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# Oracle® Hyperion Smart View for Office, Fusion Edition

Release 11.1.2.0.000 Patch Set 1 (PS1): 11.1.2.1.102

## Readme

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## About This Release

This Readme file describes the defects fixed in this patch and the requirements and instructions for applying this patch.

Caution: You are urged to carefully read and understand the following requirements. Failure to comply may result in applying a patch that can cause your application to malfunction, including interruption of service and/or loss of data. Before installing or applying this patch:

Verify that your system configuration (product version, patch level, and platform) exactly matches what is specified in the Readme.

## Release Type

This release is a Patch Set Update (PSU), and it is a full installation of the product.

## Supported Paths to This Release

You can upgrade to Smart View Release 11.1.2.1.102 from the following releases:

<b>Release Upgrade Path From</b>	<b>To</b>
11.1.2.1.x	11.1.2.1.102
11.1.2.0.x	11.1.2.1.102
11.1.1.3.x	11.1.2.1.102
9.3.3.x	11.1.2.1.102

## Supported Platforms and Release Compatibility with Data Providers

Information about system requirements and supported platforms for EPM System products is available in a spreadsheet format in the Oracle Hyperion Enterprise Performance Management System Certification Matrix. This matrix is posted on the Oracle Fusion Middleware Supported System Configurations page on the Oracle Technology Network (OTN) and listed in the Oracle Business Intelligence product area:

[http://www.oracle.com/technology/software/products/ias/files/fusion\\_certification.html](http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html)

## Prerequisites

To use the new features available in this release, you must install Oracle Essbase 11.1.2.1.102 and Oracle Hyperion Provider Services 11.1.2.1.102. Otherwise, you can use data providers compatible with Smart View 11.1.2.1.x as specified in the Certification Matrix.

## Supported Languages

Information about supported languages for EPM System products is available in a spreadsheet format on the Translation Support tab in the *Oracle Hyperion Enterprise Performance Management System Certification Matrix*. This matrix is posted on the Oracle Fusion Middleware Supported System Configurations page on OTN (listed in the Oracle Business Intelligence product area):

[http://www.oracle.com/technology/software/products/ias/files/fusion\\_certification.html](http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html)

**Note:** The online help and documentation for this release is available only in English.

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## New Features

See *Oracle Hyperion Smart View for Office New Features*.

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## Installation Information

### Installing Directly

1. Download the Smart View zip file from My Oracle Support.
2. Unzip the file.
3. Double-click `smartview.exe` to start the installation wizard. Note: On Windows 7, you must run `smartview.exe` as an administrator.
4. Follow the prompts to install Smart View.
5. Install the online help as follows:
  - a. Open the zip file that you downloaded in step 1.
  - b. From that zip file, open `smartview-user.zip`, which contains the online help system.
  - c. Extract all files to `ORACLE_HOME\common\epmstatic\smartview\docs<language>`, typically `C:\Oracle\middleware\EPMSys11R1\common\epmstatic\smartview\docs\en`

## Installing by Autodeployment

These instructions are for upgrading from Smart View 11.1.2.x only. If you are upgrading from an earlier version of Smart View, use the autodeployment instructions provided in the documentation for the specific release.

### Server Installation

1. Enable autodeployment for Essbase as follows: in Provider Services, navigate to `EPM_ORACLE_INSTANCE\bin` and set these properties in `essbase.properties`:

```
smartview.webservice.autodeploy.force=false
smartview.webservice.autodeploy.warn=false
```
2. Make backup copies of `smartview.exe` and `version.xml` before deploying the replacement files.
3. Download the Smart View zip file from My Oracle Support.
4. Unzip the file.
5. Copy `smartview.exe` and `version.exe` to the location of the Workspace installation, typically:  
`C:\Oracle\Middleware\EPMSys11R1\common\epmstatic\wspace\SmartView`
6. Install the online help as follows:
  - a. Open the zip file that you downloaded in step 3.
  - b. From that zip file, open `smartview-user.zip`, which contains the online help system.
  - c. Extract all files to `ORACLE_HOME\common\epmstatic\smartview\docs\<language>`, typically:  
`C:\Oracle\Middleware\EPMSys11R1\common\epmstatic\wspace\SmartView\docs\en`

### Client Installation

1. In Smart View, select Open, and then Smart View Panel.
2. Connect to Essbase in one of the following ways:
  - Through Shared Connections
  - Through a private connection with the following URL:
    - Essbase: `http://<server>:19000/aps/SmartView`
    - Planning: `http://[server]:19000/HyperionPlanning/SmartView`
    - Financial Management: `http://[server]:19000/hfmofficeprovider/hfmofficeprovider.aspx`
    - Reporting and Analysis: `http://[server]:19000/raframework/browse/listxml` **Note:** Autodeployment does not work for Reporting and Analysis in this release (12870087).
3. When the message "New Smart View client version available" is displayed, click "Click here to Install."
4. In File Download, select Run.
5. If a Microsoft Excel security warning is displayed, select Run.
6. When prompted, confirm the upgrade, select Yes.
7. The installation wizard is displayed; select Next.
8. When prompted, close all open Microsoft applications, and then click OK.
9. In the installation wizard, click Next and follow the prompts to install Smart View.
10. Open Excel.
11. On the Smart View ribbon, select the arrow next to Help, and then About.
12. Verify the new version of Smart View.

## Defects Fixed in this Release

Defect Number	Defect Fixed
• 11736691	<b>General:</b> The <b>Create a new connection</b> selection in Private Connections may not work.
• 11929915	<b>General:</b> Smart View does not support Kerberos Single Sign On (SSO).
• 12320889	<b>General:</b> In Excel, if Smart View is enabled and Excel Transition options are selected, you cannot copy and paste from one workbook to another.
• 12418027	<b>General:</b> When you open a PowerPoint file in read-only mode, you may get an error if another user opens the file for editing.
• 12426806	<b>General:</b> If you select Member and Description for Member Name Display in the Options dialog box, only the description and not the member name is displayed in the grid.
• 12568165	<b>General:</b> When multiple Shared Services and Workspace servers are configured, the Shared Connections drop-down menu in SmartView is not populated.
• 6584712	<b>Essbase:</b> You cannot place a column of members cells between columns of data cells.
• 7311722	<b>Essbase:</b> Dimensions must be added to the grid one by one from the POV toolbar.
• 7375139	<b>Essbase:</b> The Spreadsheet Add-In Formula Fill feature should be available in Smart View.
• 8565994	<b>Essbase:</b> The following options should be enabled in Essbase: <ul style="list-style-type: none"> <li>▪ Zoom in options: Sibling Level, Same Level, Same Generation , Formulas</li> <li>▪ Member Name Display Options: Member Name Only, Member Name, Description Only</li> <li>▪ Replacement Options: Submit Zero</li> </ul>
• 9081793	<b>Essbase:</b> In the Options dialog box, the <b>Zoom In Level</b> options Sibling level, same level, same generation and formulas are disabled.
• 10350800	<b>Essbase:</b> When you select Query Ready in Workspace to export a Financial Reporting report to Smart View, Excel launches, but the report is not displayed
• 10374046	<b>Essbase:</b> Member names are converted to text format after refreshing.
• 10374096	<b>Essbase:</b> If you move a member to a location outside of the grid, you may get an uncorrect message that you must submit the data.
• 10422586, 7422932	<b>Essbase:</b> In free-form mode, you cannot submit data unless you have first refreshed the grid.
• 12330963	<b>Essbase:</b> You may lose formulas in ad hoc grids when you zoom in and out.
• 12412465	<b>Essbase:</b> Level 0 members are missing from the member list in the Member Selection dialog box.
• 12643418	<b>Essbase:</b> When you use a substitution variable in a grid for which the Adjust Column Width option is selected, columns are adjusted to fit the substitution variable rather than the displayed member on the grid.
• 12689838	<b>Essbase:</b> If you try to create a dynamic report to return year-to-date data using a substitution variable to define the month, no data is retrieved.

• 12708474	<b>Essbase:</b> HsGetVariable functions may be lost when you zoom in on a grid.
• 12736127	<b>Essbase:</b> When you open a template in Smart View, columns may be added, shifted, or resized unexpectedly.
• 10237172	<b>Planning:</b> You cannot retain excel formatting on one worksheet and disable it on another worksheet.
• 10416095	<b>Planning:</b> In data forms, if you insert a row, any formulas that reference cells on the same worksheet are not updated when you refresh.
• 12728324	<b>Financial Management:</b> In the Member Selection dialog box, the parents and children of the Scenerio dimension may be displayed repeatedly to apparent infinity.
• 12927087	<b>Financial Management:</b> In ad hoc analysis, when you select and expand the Scenario dimension, the Scenario hierarcy repeats indefinitely.
• 12706283, 12832295	<b>Reporting and Analysis:</b> When you try to export a query-ready report from Workspace to Excel, you may get an error.

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## Defects Fixed in 11.1.2.1.101

Defect Number	Defect Fixed
• 12379701	<b>General:</b> Due to memory issues, Smart View causes PowerPoint to terminate when a table size is increased.
• 10333871	<b>Essbase:</b> In Arabic versions of Smart View, error messages may be displayed in English. Note: Installation of Oracle Enterprise Performance Management Workspace, Fusion Edition Patch Set Exception 11854598 is required for this fix.

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## Defects Fixed in 11.1.2.1

Defect Number	Defect Fixed
• 6541549	<b>General:</b> Default settings cannot be restored after you make changes in the Options dialog box. This issue was fixed by the addition of the Reset button on the Options dialog box.
• 6555697	<b>General:</b> A POV cannot be shared among users. The issues caused by this defect were resolved by the introduction of Smart Slices.
• 6557636	<b>General:</b> When you disconnect from a data source, you are not automatically logged out, which could present a security issue.
• 6562836	<b>General:</b> Within functions, invalid data cannot be set as a zero (0). This issue has been resolved by the #numericzero replacement label option.
• 6578177	<b>General:</b> The VBA function HypMenuVRefresh returns a value of 0 (successful) even when the refresh fails.
• 6585537	<b>General:</b> Excel formatting is lost when you zoom in on a member in the grid.
• 7460233	<b>General:</b> Essbase substitution variables should be available in Visual Explorer.
• 9056869	<b>General:</b> When you drill through to Workspace content from Smart View launched from the Planning web, you are logged off Workspace if you close the browser that displays Smart View.

• 9274973	<b>General:</b> The <b>Refresh All</b> selection should refresh all open worksheets whether or not they are active.
• 9443797	<b>General:</b> Users should be able to select a Provider Services connection from a dropdown menu in the Options dialog box rather than having to enter URLs manually.
• 9488558	<b>General:</b> When working with recursive hierarchy drill-through, if you specify drill-through by generation, the drill-through report is not populated.
• 9494254	<b>General:</b> In Japanese installations, you cannot type into the <b>Enter a new name</b> text box for Smart Slices.
• 9571757	<b>General:</b> If you enter an Excel formula into a data form, the formula cannot be deleted and the data cannot be refreshed until you close and reopen the form.
• 9524060	<b>Planning:</b> On the Member Options page of the Options Dialog box, "Bottom Level" is shown as a valid option for zooming. However, for Planning ad hoc, this option is not supported.
• 10064144	<b>General:</b> Dimensions in Smart View functions are case sensitive.
• 10072438	<b>General:</b> In Office 2010, if you (1) connect from a PowerPoint presentation, (2) open a second PowerPoint presentation, (3) close the first one using the X in the upper right hand corner of the window, then (4) close the second one in the same way, The following error message is returned: "SmartView handled an unknown exception thrown by MS Office." Workaround: close the most recently opened presentations first.
• 10101425	<b>General:</b> In German versions of Smart View, members selected for functions in the Function Builder may disappear.
• 10238919	<b>General:</b> Data cells cannot be linked to cells in a different worksheet.
• 10244321	<b>General:</b> In the Function Builder, if you do not select <b>Add to Function</b> before clicking <b>OK</b> , the members you selected are not added to the function
• 10357091	<b>General:</b> The login screen for Smart View should display the user name of the last user to log in successfully.
• 10379224	<b>General:</b> You may experience issues if you try to connect this release of Smart View to Essbase 11.1.1.3.x.
• 6550105	<b>Essbase:</b> Users should be able to control how columns are resized in the grid. The Adjust column width option in the Options dialog box fixes this issue.
• 6550255	<b>Essbase:</b> When you try to open the Member Selection dialog box with the cursor in a blank cell, you get the error, "Invalid member selection."
• 6571591	<b>Essbase:</b> Smart View should be able to read a digital certificate and use it for authentication.
• 6573504	<b>Essbase:</b> A default alias table should be applied every time users log in. The alias table can be set at the connection level, which resolves this issue.
• 6578093	<b>Essbase:</b> You cannot hide the POV in Smart View. The fix for this issue is the POV toggle button.
• 6581569	<b>Essbase:</b> In ad hoc grids, data in cells that reference data in a different worksheet may not be submitted when you submit data.
• 6585498	<b>Essbase:</b> When you copy data points to PowerPoint from Excel, Excel formatting is not carried over.
• 7121680	<b>Essbase:</b> In Word or PowerPoint, when you use the Copy Data button in a function grid from a Smart Slice, you get an error message and cannot copy.

• 7460808	<b>Essbase:</b> In Visual Explorer, the outline order cannot be preserved when you sort account dimensions.
• 8551847	<b>Essbase:</b> The Member Selection dialog box cannot be re-sized.
• 9260420	<b>Essbase:</b> Japanese values are not displayed in the task list.
• 9491559 9492822	<b>Essbase:</b> When working with recursive hierarchy drill-through, if you specify drill-through by level and provide a level number, users are able to drill-through on all levels, not only the one you specified.
• 9507874	The Member Selection dialog box invoked from the Query Designer does not display member names if the member names are double-byte Japanese characters.
• 9686630	<b>Essbase:</b> The Edit Comment window is not displayed by default if <b>Always show on refresh</b> is not checked. This can result in users being unaware that a sheet contains old data. The fix is for the Edit Comment window to always be displayed when sheets are refreshed.
• 9727567	<b>Essbase:</b> VBA functions are case-sensitive and return -42 (invalid alias) if you use the wrong case.
• 9886656	<b>Essbase:</b> If the POV contains attribute dimensions, you get a "type mismatch" error when you retrieve data.
• 9924543	<b>Essbase:</b> The tooltip that contains connection and POV information is not displayed for data points copied into Word or PowerPoint. To enable the fix for this issue, in the registry, go to HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion \Explorer\Advanced\EnableBalloonTips and set the value to 1.
• 9947259	<b>Essbase:</b> If you alter the positions of rows and columns in an ad hoc grid and then try to run a drill-through report, you get this error: "Error: Operation is not valid on member cell. Please make a different selection and try again."
• 10101032	<b>Essbase:</b> VBA functions HypSetConnAliasTable() and HypSetAliasTable() are case-sensitive and return -42(invalid alias) if you use the wrong case.
• 10247381	<b>Essbase:</b> The Smart View function HsDescription should be enabled for Essbase.
• 10374160	<b>Essbase:</b> Data cannot be submitted in accounting format.
• 10374101	<b>Essbase:</b> Once connected to a worksheet, you cannot disassociate from it.
• 6550022	<b>Planning:</b> Page members are reverted to first members after you refresh, disconnect, close, and open in Excel.
• 6592833	<b>Planning:</b> Data validation cannot be done in Smart View as it is in Planning.
• 7195917	<b>Planning:</b> In data forms, not all dimensions are displayed in the Smart View POV. The POV can now be docked vertically, which enables the display of more dimensions.
• 8826709	<b>Planning:</b> The VBA functions HypCreateConnectionEx, HypConnect, and HypExecuteCalcScriptEx should be available for Planning.
• 9443605	<b>Planning:</b> You cannot use ad hoc mode in Planning without first selecting a data form.
• 9767765	<b>Planning:</b> If you change the name of a dimension, the new dimension name does not appear in the Copy Version dropdown menu.
• 9884503	<b>Planning:</b> Data forms that contain member names with spaces or characters such as "@" and "&" may fail to load into Smart View.
• 9955285	<b>Planning:</b> In Smart View, you cannot overwrite formulas in Planning web forms.

• 9524060	<b>Planning:</b> On the Member Options page of the Options Dialog box, "Bottom Level" is shown as a valid option for zooming. However, for Planning ad hoc, this option is not supported.
• 10023069	<b>Planning:</b> Values are not updated in data forms in cells with formulas that reference another worksheet.
• 10129470	<b>Planning:</b> In ad hoc mode in Excel, the Member Selection displays only members defined in the Web form and not all members to which the user has access.
• 10135917	<b>Planning:</b> Folders with names in Japanese characters cannot be opened in Smart View.
• 10152749	<b>Planning:</b> When Planning data forms that display aliases are printed out from Smart View, member names rather than aliases are printed in the Page section.
• 10163835	<b>Planning:</b> After disabling Smart View, you get the error "Smart View handled an unknown exception thrown by Microsoft Office" in Word and PowerPoint.
• 6533087	<b>Financial Management:</b> Data is displayed in decimal format even if a rule specifies it to be displayed in percentage format.
• 6584437	<b>Financial Management:</b> In Excel versions earlier than 2007, the Hyperion menu may not be displayed.
• 9750670	<b>Financial Management:</b> HsGetValue connects to the default connection even if a different connection is specified.
• 9842896	<b>Financial Management:</b> You cannot open more than one data form at a time.
• 9858172	<b>Financial Management:</b> Functions that refer to a non-active application display invalid data rather than displaying the #NOCONNECTION label.
• 9803313	<b>Financial Management:</b> The Smart View migration utility adds invalid quotation marks and semicolon when converting hfmval to HsGetValue. The fix for this issue is the introduction of the VBA function HypMenuVMigrate.
• 9966186	<b>Financial Management:</b> The Version Info on the Help About screen is incorrect.
• 10030228	<b>Financial Management:</b> When you copy data from a Web form in Excel 2007 and paste it to another Web form connected to a Financial Management application, you get this error message: "BorderAround method of Range class failed" error is displayed."
• 10186667	<b>Financial Management:</b> In languages other than English, Smart View does not create the required "&" character in HsGetValue formulas.
• 10328972	<b>Financial Management:</b> Ad hoc queries in Smart View for Financial Management cannot exceed the Excel limit of 65536 rows.
• 8474703	<b>Reporting and Analysis:</b> If you have a worksheet open in Excel and import a Financial Reporting report in query ready mode, the imported report should be displayed on a new worksheet, but instead, it replaces the open worksheet.
• 9320068	<b>Reporting and Analysis:</b> If you use Excel 2007, you may be required to activate the connection each time you import a Financial Reporting report. This happens when "Excel 97-2002 Workbook (*.xls)" is selected under Save Workbooks in Excel Options.
• 10227215	<b>Reporting and Analysis:</b> Financial Reporting and Interacting Reporting reports are not inserted into Word at the location of the cursor.
• 10303397	<b>Reporting and Analysis:</b> When you click the <b>Refresh</b> button on the POV, you get this error message: "PLEASE USE REFRESH MENU OR REFRESH BUTTON FROM MAIN TOOLBAR TO CONTINUE THIS OPERATION."

• 8653639	<b>Hyperion Enterprise:</b> Converting HpVal formulas to Smart View HsGetValue may result in #Invalid errors.
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## Defects Fixed in Release 11.1.2.0

Defect Number	Defect Fixed
• 6547753	<b>General:</b> The HsGetValue and HsSetValue functions used in the Function Builder and Copy Data Points feature should support the use of aliases as well as member names.
• 6676549	<b>General:</b> The thousands separator disappears when you perform a pivot operation.
• 8207401	<b>General:</b> During ad hoc analysis, if you change POV values from base values and refresh, refresh works as expected. However, if you then enter free form mode and refresh, all POVs are set back to base values. Workaround: Select or reselect the POV members after all free form processing is done.
• 8244313	<b>General:</b> If Repeat Member Labels Suppression is enabled in Smart Slice preferences, incorrect data may be returned when you refresh after performing an Excel delete.
• 8277341	<b>General:</b> The Data Source Manager is partially hidden by a phantom of its shortcut menu after the menu is closed. In this release, the Data Source Manager has been replaced by the Smart View Panel, and this is no longer an issue.
• 9033495	<b>General:</b> In worksheets with multiple functions, performance may be very slow.
• 6584628	<b>Essbase:</b> Dimensions are not displayed in the same order as they are in the Essbase outline.
• 7110800	<b>Essbase:</b> When you attempt to use Visual Explorer, you may get an error: "Cannot perform cube view operation. OLAP error (1042017): Network error: The client or server timed out waiting to receive data using CP/IP. Check network connections. Increase the NetRetryCount and/or NetDelay values in the ESSBASE.CFG. Update this file on both client and server. Restart the client and try again."
• 7122440	<b>Essbase:</b> Function grids and tables in the Report Designer incorrectly use formatted text from Essbase instead of applying the format set as part of the Smart Slice.
• 8433187	<b>Essbase:</b> Numeric formatting in some columns may be removed when you zoom out if there are comments next to the grid.
• 7459181	<b>Essbase:</b> When you attempt to use member selection from the Function Builder in a query created from a Smart Slice, members may not be displayed correctly. Workaround: finish all Function Builder tasks for the connection before inserting Smart Slices for that session.
• 8441706	<b>Essbase:</b> The VBA function HypFindMember returns numeric values for Generation Name and Level Name output parameters instead of the actual names.
• 8464691	<b>Essbase:</b> For outlines that contain duplicate members, you must press F2 twice to enter edit mode.
• 8478243	<b>Essbase:</b> To place a member cell into edit mode, you must press F2 twice.
• 8622787	<b>Essbase:</b> When you open or close Excel 2003 SP3, you may get the following error: This error in SmartView happens when starting or closing Microsoft Excel 2003: "Microsoft Visual Basic" "Compile error in hidden module: HsTBarMod"

• 8633958	<b>Essbase:</b> If the regional setting is German, which uses a comma as decimal separator and period as thousands separator, any value entered into Excel before a refresh is garbled into an unusable number after the refresh.
• 8944855	<b>Essbase:</b> On 64-bit Windows operating systems, the Connection Manager is blank.
• 9060771	<b>Essbase:</b> When you add a numeric member to the POV, the formatting is lost after you refresh.
• 9324827	<b>Essbase:</b> The VBA function HypCell does not return the proper "missing data" label in cells with missing data.
• 8265958	<b>Essbase:</b> You may receive an "Internal Provider Services error" message when you opt to suppress rows that contain missing data.
• 7182039	<b>Planning:</b> Planning user variables cannot be used in Smart View.
• 7237902	<b>Planning:</b> In French installations, Planning Web data forms that contain Smart Lists may cause errors when they are opened.
• 8314921	<b>Planning:</b> The "Within selected group" option is not supported for zooming in Planning Web grids.
• 8996731	<b>Planning:</b> When you open a Planning form from a shortcut menu in the form, the new form incorrectly opens with default values instead of the values of the selected member.
• 9138441	<b>Planning:</b> When you open a saved Planning sheet and enter data, the cell border incorrectly become yellow.
• 6924957	<b>Financial Management:</b> Dimension members cannot be changed on multiple sheets simultaneously. This can be done by cascading, which is now possible in Financial Management.
• 7490769	<b>Financial Management:</b> An initial refresh is required before submitting data.
• 7555799	<b>Financial Management:</b> Shortcut menus are not displayed in the correct cell.
• 8579772	<b>Financial Management:</b> In Smart View, if you try to select a WDEF in a folder that contains Cyrillic characters, you receive an "Invalid Parameter" error and cannot select or open the form.
• 8880033	<b>Financial Management:</b> In data forms opened in Smart View, some rows may be merged.
• 9341968	<b>Financial Management:</b> When you load a Data Entry Form that contains a row with account ICP and Custom1, the first refresh causes duplicate menu items in the POV Bar to appear (Year and Custom4).
• 8619424	<b>General:</b> When you select Cell Text, you receive an error: "Grid has been manually edited. Please refresh before reapplying the operation."
• 9368391	<b>General:</b> In Financial Reporting, Disconnect All or Invalidate SSO selections do not work.

## Known Issues

Defect Number	Known Issue
6566082	<b>General:</b> In data cells, percentage values are displayed differently upon submission depending on whether they are entered directly or as a formula. This happens because Excel formulas overwrite entered data. Workaround: Enter the number preceded by an equal sign, for example, =2.
6568645	<b>General:</b> In PowerPoint, you may not be able to access Smart View functions through Microsoft smart tags. Workaround: Retype "smartview" (the Smart View smart tag) to cause PowerPoint to reload the smart tag.
6576419	<b>General:</b> When installing on Vista, you are not prompted for administrator privileges at the beginning of installation as expected. Instead, you get an error message during installation that you do not have sufficient privileges. Workaround: right-click smartview.exe and select Run as administrator. You will then be prompted to supply administrator credentials.
6579310	<b>General:</b> When you open a saved free form workbook and change the Member Name Only or Member Name and Description setting in the Options dialog box before refreshing, the member display options do not work. Workaround: refresh the grid before entering Member Name Only or Member Name and Description.
6909914	<b>General:</b> Because of a Microsoft Word limitation, if the value of the system-defined option "List separator" is set to one of the regular expression anchor characters (including but not limited to "^" and "\$"), Word might fail to insert fields of type "Formula," which will cause failure of copy and paste. Workaround: Go to Control Panel, then Regional and Language, then Options, then Standards and Formats, then Customize, and then Numbers, and change the list separator option.
7408376	<b>General:</b> Replacement labels for missing data and other preferences specified in the Smart Slice Options dialog box during Smart Slice creation are not applied to function grids based on the Smart Slice. Instead, the options specified by Smart View users in the Options dialog box are applied to function grids.
7432260	<b>General:</b> You cannot resize columns in table reports. Workaround: This is expected behavior; to enable column resizing, do the following. <ol style="list-style-type: none"> <li>1. Insert a table on the grid and refresh.</li> <li>2. Enter Excel Design Mode (available from the Excel Developer ribbon or Visual Basic toolbar).</li> <li>3. Right-click the table and select Microsoft Office Spreadsheet 11.0 Object &gt; Command and Options.</li> <li>4. From the Properties dialog box, select the Protection tab, then select Resize Columns.</li> <li>5. Select the Sheet tab, then select Column Headers.</li> <li>6. Click OK.</li> </ol>
7447990	<b>General:</b> Unlike Workspace, the Smart View Panel does not display hidden files or files with duplicate names. Therefore, file counts may differ between Workspace and Smart View.
7524675	<b>General:</b> Do not change the file extension when you save an Excel workbook with the Get function that has been retrieved through simulation workbooks in the Smart View Panel.

8312407	<b>General:</b> If you open a workbook in Excel 2003 that was previously saved in Excel 2007 as an .xlsx file, you may get an error message. This is a Microsoft issue. Workaround: Save the file in Excel 2007 with an .xls extension; it will then open properly in Excel 2003.
9798801 8839088 7634745	<b>General:</b> Do not uninstall this version of Smart View and then install a previous version of Smart View. If you must, then delete the registry key HKEY_CURRENT_USER\Software\Microsoft\Office\Outlook\Addins\Hyperion.Common Addin.
9032135	<b>General:</b> Sheet names may be truncated if they are longer than 31 characters; this is an Excel limitation.
9083246	<b>General:</b> When you try to close Excel, it may terminate abruptly. This is a Microsoft issue. Ensure that you save your work before closing Excel.
9283525	<b>General:</b> To use Outlook with Smart View, Visual Basic Scripting Support must be installed and Run From My Computer must be selected in Outlook. See Outlook product documentation for information.
9315130	<b>General:</b> Microsoft security update KB969604 for Office 2007 breaks Smart View functionality in Word. See Microsoft documentation for information about fixing this problem.
9439925	<b>General:</b> In Microsoft Word, slider controls may be resized in reports created in the Report Designer.
9477466	<b>General:</b> When you perform drill-through from an Essbase Studio-sourced cube to FDM, if the EPM System Single Sign-On (SSO) token expires before the sessions of all products involved expires (Workspace, Analytic Provider Services, Essbase, Essbase Studio, FDM), the following message is displayed:  "Error: An error occurred logging on to the system using single sign-on. Please contact your administrator. Error: 2067 - You do not have access to the application!" Workaround: Log in again to Workspace from Smart View.
9691355	<b>General:</b> When you delete a worksheet that containing a reporting object from the Report Designer, Excel may terminate abruptly. This is a Microsoft issue.
10046845	<b>General:</b> Sliders in Smart Slice reports do not display properly after the report is closed and reopened. This happens because of a Microsoft security setting for ActiveX controls and OLE objects in Office 2003 and 2007. See the Microsoft support site for information about working around this issue.
10086585	<b>General:</b> In Excel 2003, if you dock the POV to the right or to the left, the POV dimensions disappear, and only the refresh button remains.
10159874	<b>General:</b> If you launch Excel after having installed Smart View, started Excel with Smart View loaded, and then uninstalled Smart View, the following warning dialog is displayed:  'D:\Oracle\SmartView\Bin\HsTbar.xla' could not be found. Check the spelling of the file name, and verify that the file location is correct. If you are trying to open the file from your list of most recently used files, make sure that the file has not been renamed, moved, or deleted.
11068363	<b>General:</b> It may take more than one attempt to log into the Workspace server for Crystal Ball.
11659670	<b>General:</b> Interfaces in Arabic versions of Smart View may contain layout, alignment, and other display issues.

11683285	<b>General:</b> When you upgrade from Internet Explorer 6 to 7 or 8, the default timeout is reduced from 3 minutes to 30 seconds. This setting is leveraged by Smart View and may cause timeout issues on long-running queries. Workaround: Increase the default keep-alive time-out value in Internet Explorer as described on the Microsoft support site.
11696583	<b>General:</b> On Vista, Windows 2008, and Windows 7 operating systems, Excel may terminate abruptly upon launching after you install Smart View. Workaround: Turn off "User Access Control" in User Accounts, available from the Control Panel.
11934177	<b>General:</b> If Excel transition options are enabled, many Excel functions, including copy/paste and automation API calls, do not work. This is a Microsoft limitation.
12797381	<b>General:</b> You cannot connect Smart View 11.1.2.x to Provider Services 11.1.1.3.500 or later through a private connection without first adding Essbase to the common provider. In addition, you cannot add Essbase to Provider Services from Administrative Services.
12858015	<b>General:</b> When you perform web launch from Financial Reporting with a report that has multiple members in the POV, the POV selection is lost in Smart View.
8763144	<b>Essbase:</b> In the Query Designer, Smart View generates a syntax error when you perform a descendants or top/bottom query on a member whose name contains a dot (.).
6573303	<b>Essbase:</b> Calculation scripts that run from Essbase may not run from Smart View. This can happen if you have restricted calculation access in Smart View. Calculation scripts are run against the connected database.
7111403	<b>Essbase:</b> When you perform an Undo, only the previously selected POV is saved, and recently selected members are removed. Workaround: instead of using Undo, use Pivot to POV, which will replace all members on that dimension to the POV.
8305216	<b>Essbase:</b> When you perform Smart View operations in a Smart Slice and refresh, you may get an Assertion Failed error message if you try to close Excel by clicking the X in the upper right corner. The message is harmless; you can click OK to close it.
8494250	<b>Essbase:</b> When you try to use Find in the Member Select dialog box, Excel may perform excessively slowly or freeze if the dimension contains more than approximately 100,000 members.
10097094	<b>Essbase:</b> If you use merged cells, you may encounter the following issues:  When there are merged cells in a row dimension, proper merging is not maintained when you zoom in on the top cell of the innermost row dimension.  When you use the Formula/Format Fill option with merged cells in a row dimension, Formula/Format Fill does not fill cells properly when you zoom in on the innermost row dimension.
11078053	<b>Essbase:</b> Tables inserted from the Report Designer into Microsoft Word may not work properly.
12738144	<b>Essbase:</b> If you switch the alias table to German, you may get an error. Workaround: start ad hoc analysis before switching the alias table to German.
12884154	<b>Essbase:</b> When you select Pivot from the Essbase ribbon to pivot a row member, the member is moved instead to the POV toolbar.
12890030	<b>Essbase:</b> If you change alias tables, members that you drag from the POV toolbar to the grid may be lost.
12879435	<b>Essbase:</b> A member name in the grid may be displayed as its alias instead of as its name in the Query Designer. However, despite the inconsistent names, the query will execute properly.

12903872	<b>Essbase:</b> When you change the alias table, the correct aliases may not be displayed for all members in the POV toolbar.
12909636	<b>Essbase:</b> The POV toolbar may disappear after you refresh a saved worksheet. Workaround: When ad hoc analysis is done, select POV on the Essbase ribbon to display the POV toolbar.
12917562	<b>Essbase:</b> you cannot use the POV Manager to create a starting point.
12962636	<b>Essbase:</b> If you select both Retain Numeric Formatting and Use Excel Formatting options, formatting may be lost in ad hoc operations. Workaround: Clear both Use Excel Formatting and Retain Numeric Formatting, and then re-select Use Excel Formatting.
6533549	<b>Planning:</b> The summary time period may be marked as a dirty cell, even if it should not be.
6549255	<b>Planning:</b> If a member cell contains a formula that calculates the value for a summary time period, that cell should be locked, but instead, Smart View may mark it as dirty if the data for the member is modified.
7462718	<b>Planning:</b> If you have cascaded a report created from a <i>new</i> Smart Slice containing at least one function grid and a control (slider or POV) across an Excel workbook, Excel may terminate abruptly if you choose not to save the cascaded report.
7492465	<b>Planning:</b> Smart View does not permit the use of #Missing in Calc Manager rules, even if the variable is set to permit #Missing.
7641072	<b>Planning:</b> In Planning data forms previously saved in an Excel workbook, expanding a member may result in data that is incorrectly displayed as zero or "No Access." Workaround: To display the correct data, refresh the worksheet or submit data.
8938258	<b>Planning:</b> Mass allocation works only on data forms; it does not work in ad hoc grids. The Smart View documentation does not state this but will be corrected in an upcoming release.
9261943	<b>Planning:</b> Tasks imported into Outlook via Smart View can cause errors if Outlook is configured for Oracle Beehive. Workaround: In Outlook Send/Receive settings, select None for the Task List folder. See the Outlook documentation for information.
9414544	<b>Planning:</b> When you are connected to a Planning provider through shared connections and try to add a server via Provider Services, you may get the following error message: "Check if the Server / URL you provided is correct and if the server is up and running." This is an SSL certificate issue. In the enterprise SSL offloading setup, connections from Provider Services to Planning must be HTTP and not HTTPS.
9440181	<b>Planning:</b> Read-only Dynamic Calc cells may be displayed incorrectly as writable in offline data forms with the suppress missing option set to true.
9445303	<b>Planning:</b> The Offline wizard continues to be displayed in English when you change to a different language in Smart View.
9445722	<b>Planning:</b> Planning servers added via Add new server from the Smart View Panel are not displayed in the Smart View Panel in Outlook.
9455001, 9481367	<b>Planning:</b> If Suppress Rows is enabled in the Planning data form, new rows of data created in offline mode by means of a business rule are not saved when you synchronize back to the server.
9458911	<b>Planning:</b> If you try to launch Smart View from Planning on Windows 7 or Vista, you receive an error: "Invoke method could not..." This happens when you are using Internet Explorer in protected mode. Workaround: Disable protected mode as described in Microsoft documentation.

9481405	<p><b>Planning:</b> If the option Keep data changes made in offline mode is unselected, then any changes made in an offline data form should be overwritten with data from the Planning web when you refresh. However, if the suppress missing rows option is selected for the data from, these changes are retained when you refresh.</p>
9783131	<p><b>Planning:</b> When you open a 2003 Excel spreadsheet from the File menu, the spreadsheet flickers and you cannot copy and paste data from one worksheet to another. This happens when one or both of the Lotus compatibility setting - Transition formula evaluation and Transition formula entry are enabled in Excel. Workaround: Disable both settings. The following macro disables these settings on all worksheets.</p> <pre> Public Sub SVSubmitAllSheets()     Dim wk1, wk      Set wk1 = ActiveSheet      For Each wk In Sheets         wk.Activate         wk.TransitionExpEval = False         wk.TransitionFormEntry = False      Next wk     wk1.Activate      .  End Sub </pre>
10086585	<p><b>Planning:</b> In Excel 2003, if the POV is docked to the right or left, the POV dimensions are not displayed. This is a Microsoft limitation.</p>
10225866	<p><b>Planning:</b> In the Outlook 2007 shortcut menu for tasks, the Assign Task and Mark Complete items may work only intermittently.</p>
10225958	<p><b>Planning:</b> Closing the Smart View Panel in Outlook may take a long time after you open a task from a large task list. The reason is that task lists are always refreshed upon closing, and the time needed to refresh depends, in part, on the number of tasks in the task list.</p>
10333871	<p><b>Planning:</b> In Arabic versions of Smart View, error messages may be displayed in English. This happens because Workspace does not support Arabic in this release. Workaround: use a private connection.</p>
10379821	<p><b>Planning:</b> Smart View cannot be connected to Planning through Provider Services in this release. You can connect to Planning directly.</p>
11898135	<p><b>Planning:</b> Planning data forms fail to open if you are using Planning 11.1.2.0 with Smart View 11.1.2.1.</p>
11935907	<p><b>Planning:</b> When you try to open a Planning web form in Smart View through Workspace, you may get this error: "Web launch operation has been cancelled." This happens if Essbase has not been added as a server in Shared Connections. Workaround: Open the Smart View Panel in Smart View and add an Essbase server as described in the online help or "Adding Essbase Servers" in chapter 2 of the <i>Smart View User's Guide</i>.</p>
12352242, 12861501	<p><b>Planning:</b> You may not be able to launch a web Planning form in Smart View in Firefox 4.0 or 5.01.</p>
12877317	<p><b>Planning:</b> If you connect to Planning through Provider Services in Release 11.1.2.1 or later, ad hoc analysis, the Query Designer, and copy/paste functionality is not available. Workaround: Connect directly to Planning.</p>

7608591	<b>Financial Management:</b> In German operating systems, multiple zeroes may be incorrectly appended to numbers that are entered into the Cell Text field. For example, 15 may become 1500000. To avoid this problem, precede numbers that you enter into Cell Text with a single quotation mark, for example, `15.
9296160	<b>Financial Management:</b> POV controls inserted into a report may be disabled when you close and reopen the document containing the report. This happens when ActiveX controls are disabled. Workaround: Enable ActiveX controls in Microsoft Office.
9382988	<b>Financial Management:</b> In the Customize Field dialog box, shortcut keys do not work. Workaround: To navigate fields in this dialog box, use the tab key.
11741227	<b>Financial Management:</b> Financial Management applications with Entity member names that have only one letter (for example, EastRegion.A) produce errors and you will not be able to use the application or perform other operations. Ensure that your Entity member names have more than one letter.
12799724	<b>Financial Management:</b> If you try to open a linked form that is already open, you may get an error. Workaround: Use different names for linked forms.
8725279	<b>Financial Data Quality Management:</b> Financial Data Quality Management does not support alias tables for Essbase drill-through.
11687672	<b>Financial Close Management:</b> Tasks are opened in the language selected for the browser rather than the language selected for Smart View. Workaround: Use the same language setting for the browser and Smart View.
7136682	<b>Oracle BI EE:</b> If you select <b>Ad Hoc</b> on the Data Source toolbar and then re-use an existing grid, you receive the message, "The worksheet contains data from prior operation. Do you want to clear the contents of the sheet? Select NO will perform a free form operation with sheet contents." However, if you do select No, rows are replaced with data cells and the grid is unworkable. Workaround: use Refresh instead of Ad Hoc Analysis. Use Ad Hoc Analysis only when you want to treat the worksheet as freeform.
7420494	<b>Oracle BI EE:</b> Null passwords are not permitted. Workaround: Use a space character in the password field.
8222197	<b>Oracle BI EE:</b> When you use the POV refresh button in a Smart Slice, the data may change. This should not happen unless the POV has been changed.
6575786	<b>Reporting and Analysis: Refresh</b> and <b>Refresh All</b> do not work if two pages of a Web Analysis report are imported sequentially. Workaround: Use <b>All Pages</b> to import multiple pages of a report.
6908330	<b>Reporting and Analysis:</b> Reporting and Analysis documents are not displayed in Import Workspace Document Folder Tree if Workspace is under WebSeal and configured for a context path (http://<server>:<port>/<context path>/workspace) other than the default (http://<server>:<port>/workspace).
6940642	<b>Reporting and Analysis:</b> Filters are not updated in POV toolbar after you edit them; however, data is changed successfully.
7674839	<b>Reporting and Analysis:</b> When you import a Financial Reporting report into Smart View and refresh, the worksheet becomes solid black, except for the cells imported from Financial Reporting. Workaround: From the Excel Tools menu, select Options. On the Color tab, click Reset and then OK.
8443524	<b>Reporting and Analysis:</b> If you have an open Excel document when you export a Financial Reporting report in query-ready mode to Excel, the open Excel document will be overwritten without warning. Workaround: save and close any Excel documents before exporting.

9743859	<b>Reporting and Analysis:</b> Web Analysis reports imported from Workspace to PowerPoint 2010 do not open correctly. Workaround: Save the report file as an .html file. Then open directly in PowerPoint; do not try to import from Workspace. This issue does not apply to versions of PowerPoint other than 2010.
10330869	<b>Reporting and Analysis:</b> Because Financial Reporting is not available in Arabic or Norwegian in release 11.1.2.1, the Import Workspace Document wizard is displayed in English in place of these languages.
11688307	<b>Reporting and Analysis:</b> If different languages are set for Smart View and the browser, you may get an error when you import a Reporting and Analysis report into Smart View. Workaround: Use the same language setting for the browser and Smart View.
12564498	<b>Reporting and Analysis:</b> When you export an Interactive Reporting report from Internet Explorer into Smart View 11.1.2.1.x, the Smart View ribbon disappears in Excel. Workaround: Open Excel before exporting from Internet Explorer.
12870087	<b>Reporting and Analysis:</b> Autodeployment does not work for Reporting and Analysis.
12880686, 12921841	<b>Reporting and Analysis:</b> You may receive an "Error accessing import data" message when you try to import a Web Analysis report into Excel, Word, or PowerPoint 2007 or 2010. Workaround: Launch Web Analysis reports from Internet Explorer.

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## Documentation Updates

### **Correction to *Smart View User's Guide* and Online Help**

The following information should be added to the "Zooming and Formatting" and "Using Excel Formatting" sections of Chapter 5, "Ad Hoc Analysis":

- To preserve the merged cell formatting during ad hoc operations (except Pivot), the Use Excel Formatting and Preserve Formulas and Comments on Adhoc Operation options must be selected.
- To replicate the merged cell formatting during ad hoc operations (except Pivot), the Use Excel Formatting, Preserve Formulas and Comments on Adhoc Operation and Formula/Format Fill options must be selected.

### **Accessing EPM System Product Documentation**

The most recent version of each EPM System product guide is available for download from the Enterprise Performance Management System Documentation area of the OTN Web site (<http://www.oracle.com/technology/documentation/epm.html>). For faster access to the documentation, you can also use the Enterprise Performance Management Documentation Portal (<http://www.oracle.com/us/solutions/ent-performance-bi/technical-information-147174.html>) which also links to EPM Supported Platform Matrices, My Oracle Support, and other information resources.

Deployment-related documentation is also available from the Oracle E-Delivery Web site ([http://edelivery.oracle.com/EPD/WelcomePage/get\\_form](http://edelivery.oracle.com/EPD/WelcomePage/get_form)).

Individual product guides are available for download on the Oracle Technology Network Web site only.

## Copying and Pasting Code Snippets from PDFs

When you cut and paste code snippets from a PDF file, some characters can be lost during the paste operation, making the code snippet invalid.

Workaround: Cut and paste from the HTML version of the document.

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## Accessibility Considerations

It is our goal to Oracle products, services, and supporting documentation accessible to the disabled community. Oracle Hyperion Enterprise Performance Management System supports accessibility features, which are described in the product documentation. This readme file is accessible in this release in HTML format.

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