



# ORACLE® SMART VIEW FOR OFFICE

*Release 11.1.2.5.410*

Readme

ORACLE®

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## Purpose

This document includes important, late-breaking information about this release of Oracle Smart View for Office. Review this Readme thoroughly before installing the Oracle Enterprise Performance Management System and Smart View.

## New Features in This Release

See the *Oracle Smart View for Office New Features*. For new features relating to installation, architecture, and deployment changes in this release, see “New Features in this Release” in the *Oracle Enterprise Performance Management System Readme*.

Use the Cumulative Feature Overview tool to review the list of new features added between earlier releases. This tool enables you to identify your current products, your current release version, and your target implementation release version. With a single click, the tool quickly produces a customized set of high-level descriptions of the product features developed between your current and target releases. This tool is available here:

<https://support.oracle.com/oip/faces/secure/km/DocumentDisplay.jspx?id=1092114.1>

### New Enterprise Performance Reporting Cloud Service Extension

This release of Smart View supports an extension for a new product, Oracle Enterprise Performance Reporting Cloud Service.

With Smart View and the Enterprise Performance Reporting extension, you use familiar Microsoft Office tools to access and work with data in Enterprise Performance Reporting.

For a brief overview of Enterprise Performance Reporting in Smart View, see the 11.1.2.5.410 version of the *Oracle Smart View for Office New Features*. For information on using Enterprise Performance Reporting with Smart View, see the 11.1.2.5.410 version of the *Oracle Smart View for Office User's Guide*. The 11.1.2.5.410 documentation is available on the [Oracle Help Center](#). Navigate to **Applications**, then **Business Analytics**, and then **Smart View for Office**.

Information about Enterprise Performance Reporting, when generally available, is on the [Oracle Help Center](#). Navigate to **Applications**, and then **Cloud**. Documentation for Enterprise Performance Reporting is listed in the **Enterprise Performance Management** group.

# Installation Information

## Subtopics

- [Installation Guidelines](#)
- [Installing from Oracle Technology Network or My Oracle Support](#)
- [Installing by Autodeployment in EPM System](#)
- [Installing from EPM Workspace](#)
- [Installing from Oracle BI EE](#)
- [Running Silent Installations](#)
- [Downloading Help for Local or Web Server Installation](#)

Smart View 11.1.2.5.410 uses a single installer for 64-bit and 32-bit versions of Microsoft Office.

**Note:** 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.

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

## Installation Guidelines

The guidelines in this topic should be considered when you install the Smart View client.

Starting with the 11.1.2.5.400 release, you can install Smart View 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 [Known Issues, “Installation” on page 16](#) for information on installation issues.

**Table 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.

Installation Context	Scenario	UAC-Enabled	Result
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 8 or 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.
- 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).

## Installing from Oracle Technology Network or My Oracle Support

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

- 1 **Before you begin, close all Microsoft Office applications.**
- 2 **Download the Smart View zip file from either OTN or MOS:**
  - From OTN:  
<http://www.oracle.com/technetwork/middleware/smart-view-for-office/overview/index.html>
  - From MOS:  
<https://support.oracle.com/epmos/faces/MosIndex.jspx>

- 3 **Unzip the file to a temporary location.**
- 4 **Double-click SmartView.exe to start the installation wizard.**
- 5 **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.

- 6 **When installation is complete, click OK.**

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

## Installing by Autodeployment in EPM System

### Subtopics

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

These instructions are for upgrading from Smart View 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 Smart View:

#### 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:** In the Financial Management Web Server Configuration Utility for Smart View, select **Always force client to upgrade**.
- **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 [step 2](#) in “Installing from Oracle Technology Network or My Oracle Support” on page 4.

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 [step 6, Option B](#), then your users will be directed to OTN for the Smart View download. In that case, your users should follow the instructions for OTN download and installation in “[Installing from Oracle Technology Network or My Oracle Support](#)” on page 4.

If you did not choose the [epmstatic Option](#) or [Web App Server Option](#) in [step 6, 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:
  - 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:** 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

### Subtopics

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

### Workspace Setup

- To set up the Workspace environment for the updated Smart View 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 [step 2](#) in “[Installing from Oracle Technology Network or My Oracle Support](#)” on page 4.
  - 3 Unzip the downloaded file to a temporary location.
  - 4 Copy `SmartView.exe` and `version.xml` to the location of the EPM Workspace installation, typically:

```
C:\Oracle\Middleware\EPMSystem11R1\common\epmstatic\wspace\SmartView
```

### Client Installation

- To install Smart View from EPM 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

### Subtopics

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

## Configuring the Oracle BI EE Analytics Home Page

**Note:** Configuring a custom download link for the Smart View installer applies to Oracle BI EE 11.1.1.7.1 and later versions, and might not be available in earlier versions.

The Smart View version packaged with Oracle Business Intelligence Enterprise Edition may be out of sync with the Oracle Business Intelligence server or with the latest available version of Smart View.

You can configure the **Smart View for MS Office** link on the **Download BI Desktop Tools** drop-down list 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, such as the Smart View download page on Oracle Technology, where the latest version of Smart View is always available
- An internal URL, such as internal web page or intranet site 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 Oracle BI EE Analytics Home Page

► To install Smart View from Oracle BI EE Home:

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

## Running Silent Installations

Administrators can enable silent installations—installations that do not require settings to be specified each time—for Smart View. The silent installation command can be included in scripts to automate installation.

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.

Before you begin, follow the procedure in [“Installing from Oracle Technology Network or My Oracle Support” on page 4](#) to download the Smart View installation zip file and unzip it to the folder you will be working in.

➤ To run silent installations:

- 1 **Open a command prompt.**
- 2 **Navigate to the directory of the Smart View installer.**
- 3 **Run one of the following commands:**

- 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 run silent installation and log the installation sequence:

- 1 **Open a command line prompt.**
- 2 **Navigate to the directory of the Smart View installer.**
- 3 **Run `SmartView.exe/s/v" INSTALLDIR=D:\SmartView /L*v c:\install.log"`**

## Downloading Help for Local or Web Server Installation

After installing Smart View, 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 Release 11.1.2.5.410.

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

- *Oracle Smart View for Office Accessibility Guide*. See “Installing and Configuring Help Locally.”
- *Oracle Smart View for Office User's Guide*, Appendix A. See “Installing and Configuring Help Locally or on a Web Server.”

► 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:**

20974168

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:**

- *Oracle Smart View for Office Accessibility Guide*. See “Installing and Configuring Help Locally.”
- *Oracle Smart View for Office User's Guide*, Appendix B. See “Installing and Configuring Help Locally or on a Web Server.”

## Information for 64-Bit Microsoft Office Installations

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

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

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

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

- 14770595 -- In previous releases, you could not install the 64-bit version of Smart View from the Oracle Business Intelligence Home page.

Starting with release 11.1.2.5, the Smart View executable file, `SmartView.exe`, can be used to install with both 32- and 64-bit versions of Office. Download the `SmartView.exe` from Oracle Technology Network or My Oracle Support for distribution to your users or refer to [“Installing from Oracle BI EE” on page 9](#) for other installation options.

## Supported Platforms

### Subtopics

- [Microsoft .NET Framework Support](#)
- [Oracle BI EE Support](#)
- [Browser Support](#)

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

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>

**Note:** Unless otherwise stated in this readme, platform support in Smart View 11.1.2.5.410 follows that which is stated in the 11.1.2.4 version of the *Oracle Enterprise Performance Management System Certification Matrix*.

## Microsoft .NET Framework Support

Smart View 11.1.2.5.410 requires Microsoft .NET Framework 4.0 or higher, with the following caveats:

- If you plan to run the Smart View installer directly from a browser interface, the minimum version required is .NET Framework 4.5 or higher.
- If you plan to download and run the installer locally, the minimum version required is .NET Framework 4.0.

## Oracle BI EE Support

- To use the Oracle BI EE-related features in Smart View, you must have Oracle BI EE release 11.1.1.7.1 or any patches to the 11.1.1.7.1 release.

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

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

- **During the design session**—For example, after you created the view in View Designer and clicked OK to insert the view, select the view within the Office document and click the View Designer icon to relaunch the View Designer for editing.
- **From a view in a saved Office document**—Select the view within the Office document and click the View Designer icon to relaunch the View Designer for editing.
- **From a published view in the Presentation Catalog**—Right-click the view in the catalog tree, and then select “Load view in View Designer”.

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

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

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

When working with Oracle BI EE data sources, running Smart View in a language other than the language of the machine's Windows operating system, system locale, or Office language, may result in incorrect data being returned. For example, if the Windows operating system, system locale, and Office language are English, and you run Smart View in Russian, chart data may display incorrectly.

## Browser Support

Although Smart View does not have a browser version dependency, it is possible that the products that Smart View works with do. Check the *Oracle Enterprise Performance Management System Certification Matrix* and specific product readmes for any additional browser support requirements.

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

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>

## Supported Languages

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

<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>

**Note:** Unless otherwise stated in this readme, language support in Smart View 11.1.2.5.410 follows that which is stated in the 11.1.2.4 version of the *Oracle Enterprise Performance Management System Certification Matrix*.

## Supported Paths to this Release

You can upgrade to Smart View Release 11.1.2.5.410 from the following releases:

**Table 2** Supported Paths to this Release

Release Upgrade Path From	To
11.1.2.x	11.1.2.5.410

**Note:** When upgrading from release 11.1.1.3.x and earlier, Oracle recommends uninstalling Smart View before installing release 11.1.2.5.410.

## Backward Compatibility

Smart View supports the EPM System product versions listed in the Release Compatibility tabs in the *Oracle Enterprise Performance Management System Certification Matrix*. This matrix is posted on the Oracle Fusion Middleware Supported System Configurations page on OTN:

## Defects Fixed in this Release

This section includes defects fixed in Release 11.1.2.5.410.

- 20440073 -- View Designer displays an error when the row count for a report containing a formula changes due to addition or deletion of a row in the Oracle BI EE server.
- 20446476 -- Unable to retrieve date measures in Smart View from Essbase data sources.
- 20539774 -- Unable to refresh reports from Oracle Hyperion Financial Reporting in query-ready mode when Page or POV members have more than 29 characters.
- 20563451 -- When using Smart View to import Oracle BI EE reports that contain a timestamp column, the timestamp column shows 12:00:00 AM for all the entries.
- 20821392 -- Excel 2013 terminates abnormally if the Excel window is closed while the Smart View Panel is minimized.

## Known Issues

### Subtopics

- [Installation](#)
- [General](#)
- [Disclosure Management](#)
- [Enterprise Performance Reporting](#)
- [Essbase](#)
- [Financial Management](#)
- [Financial Reporting](#)
- [Oracle BI EE](#)
- [Planning](#)
- [Reporting and Analysis](#)

The following are the noteworthy known issues of this release.

## Installation

- 14233719 -- If you are upgrading to this release *from* a Smart View PSE release, Oracle recommends that you first uninstall the PSE release and then install this release.
- 14648478 -- The Smart View installer does not fully support bidirectional (BiDi) languages. This can result in installer screens containing formatting errors such as misaligned text and icons. The installer can be used, however, and the installed Smart View product will display correctly in BiDi languages.



- 17206029 -- After installing Smart View and launching Excel for the first time, you may get an error message similar to the following: “Unable to set the installed property of the add-in class.”

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

#### COM Add-ins Method:

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

#### Trust Center Method

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

```
C:\Oracle
```
  6. Click **OK**.
  7. Click **OK** to close the **Trust Center**, and then click **OK** to close **Excel Options**.
- 17662148 -- On 64-bit operating systems, the Smart View silent install does not complete successfully for non-admin users.
  - 18038604 -- When using the **Check for updates** link on the **Extensions** page of the Smart View **Options** dialog box, all Microsoft Office applications must then be closed to install any applicable extension updates.
  - 19477442 -- On Windows 8, 64-bit with Office 64-bit, installing this release over the 11.1.2.2.310 release results in a “Could not find Oracle's Hyperion SmartView COM Addin” error.

## General

- 9315130 -- Microsoft security update KB969604 for Office 2007 breaks Smart View functionality in Word. See Microsoft documentation for information about fixing this problem.

- 9691355 -- When you delete a worksheet containing a reporting object from the Report Designer, Excel may terminate abruptly. This is a Microsoft issue.
- 11934177, 12569072, 18057207 -- Due to a Microsoft limitation, many of the Microsoft APIs that Smart View depends on for both Smart View and Excel functionality do not work when the Excel option, **Transition navigation keys**, is enabled. For example:
  - In Excel, copy/paste, macros, automation API calls do not work correctly.
  - In the Planning Admin extension, member formula formatting in the Smart View Dimension Editor does not display correctly; formulas have incorrect syntax when submitted to Planning.

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

- The Excel option, **Transition navigation keys**, must be cleared.
- The Smart View option, **Improve Metadata Storage**, must be enabled (by default, this option is enabled).
- 13987451 --For larger workbooks, a “not enough resources” error may occur.

**Workarounds:**

- Break up your workbook into smaller workbooks.
- Upgrading to Office 64-bit may resolve the issue.
- 14494179 -- Zooming out after performing a zoom in can leave blank rows on the worksheet.

**Workaround:** This is not a specific Smart View issue but may be related to excess formatting not being removed by Excel. Oracle recommends trying the following Microsoft workarounds:

- [Reset the last cell in Excel](#)
- Download and use the [Microsoft Excel Excess Formatting Cleaner Add-in](#)
- 14456134 -- Various issues may arise when the Excel option, **Ignore other applications that use Dynamic Data Exchange (DDE)**, is selected. For example, there are problems launching Excel, launching Excel files from outside of Excel, and using the **Export in Query Ready Mode** option against Firefox 17.x to export balances from Financial Reporting.

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

- 16554169 -- On computers where Smart View is installed, an error occurs when updating links in PowerPoint that were copied from Excel to PowerPoint.
- 16835531 -- Smart View does not support number formatting of Function Grids imported from Smart Slices.
- 17164523 -- The selected POV members are reverted to dimension members after deleting some columns and refreshing the spreadsheet.

**Workaround:** Click the POV button to hide the POV toolbar. Then ensure that you do not delete the column that contains the Page members.

- 17215221 -- On Microsoft Surface Pro tablets, in the Task List pane, the text does not display correctly in the Action Panel and in Task Details. Items in these areas are squeezed together vertically, causing the fonts to be cut off at the bottom of each item.
- 17263827, 17636796, 17667907, 20648759 -- Microsoft has enabled Office Animations for the Task Pane and many controls within Office 2013. This causes flickering and screen movements in the following situations:
  - Opening forms, especially when opening composite and cascading forms.
  - Opening multiple connections in new tabs, whether you are opening composite forms or simple forms.
  - Accessing the About box from the Help button in the Smart View ribbon when the Oracle Hyperion Disclosure Management extension is also installed (note that per issue 17667907, a sharing violation error message is first displayed)

**Workaround:** Information on troubleshooting flickering issues is available in the Oracle Knowledge Base article, “Smart View Flickering with Office 2013” (Doc ID 2004898.1). This white paper contains detailed instructions on creating and configuring the DisableAnimations key and the DisableWindowTransitionsOnAddinTaskPanes key. Both work to reduce flickering in Office 2013.

Refer to Microsoft Windows documentation if you require further help creating these registry keys.

- 17460364 -- When the Predictive Planning extension is enabled in , and the user opens a composite form which does not have business rules associated with it, but the base forms do have business associated with them, a "Cannot cannot to the provider" error occurs while trying to save the form.
- 18115776 -- When extensions are enabled in Smart View, cascading a report with a large number of members can cause Excel to stop responding.

**Workaround:** From the Smart View Options dialog box, Extensions page, disable any extensions that are installed. Restart Excel and repeat the cascade operation.

- 19468792 -- Web launch operations do not work from Internet Explorer 64-bit to Office 32-bit.

**Workaround:** Before performing the web launch operation, ensure that your Office application is already running.

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

**Workaround:** Add a POV control and use it instead of the POV Manager.

- 20375643 -- In some cases, data cells are not marked as dirty after they are modified.
- 20958232 -- In Planning and Financial Management forms, after copying a cell, only a single paste is allowed. Pasting into subsequent cells is not supported.

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

## Disclosure Management

- 14275486 -- When Oracle Hyperion Disclosure Management doclets are combined into master documents, table autofit formatting may be lost.
- 18347708 -- Disclosure Management 11.1.2.4.0.78 will always trigger the autodeployment process. To work around this issue, update the version number for Disclosure Management in the Smart View `UpdateList.xml` file:

From: version="11.1.2.4.078"

To: version="11.1.2.4.0.78"

For information on modifying the `UpdateList.xml` file, see the *Oracle Smart View for Office User's Guide*, "Administering Extension Installations and Updates" topics.

## Enterprise Performance Reporting

See *Enterprise Performance Reporting Cloud Service Known Issues* on the Oracle Help Center for the complete list of Oracle Enterprise Performance Reporting Cloud Service known issues, including those related to Smart View.

## Essbase

- 18076474 -- Formulas are not retained on the worksheet after performing an **Undo** and then a **Redo**.
- 11841013 -- You may not be able to change members in a Smart List.
- 12890030 -- If you change alias tables, members that you drag from the POV toolbar to the grid may be lost.
- 12913962 -- When you associate a connection to an ad hoc worksheet using **Set Active Connection**, members may disappear from the worksheet when you refresh.

**Workaround:** Instead of associating a connection, perform direct ad hoc analysis on the worksheet.

- 13854982 -- When filtering on attributes at the Generation 3 level in an attribute dimension, Smart View only displays members up to the Generation 2 level.
- 14470264 -- The `HsGetVariable` function does not support non-ASCII variable values.
- 16607593 -- When executing an MDX query with a calculated member (WITH MEMBER...) in Excel, the calculated values appear for a very short time in the sheet column and then are converted to a comment column. All calculated values are lost either automatically or by performing a Refresh.

This occurs whether you are using the **Execute MDX** command in the **Essbase** ribbon, or the VBA function, `HypMDXExecute`.

- 18370823 -- When **Formula Fill** is enabled, formulas are removed after a Refresh.

- 18428866 -- A user with access privileges to an Essbase database is unable to create a Smart Query when connected to that database.
- 18480728 -- In multiple-grid sheets, submitting data values '0 and &nd does not work properly when the **#No Data/Missing Label** is set to '0 or &nd.
- 19134780 -- Connection information for multiple-grid sheets cannot be updated using VBA.
- 19181853, 19335608 -- Excel memory use increases with each Refresh operation on function-only worksheets and certain ad hoc reports.
- 19190415 -- When the POV toolbar is displayed, an error is returned upon refresh.
- 19930163 -- In the following environment: Windows 8.1, 32-bit with Office 2013, 32-bit, while performing ad hoc operations, Excel may become unresponsive to right-clicks within the sheet; for example, when attempting to pivot using drag-and-drop.
- 19948854 -- When working with Essbase databases that support duplicate member names, MDX queries may generate “unknown member” errors in Smart View.
- 20170894 -- Smart View refresh on multiple-grid worksheets fails when the sheet name contains a single quote (').

## Financial Management

- 16451623 -- Chart data is not properly updated upon Refresh if the data for the current intersection is #Invalid.  
**Workaround:** Change the slider or POV to a valid data point that displays different data, and then perform a Refresh. The chart is properly updated.
- 16898574 -- Some style preferences set on forms from within Financial Management are not honored on forms in Smart View.
- 17632970 -- In Smart View 11.1.2.1.103, after submitting a cell that has pipe character(|) and caret(^), the submitting removes all pipe characters and adds “c” after any caret.  
**Workaround:** Do not create cell text with a caret or pipe character.
- 17591100 -- Member search does not work on forms that contain the Add Member button.
- 18252228 -- In Financial Management ad hoc grids, when connecting by performing a refresh, the **Smart Slice** and **Cascade** commands are grayed out in the **HFM Ad Hoc** ribbon.
- 18512314 -- When using **Find Next** in the **Member Selection** dialog box, the first member that matches the search criteria is located, but clicking **Find Next** again does not locate any other relevant members.
- 18605071 -- When opening a form for the first time in Smart View, the preferences set from Smart View are honored instead of the preferences set in the Financial Management web application.
- 18861859 -- In Financial Management forms, **Member Selection** dialog box, the selections available in the **View** and **Filters** options are not consistent with the selections available for the same form in the Financial Management web application.

- 19827684 -- When working Financial Management ad hoc, and copying and pasting cells from Excel to Word, formatting is not retained even though the **Use Excel Formatting** option is selected.

## Financial Reporting

- 14600458 -- When exporting a Financial Reporting report from EPM Workspace to Smart View, the user POV for the report is not retained. The user POV defaults to the user POV used most recently in Smart View.
- 14643318 -- An “Invalid Pointer” error results during login when the data source connection has timed out and you attempt to refresh a previously-saved report that contains a function grid.

**Workaround:** Close the workbook and Excel. Then, restart Excel, open the workbook, and perform the refresh.

- 19827684 -- Formatting is not retained when copying and pasting cells from Excel to Word.

## Oracle BI EE

- 14345387 -- Smart View does not support direct insert of stepped and curved line charts. When inserting a stepped or curved line chart, Smart View will substitute the closest match, a default line chart. This is expected behavior.
- 14355587 -- Selection lists specified for prompts in BI Answers (radio button lists and check box lists) are converted to list controls in Smart View. This is expected behavior.
- 14563557 -- Checking or clearing the “Use unified scale” option in BI Answers requires that you use the “Replace View” option when refreshing in Smart View. This is expected behavior.

For information on setting refresh preferences, see “Specifying Preferences for Refreshing Views” in the “Smart View and Oracle BI EE” chapter of the *Oracle Smart View for Office User's Guide*.

- 14580332 -- Time zone preferences set in Oracle BI EE account preferences are not exposed in Smart View.
- 14600296 -- In the Prompt Selector, there is a limit of 256 items that can be displayed in drop-down list controls or option lists.

**Workaround:** Increase the value of the setting in Prompts/MaxDropDownValues in `instance.config` in BI Answers.

- 14737958, 14750088 -- In View Designer, you cannot create a view with a column of numeric type on the Page or Section edges.
- 15840478 -- Pie charts are not refreshed after adding a filter in BI Answers if the filter added is on a dimension that defines the number of pies that display.

**Workaround:** If there is a change in a filter column that is also defined as a number-of-pies dimension, then you should change the refresh option on the chart view to **Replace View**,

and then perform another refresh. This ensures a correct refresh, updating the number of pies and the chart titles that correctly reflect the new data.

See “Specifying Preferences for Refreshing Views” in the *Oracle Smart View for Office User's Guide* for instructions.

- 15840538 -- Pie charts are not refreshed after removing a filter in BI Answers if the filter removed is on a dimension that defines the number of pies that display.

**Workaround:** See the workaround specified for bug 15840478.

- 15886617 -- The precision of digits that Smart View can display in Excel is limited to the precision of digits allowed by Excel.

For example, the following is an 18-digit number formatted with two decimal places:

```
123456789123456789.12
```

Because of Excel's 15-digit precision limitation, the digits after the 15th digit are changed to zeroes in Excel and the number would be displayed as follows:

```
123456789123456000.00
```

- 15969695 -- On Office 2007, a memory error occurs when inserting a chart into PowerPoint.

**Workaround:** Install Microsoft Office 2007 Service Pack 3.

- 16373849 -- When inserting multiple objects from a compound view into PowerPoint and selecting the “one object per slide” option, an Excel instance is opened for each object and then minimized in the Windows Taskbar. However, when the insert operation is complete, the Excel instances are not automatically closed. This can clutter the Taskbar when inserting a large number of objects.

**Workaround:** To minimize the number of Excel instances shown in the Taskbar, click the Office button (in the upper left corner of Excel), select **Excel Options**, and then select the **Advanced** tab. In **Display** options, clear the **Show all windows in the Taskbar** check box.

- 16055532 -- When pivot tables that contain embedded pivot charts are inserted into Smart View, the embedded pivot charts are not imported.

**Workarounds:** You can either use Excel to create a pivot chart based on an inserted Excel pivot table or use BI Answers to create a new chart view and insert that view using Smart View.

- To create a pivot chart based on the inserted native Excel pivot table, complete these steps:
  1. In Smart View, click in the Excel pivot table and select the Excel **Options** ribbon.
  2. From the **Tools** group, click the **PivotChart** button.
  3. In **Insert Chart**, select a chart style and then click **OK**.
- To create and insert a separate chart view:
  1. In Oracle Business Intelligence Answers, create a new, separate chart view object.
  2. In the Office application, use Smart View to insert the newly-created chart view.

In both workarounds, the pivot chart is rendered.

- 16285804 -- If a prompt is defined on double columns, and the prompt operator selected is **\* Prompt User**, the following operators do not work at runtime:
  - is less than
  - is less than or equal to
  - is greater than
  - is greater than or equal to
  - is like
  - is not like

**Workaround:** Do not use the **\* Prompt User** operator. Instead, define the operator explicitly at design time, using one of the operators listed above. The operators will then work.

- 16520355 -- In Word and PowerPoint, there can be some overlapping of tables and charts when inserting a compound view or when a compound view is either inserted from the catalog or copied and pasted. This is especially true when any of the objects in the compound view are particularly large.

## Planning

- 6533549, 6549255 -- If a member cell contains a formula that calculates the value for a summary time period, that cell should be locked, but instead, Smart View may mark it as dirty if the data for the member is modified.
- 14805911, 17250666 -- Performance may be very slow when launching the **User Preferences** dialog box from a Planning application in the Smart View Panel, and selecting members for user variables in Smart View.
- 14834659 -- When substitution variables are used, the last column (the right-most column) on Oracle Hyperion Web Analysis forms is dropped or hidden when the form is opened in Smart View.
- 16721734 -- In specifying a **Replacement** option as #NumericZero (**Options** dialog box, **Data Options** tab), and then spreading data for Time Periods, the parent data could not be deleted.

**Workaround:** Ensure that the **Replacement** option, **Submit zero**, is selected when #NumericZero is also selected.

- 16898574 -- Some style preferences set on forms from within Planning are not honored on forms in Smart View.
- 17926504 -- Ad hoc analysis started from a saved Planning grid will inherit the formatting options saved as part of the grid.

To use Smart View Cell Styles or the Use Excel Formatting option for an ad hoc grid generated from a saved grid, complete the following steps:

1. Open the saved Planning grid as a form.
2. In the Planning ribbon, **Formatting** group, select **Apply**, and then **None**.
3. Click **Save** to save the form back to the Planning server.



4. Now use the saved form to perform ad hoc analysis.

- 17975749 -- Saving formatting is not recommended on forms of 20,000 or more cells.
- 18421689 -- In Smart View, the display order of business rules attached to a form differs from the display order in Planning.
- 19685022 -- Number formatting is not retained when copying data points from Excel to Word or PowerPoint.
- 19843672 -- In Planning forms, when working with user variables, selecting a substitution variable as a value of a user variable is not supported.
- 20074859 -- The **Member Name Display** option is not displaying aliases correctly in Planning ad hoc and forms.
- 20354913 -- In Planning forms, changes to the page dimension do not carry over to the ad hoc grid after clicking **Analyze**.
- 20417037, 20564104, 20696893 -- In Office 2013, flickering and screen movements occur in the following situations:
  - Refreshing a composite web form using the **Refresh All** command causes the POV toolbar to flicker and shift up and down.
  - Opening a web form that has a page drop-down.
  - Moving between simple forms on multiple sheets or between composite forms.

**Workaround:** Information on troubleshooting flickering issues is available in the Oracle Knowledge Base article, “Smart View Flickering with Office 2013” (Doc ID 2004898.1). This white paper contains detailed instructions on creating and configuring the DisableAnimations key and the DisableWindowTransitionsOnAddinTaskPanels key. Both work to reduce flickering in Office 2013.

Refer to Microsoft Windows documentation if you require further help creating these registry keys.

- 20794274 -- Locking the Year Total cell and copying the distributed period values on months with alternative hierarchy results in an incorrect distribution.
- 20938289 -- When two forms are on two separate worksheets, the rule variable on one form changed to the default after refreshing the page dimension on the other form, causing the business rule to invoke an incorrect value for a runtime prompt variable.

## Reporting and Analysis

- 6575786 -- **Refresh** and **Refresh All** do not work if two pages of a Oracle Hyperion Web Analysis report are imported sequentially.

**Workaround:** Use All Pages to import multiple pages of a report.

- 6908330 -- Oracle Hyperion Reporting and Analysis documents are not displayed in Import Workspace Document Folder Tree if EPM Workspace is under WebSeal and configured for a context path (`http://<server>:<port>/<context path>/workspace`) other than the default (`http://<server>:<port>/workspace`).

- 7674839 -- When you import a Financial Reporting report into Smart View and refresh, the worksheet becomes solid black, except for the cells imported from Financial Reporting.

**Workaround:** From the Excel Tools menu, select Options. On the Color tab, click Reset and then OK.

- 9160243 -- These issues exist with dashboards imported as images from Smart View into Excel, Word, and PowerPoint:
  - The image sizes differ from the images in Oracle Hyperion Enterprise Performance Management Workspace.
  - There is an excess of background space around the images.

**Workaround:** In some cases, you may be able to resize the graphic to make it more usable. However, because of Microsoft Office limitations, any excess background space will always be present.

- 13875551 -- When you export an Oracle Hyperion Interactive Reporting report from Internet Explorer into Smart View, the Smart View ribbon disappears in Excel.

**Workaround:** Open Excel before exporting from Internet Explorer.

## Tips and Troubleshooting

### ● Smart View Diagnostics Tools

When working with Smart View, if issues arise that you cannot resolve on your own, you can use the new Smart View diagnostic tools in the **Diagnostics** group in the Smart View ribbon to create and collect log files and screenshots to send to Oracle Support. When you are finished collecting diagnostic data, you use the diagnostic tools to zip up the files. Then you transmit the ZIP file to Oracle Support for analysis. The log files and screenshots are used by Oracle Support to troubleshoot and resolve your issue.

To enable the diagnostics tools, go to the **Options** dialog box, **Advanced** tab, and select **Show Diagnostics Group on Smart View Ribbon**.

See the “Smart View Diagnostics” chapter of the *Oracle Smart View for Office User's Guide* for more information on using the diagnostics tools.

- 16073739 -- 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 Smart View integration with Oracle Access Manager to work.
- 19469450 -- 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.
- 19905121 -- When running a Oracle Hyperion Financial Reporting report from Smart View, a web control is called that causes this error to display: “The product does not support compatibility view. Contact your system administrator to help configure your settings.” By default, the web control runs in compatibility mode, triggering the compatibility message.

## 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
```

# Documentation Updates

## Subtopics

- [Accessing EPM System Product Documentation](#)
- [Online Help in Internet Explorer](#)
- [Copying and Pasting Code Snippets from PDFs](#)
- [Improvements to Smart View Options Topics](#)
- [Updates to HypCreateConnection and HypCreateConnectionEx VBA Functions](#)
- [Drill State Display of Oracle BI EE Columns in Smart View](#)
- [Online Help Search in Internet Explorer](#)
- [Browser Settings When Working with XML Files on HTTP Server](#)
- [Limited Chart Copy and Paste Support](#)
- [Using VBA Functions with Form-based Authentication](#)
- [Using the "Suppress Repeating Members" Option with 11.1.2.2.102 and Earlier Workbooks](#)
- [Documentation Correction](#)
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## Accessing EPM System Product Documentation

Find the latest EPM System product guides in the Oracle Help Center (<https://docs.oracle.com/en/>). To access documents to view or download, click the Applications icon. In the Applications Documentation window, select the EPM tab, and then click the Enterprise Performance Management link.

You can also find deployment-related documentation on the Oracle Technology Network (<http://www.oracle.com/technetwork/index.html>) and on the Oracle Software Delivery Cloud website ([http://edelivery.oracle.com/EPD/WelcomePage/get\\_form](http://edelivery.oracle.com/EPD/WelcomePage/get_form)). Or you can visit the EPM System Documentation Portal (<http://www.oracle.com/us/solutions/ent-performance-bi/technical-information-147174.html>). There, you'll find links to My Oracle Support, EPM Supported Platform Matrices, and more.

## Online Help in Internet Explorer

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

## Copying and Pasting Code Snippets from PDFs

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

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

## Improvements to Smart View Options Topics

18132814 -- In the *Oracle Smart View for Office User's Guide*, the Smart View Options topics are improved to include tables that describe option support by provider. The Options topics that include this additional information are: "Member Options," "Data Options," "Formatting Options," and "Cell Styles."

## Updates to HypCreateConnection and HypCreateConnectionEx VBA Functions

19521610 -- HypCreateConnection supports Planning connections. In the HypCreateConnection topic in the *Oracle Smart View for Office Developer's Guide*, the list of supported data provider types should include Planning.

HypCreateConnectionEx is a deprecated function. Instead, use HypCreateConnection to create connections for Essbase, Financial Management, and Oracle Hyperion Planning data providers.

## Drill State Display of Oracle BI EE Columns in Smart View

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

## Online Help Search in Internet Explorer

19317836 -- In the Smart View HTML-based documentation, the Search functionality may not work correctly in Microsoft Internet Explorer. This includes help accessed from the Smart View product, and the Smart View product documentation in HTML format on the Oracle Technology Network.

To resolve this issue, ensure that you are using Internet Explorer's Compatibility View mode when viewing the Smart View HTML-based documentation. See the Internet Explorer help for instructions on using Compatibility View.

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

16231447, 19839671 -- Internet Explorer may cache XML files posted on an HTTP server and referenced by Smart View. This can cause problems when using the following Smart View functionality:

- Accessing shared connections from an XML file (16231447).

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. This file can also specify the location of the online help.

- Updating extensions (19839671)

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.**

## Limited Chart Copy and Paste Support

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

## Using VBA Functions with Form-based Authentication

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

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

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

## Using the “Suppress Repeating Members” Option with 11.1.2.2.102 and Earlier Workbooks

17001455 -- In the “Displaying and Suppressing Repeated Members” topic in the *Oracle Smart View for Office User's Guide*, the following information was not included. You must perform the steps below before you begin using your workbooks with Smart View 11.1.2.5.200 and later.

If you are working with spreadsheets that were created and used with version 11.1.2.2.102 or earlier of Smart View, Oracle Essbase, and Oracle Hyperion Provider Services, you must complete the following steps in order to assure that row and column data aligns properly with their parent members:

1. Make a backup copy of your workbook.
2. In the **Data** tab of the **Options** dialog box, clear the **Repeated Members** option.
3. Refresh the workbook. You may refresh the entire workbook or refresh each sheet individually.
4. Go back to the **Data** tab of the **Options** dialog box, and select the **Repeated Members** option.
5. Perform the refresh operation again.

The workbook is ready for use with Smart View version 11.1.2.5.200 and later.

## Documentation Correction

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

## Installation and Languages

20380466 -- The Smart View 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 Oracle Smart View for Office **Options** dialog box, **Advanced** tab.

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