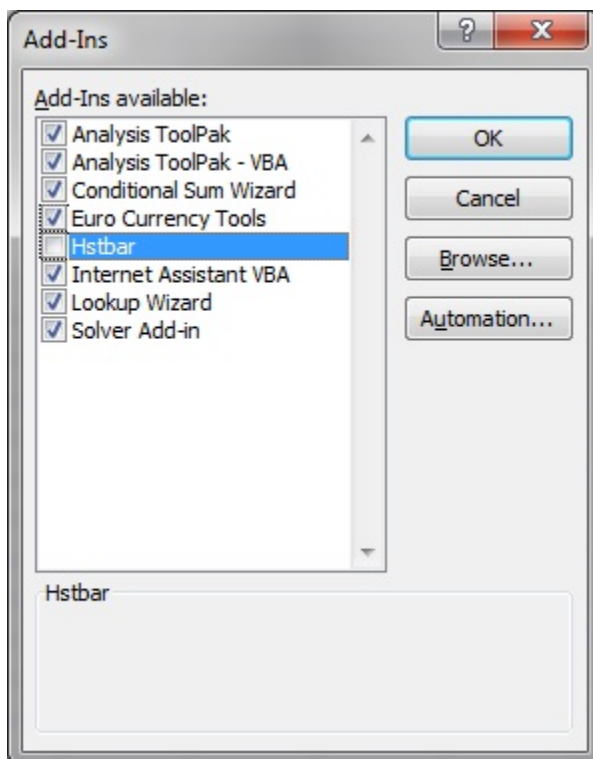
In the following example **COM Add-Ins** dialog box, the **Acrobat PDFMaker Office COM Addin**, is disabled; other available add-ins are enabled, including Smart View.





4. To enable or disable Excel add-ins, from **Manage**, select **Excel Add-ins**, then click **Go** and then perform a task:
  - To enable add-ins, ensure that the check box next to the add-in is checked.  
If the check box next to the add-in is cleared, then click the check box to select it, and then click **OK**.  
If the add-in you want to enable is not in the list, click **Browse**, navigate to the location of the add-in file in your system and select it, then click **OK**, and then click **OK** again in the **COM Add-Ins** dialog to close it.
  - To disable add-ins, ensure that the check box next to the add-in is cleared.  
If the check box next to the add-in is checked, then click the check box to clear it, and then click **OK**.

In the following example **Add-Ins** dialog box, the Smart View add-in, **Hstbar**, is disabled; other available add-ins are enabled. Note that these add-ins are not related to Smart View.



5. Restart any open Office applications.

## 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 EPRCSPProviderInstaller 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 `EPRCSPProviderInstaller.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 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. In these cases, an instance of Office is still running and Oracle Smart View for Office is unable to apply the extension updates correctly.

For these situations, 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.

## Slowness with Extension Options Dialog Box

When opening the **Extensions** tab of the **Options** dialog box or when checking for extension updates, if your system seems to be taking a long time to complete these tasks, ensure that the machine has access to the internet.

## Office Slow to Start when Internet Connectivity is Not Available

When starting Office, Oracle Smart View for Office performs various security checks at startup, including checks on all the installed extensions. Internet connectivity is required in order to perform these checks.

Without internet connectivity, the security checks on extensions cannot be carried out and Office applications will be very slow to launch.

You may disable extensions in order to improve Office startup time, but you will lose the functionality related to those extensions, even if you are still able to connect to data providers through your company's intranet.

Oracle recommends verifying that you can connect to the internet when starting Office with Smart View installed.

## Excel Process Stops Responding (Hangs) on Shut Down

Excel may be slow to shut down if the `Excel15.xlb` file is corrupted. This file stores changes to the ribbons in Excel.

A simple fix to this issue is to rename `Excel15.xlb`. A clean `Excel15.xlb` file is rebuilt the next time you start Excel.

The `Excel15.xlb` file is located in the `C:\Users\user\AppData\Roaming\Microsoft\Excel` folder.

To rename the `Excel15.xlb` file:

1. Close any open Excel applications and ensure that all `excel.exe` processes in the **Task Manager** are ended.
2. Locate the `Excel15.xlb` file in your `AppData` folder; the default location is:

```
C:\Users\user\AppData\Roaming\Microsoft\Excel
```

### Tip:

You can quickly navigate to this folder by entering `%appdata%\Microsoft\Excel` in the address bar of Windows Explorer.

3. Right-click the `Excel15.xlb` file name, then select **Rename**, then enter a new name for the file, and then press **Enter**.

For example, append `.old` to the name:

```
Excel15.xlb.old
```

4. Restart Excel.

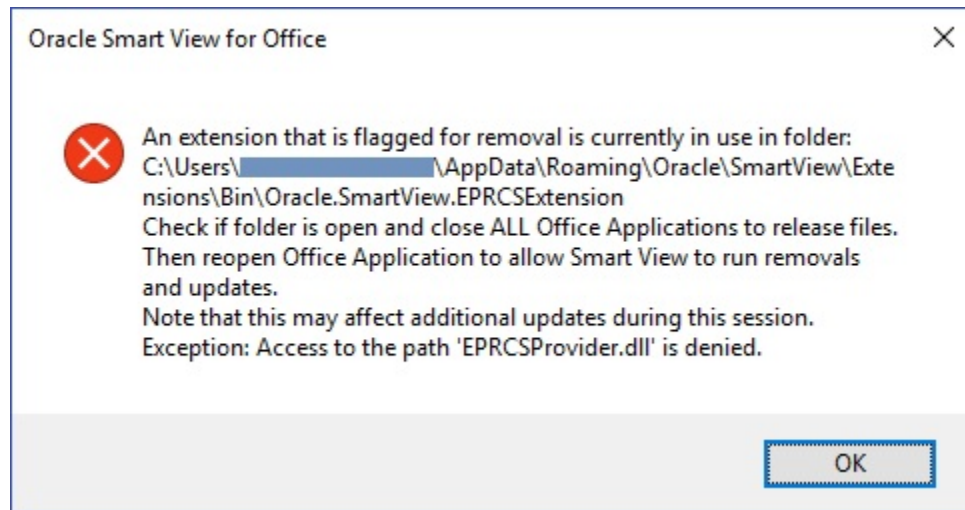
A new `Excel15.xlb` file is created in the `C:\Users\user\AppData\Roaming\Microsoft\Excel` folder.

## 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.

If the message in [Figure 1](#) is displayed after attempting an extension update, it means that one of the Office applications was *not* closed. Often, the application left open is Outlook.

**Figure 6-1 Message - Office Application Open During Extension Update**



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.  
Verify that the Smart View ribbon no longer appears.
5. Start a different Office application to continue the extension update process.

## Enabling the Smart View Extension for Firefox


During installation, Oracle Smart View for Office automatically installs an extension for Mozilla Firefox.

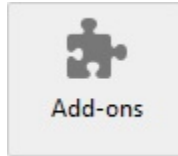
If you specify Firefox as your default browser, Smart View utilizes the extension for Firefox in these scenarios:

- Performing drill-through in Smart View
- Launching forms in Smart View from browser-based applications, such as Planning or Oracle Hyperion Financial Management.

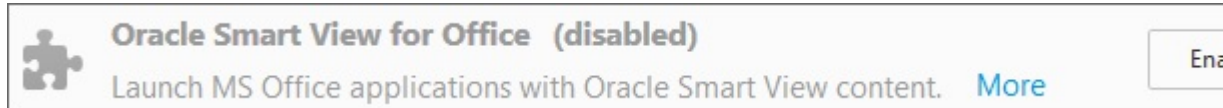
The extension for Firefox is automatically enabled after installing Smart View. However, if the extension should become disabled, follow the procedure in this topic to enable it again.

To enable the Smart View extension for Firefox:

1. In Firefox, in the upper right corner of the browser, click , and then select **Add-ons** from the drop-down menu:

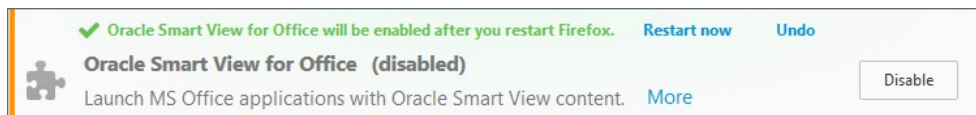


2. In the left pane, select **Extensions**, and then scan or search the list to locate the **Oracle Smart View Office** entry.



3. Click **Enable**, and restart Firefox.

You can restart Firefox immediately using the **Restart now** link, or restart Firefox at your convenience.



## Uninstallation Process Stops Responding

On supported Windows platforms, the Oracle Smart View for Office uninstallation process may stop responding.

If you have experienced this issue, try the following:

1. In the **Windows Task Manager**, kill all occurrences of these processes:
  - **Microsoft Register Server**
  - **Windows Installer**
2. In the **Control Panel**, check **Programs and Features** to verify if **Oracle Smart View for Office** is listed.

If **Oracle Smart View for Office** is not listed, then the uninstallation completed successfully.

If **Oracle Smart View for Office** is listed, select it, and then select **Uninstall** to try the uninstallation again.

## Excel Looks for HsTbar.xml File After Uninstall

Sometimes, after uninstalling Oracle Smart View for Office and subsequently launching Excel, Excel may still try to locate the Smart View `HsTbar.xla` file.

To correct this, you must edit the Windows Registry.

To edit the Windows Registry to keep Excel from looking for `HsTbar.xml` file after uninstalling Smart View:

1. Open the Windows Registry Editor (enter `regedit` in a command window).
2. Locate this key:

`HKEY_CURRENT_USER\Software\Microsoft\Office\<OfficeVersion>\Excel\Options`

3. Delete the `OPEN` or `OPEN<n>` entry where the value in the **Data** column contains `HsTbar.xla`.

For example:

`C:\Oracle\SmartView\bin\HsTbar.xla`

When there are multiple `OPEN` entries, perform these steps:

- a. Delete all `OPEN` entries where the **Data** column value contains `HsTbar.xla`.
- b. Rename all remaining `OPEN<n>` entries, maintaining their sequential values.

For example, here are six `OPEN` entries, where two of the entries, `OPEN` and `OPEN4`, contain `HsTbar.xla` in the **Data** column.

Name	Value in Data Column
<code>OPEN</code>	Contains <code>HsTbar.xla</code>
<code>OPEN1</code>	Does not contain <code>HsTbar.xla</code>
<code>OPEN2</code>	Does not contain <code>HsTbar.xla</code>
<code>OPEN3</code>	Does not contain <code>HsTbar.xla</code>
<code>OPEN4</code>	Contains <code>HsTbar.xla</code>
<code>OPEN5</code>	Does not contain <code>HsTbar.xla</code>

Delete the `OPEN` and `OPEN4` entries, and then rename the remaining entries as follows, maintaining their sequential order:

- Rename `OPEN1` to `OPEN`
- Rename `OPEN2` to `OPEN1`
- Rename `OPEN3` to `OPEN2`
- Rename `OPEN5` to `OPEN3`

The remaining entries are:

Name	Value in Data Column
<code>OPEN</code>	Does not contain <code>HsTbar.xla</code>
<code>OPEN1</code>	Does not contain <code>HsTbar.xla</code>
<code>OPEN2</code>	Does not contain <code>HsTbar.xla</code>
<code>OPEN3</code>	Does not contain <code>HsTbar.xla</code>

## Internet Explorer Compatibility View Settings for Financial Reporting

When running a Oracle Hyperion Financial Reporting report from Oracle Smart View for Office, 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.

**Workarounds:**

- Click to clear the message, and the report preview displays as expected.
- To avoid the compatibility message, modify the Windows Registry as follows.

**For 32-bit Office:**

In [HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Internet Explorer\MAIN\FeatureControl\FEATURE\_BROWSER\_EMULATION], add the following three DWORD (32-bit) values:

```
"EXCEL.EXE"=dword:00008000
"POWERPNT.EXE"=dword:00008000
"WINWORD.EXE"=dword:00008000
```

**For 64-bit Office:**

Add the three DWORD values for Excel, PowerPoint, and Word in [HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Internet Explorer\MAIN\FeatureControl\FEATURE\_BROWSER\_EMULATION].

The values must match your installed version of Internet Explorer. If you are unsure which entry to use, then use the 32-bit Office values noted above.

**Internet Explorer 8:**

```
"EXCEL.EXE"=dword:00008000
"POWERPNT.EXE"=dword:00008000
"WINWORD.EXE"=dword:00008000
```

**Internet Explorer 9:**

```
"EXCEL.EXE"=dword:00009000
"POWERPNT.EXE"=dword:00009000
"WINWORD.EXE"=dword:00009000
```

**Internet Explorer 10:**

```
"EXCEL.EXE"=dword:00010000
"POWERPNT.EXE"=dword:00010000
"WINWORD.EXE"=dword:00010000
```

**Internet Explorer 11:**

```
"EXCEL.EXE"=dword:00011000
"POWERPNT.EXE"=dword:00011000
"WINWORD.EXE"=dword:00011000
```

## Web Launch with Internet Explorer in Protected Mode

When Microsoft Internet Explorer is running in protected mode, web launch does not function. This means you cannot launch Oracle Smart View for Office content from Internet Explorer.

In Internet Explorer, you can add specific website URLs as trusted sites and clear the protected mode setting for those sites. Then you can launch Smart View content from Internet Explorer

To add trusted URLs and clear the protected mode setting for those URLs:



1. In Internet Explorer, go to **Internet Options**, then **Security**, and then **Trusted sites**.
2. Click **Sites**, then add the workspace URL or cloud service URL to the list of trusted sites.  
Repeat for all trusted workspace and cloud service URLs that you want to add.
3. Click **Close**.
4. Verify that in the **Security** tab, the **Enable Protected Mode** check box is cleared.
5. Click **OK** to exit the **Internet Options** dialog, and restart Internet Explorer.

## Working with Custom HTML-based Login Forms

If you are using a custom HTML-based login form instead of the default Oracle Access Manager login form, ensure that the source of the custom form includes the string `loginform`. This is required for Oracle Smart View for Office integration with Oracle Access Manager to work.

## Browser Settings When Working with XML Files on HTTP Server

Internet Explorer may cache XML files posted on an HTTP server and referenced by Oracle Smart View for Office. This can cause problems when using the following Smart View functionality:

- Accessing shared connections from an XML file  
This is the XML file posted on an HTTP server and noted in the **Shared Connections URL** field of the Smart View **Options** dialog box. If you plan to access online help from a local drive or internal web server, this file can also specify the location of the help.
- Updating extensions  
Smart View references the `UpdateList.xml` file that is posted on an HTTP server when Smart View end users install, update, and remove extensions in the **Extensions** tab of the **Options** dialog box.

Complete the steps in this topic to clear the browser cache so that the latest version of the XML file is used for the purposes noted above.

To clear the cache so that Smart View is accessing the latest XML file version posted on an HTTP server, set the following options in Internet Explorer:

1. Select **Tools**, then **Internet Options**.
2. In the **General** tab, **Browsing history** group, select **Settings**.
3. In the **Check for newer versions of stored pages** section, select **Every time I visit the webpage**, and then click **OK**.
4. In the **Internet Options** dialog box, select the **Advanced** tab.
5. In the **Security** section, select the **Empty Temporary Internet Files folder when browser is closed** option.
6. Click **OK** to close **Internet Options** and restart the browser.

## Flickering Issues on Office 2013 and Office 2016

When using Smart View with Microsoft Office 2013 or 2016, 32-bit or 64-bit, flickering occurs with the POV toolbar and the Smart View Panel. The flickering is likely caused by changes in Excel 2013 and Excel 2016.

To reduce flickering, Oracle advises that you add the following two DWORD values to the Windows Registry:

- [Disable Window Transitions \(DisableWindowTransitionsOnAddinTaskPanes\)](#)
- [Disable Office Animations \(DisableAnimations\)](#)

### Disable Window Transitions (DisableWindowTransitionsOnAddinTaskPanes)

To improve the user experience, you may enable the DWORD value `DisableWindowTransitionsOnAddinTaskPanes` for Office 2013 and 2016. To do this, add the `DisableWindowTransitionsOnAddinTaskPanes` key value to the `Toolbars` key in the Windows Registry as follows:

- Key Name:  
`[HKEY_CURRENT_USER\Software\Microsoft\Office\<OfficeVersion>\Common\Toolbars]`
- New DWORD and value:  
`"DisableWindowTransitionsOnAddinTaskPanes"=dword:1`

To add the new `DisableWindowTransitionsOnAddinTaskPanes` DWORD to the `Toolbars` registry key:

1. Click **Start**, click **Run**, type `regedit` in the **Open** box, and then click **OK**.
2. Depending on your Office version, locate and then select the following registry key:
  - Office 2013:  
`HKEY_CURRENT_USER\Software\Microsoft\Office\15.0\Common\Toolbars`
  - Office 2016:  
`HKEY_CURRENT_USER\Software\Microsoft\Office\16.0\Common\Toolbars`
3. From the **Edit** menu, select **New**, and then select **DWORD Value**.
4. Type `DisableWindowTransitionsOnAddinTaskPanes`, and then press **Enter**.
5. In the **Details** pane, right-click `DisableWindowTransitionsOnAddinTaskPanes`, and then select **Modify**.
6. In the **Value** data box, type `1`, and then click **OK**.
7. Exit Registry Editor.
8. Restart Excel.

## Disable Office Animations (DisableAnimations)

To further improve the user experience, you may disable Office Animations for Office 2013 and 2016 by adding a key and DWORD value to the Windows Registry. To do this, create the Graphics key and DisableAnimations key value as follows:

- Key Name:

```
[HKEY_CURRENT_USER\Software\Microsoft\Office\<OfficeVersion>\Common\Graphics]
```

- Key Value:

```
"DisableAnimations"=dword:00000001
```

To create and then update the registry key, `Graphics`, and add the new `DisableAnimations` DWORD value:

1. Click **Start**, click **Run**, type `regedit` in the **Open** box, and then click **OK**.
2. Locate and then select the following registry key:
  - Office 2013:  

```
HKEY_CURRENT_USER\Software\Microsoft\Office\15.0\Common\
```
  - Office 2016:  

```
HKEY_CURRENT_USER\Software\Microsoft\Office\16.0\Common\
```
3. From the **Edit** menu, select **New**, and then select **Key**.
4. Type `Graphics`, and then press **Enter**.
5. From the **Edit** menu, select **New**, and then select **DWORD Value**.
6. Type `DisableAnimations`, and then press **Enter**.
7. In the **Details** pane, right-click **DisableAnimations**, and then click **Modify**.
8. In the **Value** data box, type `00000001`, and then click **OK**.
9. Exit Registry Editor.
10. Restart Excel.

## Transition Navigation Keys Not Supported

Oracle Smart View for Office 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 example:

- In Excel, copy/paste, macros, automation API calls do not work correctly.
- In the Planning Admin extension, member formula formatting in the Smart View Dimension Editor does not display correctly; formulas have incorrect syntax when submitted to Oracle Hyperion Planning.

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

- The Excel option, **Transition navigation keys**, must be cleared.

- The **Smart View** option, **Improve Metadata Storage**, must be enabled (by default, this option is enabled).

## Smart View HTTP Session Timeout

HTTP session timeouts can occur, for example, when working with large queries that take a long time to run, or when you're experiencing slower internet connections.

To avoid HTTP session timeouts, you may add the following Windows Registry DWORDS to the Internet Settings key:

- Key Name:  
`HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Internet Settings`
- Key Values:
  - DWORD: ReceiveTimeout  
Value data: *value in milliseconds*
  - DWORD: KeepAliveTimeout  
Value data: *value in milliseconds*
  - DWORD: ServerInfoTimeout  
Value data: *value in milliseconds*

For example, 900000 milliseconds is the equivalent of 15 minutes. Adjust the timing according to your requirements.

As a guideline, 900000 milliseconds is the equivalent of 15 minutes.

To add the timeout key values to the Internet Settings registry key:

1. Ensure that all Office applications, including Outlook, are closed.
2. Launch the Windows Registry Editor.
3. Locate and then select the following registry subkey:

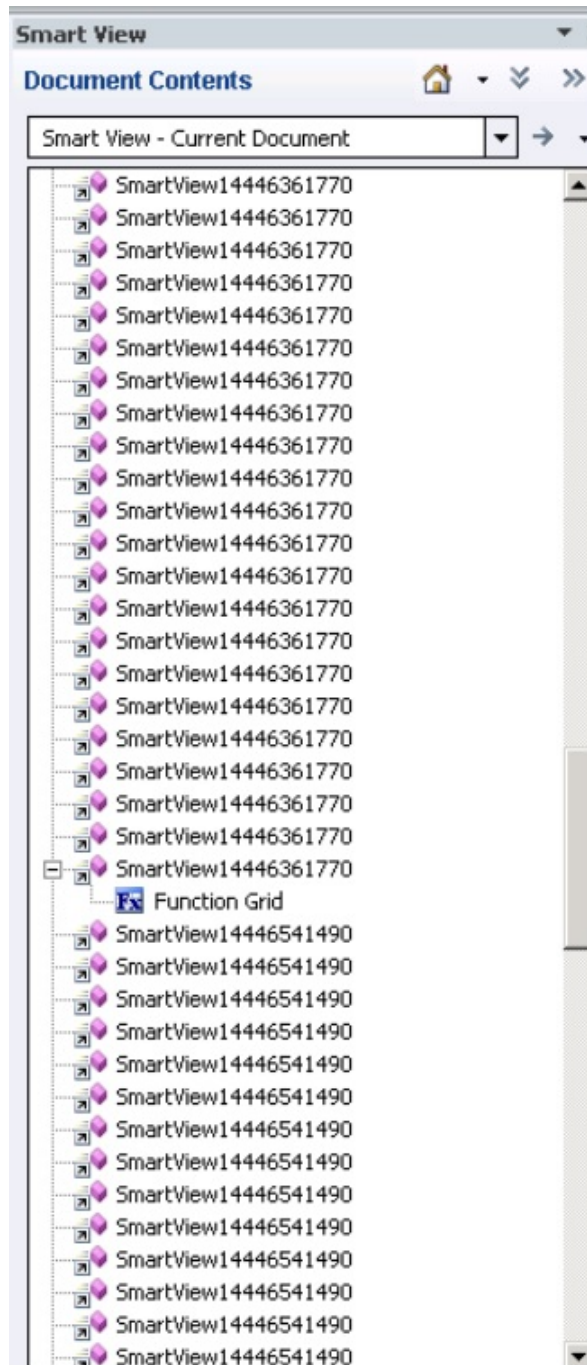
```
HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Internet Settings
```

4. Add the three DWORD key values, `ReceiveTimeout`, `KeepAliveTimeout`, and `ServerInfoTimeout`:
  - a. From the **Edit** menu, select **New**, and then select **DWORD Value**.
  - b. Type the DWORD name, and then press **Enter**.
  - c. In the **Details** pane, right-click DWORD you added in step 4.b, and then select **Modify**.
  - d. In the **Value data** text box, type the timeout value in milliseconds, select **Decimal**, and then click **OK**.
  - e. Repeat step 4.a through step 4.d for each of the three required DWORD key values.
5. Exit Registry Editor.
6. Restart Excel.

## Duplicate Queries in Word Slow to Refresh

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

If the document contains many duplicate queries (that is, queries with the same name), the duplicate queries are displayed in the Document Contents pane in Word. For example, Document Contents might look like this:



The duplicate queries are SmartView14446361770 and SmartView14446541490.

You can run the Visual Basic macro below to remove the duplicate queries:

```
Sub DeleteExtraQueries()  
,  
    ' DeleteExtraQueries Macro  
,  
  
    Dim queriesName As Variant  
    Dim uniqueQueriesName As New Collection  
    Dim varName, newList As String  
    Set vars = ActiveDocument.Variables
```

```

For i = 1 To vars.Count
    varName = vars.Item(i).Name
    If Not StrComp(vars.Item(i).Name, "SV_QUERY_LIST", vbTextCompare) Then
        List = vars.Item(i).Value
        queriesName = Split(List, "<|>")

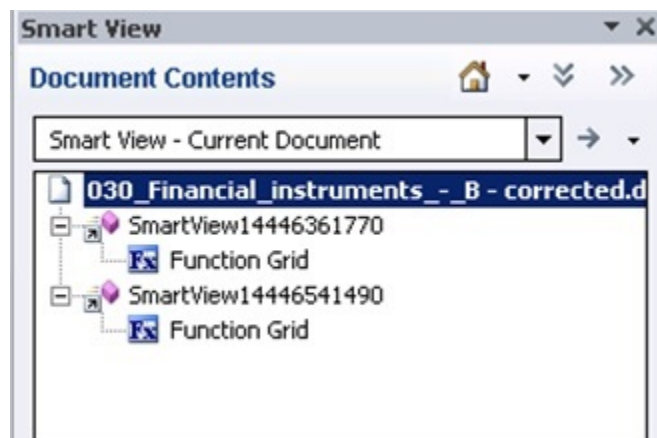
        On Error Resume Next
        For Each queryName In queriesName
            uniqueQueriesName.Add queryName, queryName
        Next
        newList = ""
        For Each queryName In uniqueQueriesName
            newList = newList & queryName & "<|>"
        Next
        newList = Left(newList, Len(newList) - 3)
        vars.Item(i).Value = newList
    End If

Next

End Sub

```

After running the macro, the two queries, SmartView14446361770 and SmartView14446541490, appear only once in Document Contents:



## Issues with Dynamic Data Exchange Option in Excel

Various issues may arise when the Excel option, **Ignore other applications that use Dynamic Data Exchange (DDE)**, is selected. For example, there are problems launching Excel, launching Excel files from outside of Excel, and using the **Export in Query Ready Mode** option from a browser to export balances from Oracle Hyperion Financial Reporting.

**Workaround:** Click the Microsoft Office Button (upper left corner of Excel), and then click **Excel Options**. In the **Advanced** category, scroll down to the **General** options, and then clear the **Ignore other applications that use Dynamic Data Exchange (DDE)** check box. Restart Excel.

## Performance and Memory Usage Considerations for Smart View with Excel

Oracle Smart View for Office is a Microsoft Office add-in. As an add-in, it is loaded in to the Microsoft Excel process. When a report is imported into Excel through Smart View, the Excel process consumes memory and this can negatively impact performance.

For example, instances of grids and forms, objects in the Undo buffer, XML parsing, etc., will cause the Excel process to consume memory. Because of this, the Excel or machine memory limit becomes the Smart View memory limit as well. This can severely impact performance.

There is no memory configuration parameter in Smart View to manage this.

Excel 32-bit and 64-bit have different memory limits:

- For Excel 32-bit, the maximum memory limit, or RAM, is 2GB.  
Oracle testing showed that when Excel 32-bit memory usage reaches beyond 700 MB, Excel can behave abnormally and can terminate unexpectedly.
- The 64-bit versions of Excel are not constrained to 2 GB of RAM, as are the 32-bit Office applications.

For large reports, Oracle recommends using 64-bit Excel. Or consider reducing the data being sent to Smart View by reducing the number of rows, columns, and POVs in the reports.

Oracle suggests that you consider taking some or all of the actions listed below in an effort to limit memory usage and improve performance.

The following actions can help to limit memory usage:

1. In the Smart View **Options** dialog box, **Advanced** tab, ensure that these options are enabled:
  - **Reduce Excel File Size**
  - **Improve Metadata Options**
2. In the **Options** dialog box, **Advanced** tab, set **Number of Undo Actions** to '0' (zero), if possible, or to a low number such as 1 or 2.
3. Change Excel calculation from Automatic to Manual. Go to the Excel **Formulas** ribbon, then select **Calculation Options**, and then select **Manual**.
4. In the **Options** dialog box, **Formatting** tab,
  - a. If you have selected the **Use Excel Formatting** option, then you should clear the **Move Formatting on Operations** option.
  - b. Clear the **Adjust Column Width** option.
  - c. Clear the **Retain Numeric Formatting** option.
5. In the **Options** dialog box, **Extensions** tab, disable any unneeded extensions.
6. In Excel, to improve performance and stability, disable or uninstall any unused add-ins. For example, disable or uninstall the Oracle Essbase Spreadsheet Add-



in. Other possible add-ins to disable or uninstall are, for example, Adobe PDF, WebEx, or Send to Bluetooth

7. Reduce the workbook size.
8. Limit the data imported to Excel:
  - a. Use prompts, filters, POVs, or other ways to reduce the data returned back to Smart View.
  - b. Enable the **Suppress Rows** and **Suppress Columns** options in the **Data Options** tab of the Smart View **Options** dialog box.

The following actions can help to improve performance, as well as limit memory usage:

1. In the **Options** dialog box, **Advanced** tab, set **Number of Undo Actions** to '0' (zero), if possible.
2. In the **Options** dialog box, **Member Options** tab, ensure that these options are cleared:
  - **Preserve Formulas and Comments in ad hoc options**
  - **Formula Fill**

Clear these options only if you do not need to preserve formulas or comments during ad hoc operations.

Also, refer to the following documentation from Microsoft, "Excel 2010 Performance: Performance and Limit Improvements":

[http://msdn.microsoft.com/en-us/library/ff700514\(v=office.14\).aspx](http://msdn.microsoft.com/en-us/library/ff700514(v=office.14).aspx)

## Unbalanced Loads in Provider Services Clustered Environments

In some Oracle Hyperion Provider Services clustered environments, if Oracle Smart View for Office 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**.

## Two-Way SSL and Problematic Certificates

If two-way SSL is set up with problematic certificates between Oracle Smart View for Office and other Oracle Enterprise Performance Management 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>
```