



ORACLE® SMART VIEW FOR OFFICE

Release 11.1.2.5.510

Readme

ORACLE®

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Purpose

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

New Features in This Release

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

For new features relating to Oracle Enterprise Performance Management System 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>

Installation Information

Installation topics are covered in the *Oracle Smart View Installation and Configuration Guide*. This guide is available in the Smart View 11.1.2.5.510 library on the Oracle Help Center.

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

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

Information for 64-Bit Microsoft Office Installations

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

- Although Oracle Hyperion 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.

Supported Platforms

Subtopics

- [Microsoft Windows Operating System Support](#)
- [Microsoft .NET Framework Support](#)
- [Financial Management Journals Extension 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 11.1.2.5.510 follows that which is stated in the 11.1.2.x version of the *Oracle Enterprise Performance Management System Certification Matrix*.

Microsoft Windows Operating System Support

Smart View 11.1.2.5.510 is supported on Windows 10.

Microsoft .NET Framework Support

Smart View 11.1.2.5.510 requires Microsoft .NET Framework 4.5 or higher.

Financial Management Journals Extension Support

The Oracle Journals for Financial Management extension works with Smart View version 11.1.2.5.500 and later, and with Oracle Hyperion Financial Management 11.1.2.4.100 and later.

Oracle BI EE Support

- To use the Oracle Business Intelligence Enterprise Edition-related features in Smart View, you must have Oracle BI EE release 11.1.1.7.1 or any patches to the 11.1.1.7.1 release.
- Starting with Smart View 11.1.2.5.510, the Oracle BI EE per-user extension installer is included with the Smart View client installation.

The extension is installed the first time the user starts Office if the Oracle BI EE extension is not already installed and it is not disabled.

- 21888550 -- If you have installed Smart View 11.1.2.5.510, and started Office at least once, the Oracle BI EE extension is installed automatically. If you must uninstall the 11.1.2.5.510 release and reinstall an earlier version of Smart View, perform these steps:
 1. In the Smart View ribbon, go the **Options** dialog box, **Extensions** tab, and click the **Check for Updates, New Installs, and Uninstalls** link.
 2. Locate the Oracle BI EE extension in the list, and clear the **Enabled** check box.
 3. Click **Remove**.

If there is no **Remove** button for the Oracle BI EE extension, click the **Check for Updates, New Installs, and Uninstalls** link again.

The **Remove** button should appear for the Oracle BI EE extension.

4. Close and restart Office to verify that the Oracle BI EE extension is removed from the list in the **Extensions** tab.
 5. Uninstall Smart View from the Windows Control Panel.
- 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 must 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 11.1.2.5.510 follows that which is stated in the 11.1.2.x version of the *Oracle Enterprise Performance Management System Certification Matrix*.

Supported Paths to this Release

You can upgrade to Smart View Release 11.1.2.5.510 from the following releases:

Table 1 Supported Paths to this Release

Release Upgrade Path From	To
11.1.2.x	11.1.2.5.510

Note: When upgrading from release 11.1.1.3.x and earlier, Oracle recommends uninstalling Smart View before installing release 11.1.2.5.510.

Backward Compatibility

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

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

Defects Fixed in This Release

This section includes defects fixed in Release 11.1.2.5.510. To review the list of defects fixed between earlier releases, use the Defects Fixed Finder This tool enables you to identify the products you own and your current implementation release. With a single click, the tool quickly produces a customized report of fixed-defect descriptions with their associated platforms and patch numbers. This tool is available here:

<https://support.oracle.com/oip/faces/secure/km/DocumentDisplay.jspx?id=1292603.1>

- 21472462 -- **Essbase**. Unable to update the Dynamic Time Series POV member in PowerPoint for data points copied from Excel.
- 21416511 -- **Oracle BI EE**. The **Refresh All** operation does not refresh all slides when Smart View 11.1.1.5.410 is connected to the Oracle BI EE provider. Only the active slide gets refreshed.
- 21220218 -- **Planning**. Business Rules launched in Smart View do not honor the limits applied. Instead all the descendents are shown.
- 21567487 -- **Planning**. Indentation of dimensions in a Planning form is displayed incorrectly.
- 21622488 -- **Planning**. Submitting data from a large Planning form is unusually slow.
- 21622609 -- **Planning**. Slow response time when marking dirty cells in a large Planning form.
- 21646034 -- **Planning**. Smart View is not able to submit text data if the data has been copied and pasted from other Excel cells.
- 21759728 -- **Planning**. Entering comments on multiple cells while connected to the Planning provider in ad hoc analysis mode causes an error when there is no dimension in the POV, and **Apply to all selected cells** is checked.

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, 21156027 -- 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:

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**.

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**.
- 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.

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 Oracle Hyperion Financial Reporting.

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

- 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 Smart View for Office Installation and Configuration Guide*. See “Flickering Issues on Office 2013 32-bit and 64-bit.” This topic contains detailed instructions on creating and configuring the DisableAnimations key and the DisableWindowTransitionsOnAddinTaskPanes key. Both work to reduce flickering in Office 2013.

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

- 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.

- 20364435 -- After pasting dynamic data points in Word, 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**.
- 20866653 -- Launching Smart View from a web browser does not work unless Excel is already open.
- 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.

- 21355132, 21691927 -- Copying a Smart List or Text List cell and pasting it over three or more cells causes Excel stop responding.
- 21607945 -- An invalid row height or column width error can occur when performing a Refresh All on certain workbooks.
- 21803394 -- Microsoft Word suspends or terminates unexpectedly after inserting several reporting objects in succession.
- 21820253 -- In some cases, in workbooks with multiple sheets where each sheet contains a different query or template, if you drag the POV toolbar to the top of a sheet and dock it, you may see two POV toolbars on that sheet. This can occur on any number of sheets where the POV toolbar has been docked.

Workaround: Click the X in the right corner of one of the POV toolbars to close it, or refresh the sheet.

- 21866540 -- To use the new Import Metadata in PowerPoint feature, you must select a single slide to begin the import process. An error message is displayed if you attempt to invoke the import metadata functionality when either no slide is selected or multiple slides are selected.
- 21917209 -- The HypGetSheetOption and HypSetSheetOption functions are not working for Member Name Display options.

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 the *Oracle Enterprise Performance Reporting Cloud Readme* in your service environment for 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`.

- 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.
- 21355132 -- Smart View terminates unexpectedly when copying one cell containing text and pasting to multiple cells.

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.
- 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.
- 20726025 -- In Windows 8x versions, if the **Member Name Display** option is set to “Member Name and Description,” you may get an “Invalid members” error when trying to save a journal. This can be the result of the size of the Excel window onscreen.

Workaround: Try unfreezing panes in Excel using the **View**, then **Freeze Panes**, and then **Unfreeze Panes** command. Also, you may reduce the display size to 75% or 50% before opening or creating the journal.

- 21158205, 21438712 -- In the **Entity Details**, the **View, Rows** functionality is not available from Smart View. This functionality is accessed from the drop-down menu when you click **View**, then **Rows** in the **Entity Details** dialog box (as described in “Selecting Rows for the Report” in the *Oracle Smart View for Office User's Guide*).

You can use select and view rows from the Financial Management web interface. This functionality will be fully supported in a later version of Financial Management.

- 20987930 -- Ampersands (&) are reserved characters and, when used in journal names, do not display properly in the list of journals in the **Manage Journals** dialog box in Smart View. For example, if a single ampersand is used in a journal name, then no ampersand is displayed in the name in **Manage Journals**; if two consecutive ampersands are used, then a single ampersand is displayed in the name in **Manage Journals**.

Once the journal is opened in Smart View, the name displays correctly. The name also displays correctly in the Financial Management web interface.

- 21847984 -- In Oracle Journals, when the Region and Language settings are set to a European language such as Swedish, values are truncated and do not display correctly. When set to English, the values are truncated but can be expanded to display correctly. Values display correctly when the Region and Language settings are set to an Asian language, such as Japanese.

Financial Reporting

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

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

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

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.
- 19717930 -- Clicking **OK** in the View Designer after the session is timed out returns an object reference error.
- 21795612 -- In environments where the Oracle BI EE server locale and the Smart View client locale are different, the names of Oracle BI EE artifacts in Smart View—such as views, titles, tables, and graphics—display in the language of the Oracle BI EE server locale instead of the Smart View client locale.
- 21825076 -- After copying slides between PowerPoint presentations and then importing metadata, no metadata is imported and, after a refresh, a Smart View error occurs.

Planning

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

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

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

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

1. Open the saved Planning grid as a form.
 2. In the Planning ribbon, **Formatting** group, select **Apply**, and then **None**.
 3. Click **Save** to save the form back to the Planning server.
 4. Now use the saved form to perform ad hoc analysis.
- 18421689 -- In Smart View, the display order of business rules attached to a form differs from the display order in Planning.
 - 19439940 -- When using the FVSCHEDULE function in Smart Forms, use cell references to existing data, rather than arrays of data.

For example, use:

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

Do not use:

```
=FVSCHEDULE(C10, {0.09, 0.11, 0.1})
```

- 19685022 -- Number formatting is not retained when copying data points from Excel to Word or PowerPoint.
- 19843672 -- In Planning forms, when working with user variables, selecting a substitution variable as a value of a user variable is not supported.
- 20794274 -- Locking the Year Total cell and copying the distributed period values on months with alternative hierarchy results in an incorrect distribution.
- 20938289 -- When two forms are on two separate worksheets, the rule variable on one form changed to the default after refreshing the page dimension on the other form, causing the business rule to invoke an incorrect value for a runtime prompt variable.
- 21345664 -- In Smart View, the currency symbol in a cell is displayed differently from the Planning web interface when the Planning option, “Allow multiple currencies per entity,” is set to true.
- 21567487 -- In the Oracle Hyperion Planning web interface, if the “Indent level 0 members only” option is set in Preferences, the page dimensions do not display with the correct indentation in Smart View.

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

This topic lists the most recent tips and troubleshooting topics. More tips and troubleshooting topics are listed in the *Oracle Smart View Installation and Configuration Guide*. This guide is available in the Smart View 11.1.2.5.510 library on the Oracle Help Center:

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

- **Smart View Diagnostics Tools**

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

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

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

- 19905121 -- When running a Oracle Hyperion Financial Reporting report from Smart View, a web control is called that causes this error to display: “The product does not support

compatibility view. Contact your system administrator to help configure your settings.” By default, the web control runs in compatibility mode, triggering the compatibility message.

For workarounds, see “Internet Explorer Compatibility View Settings for Financial Reporting” in the *Oracle Smart View for Office Installation and Configuration Guide*

- 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.

To reduce flickering issues, refer to the topic, “Flickering Issues on Office 2013 32-bit and 64-bit.” in the *Oracle Smart View for Office Installation and Configuration Guide*, “Tips and Troubleshooting.”

- 21038932 -- Smart View performance is slow in Excel 2013 when compared to earlier versions of Excel. Microsoft is working on a fix to Excel 2013. Until the fix is available from Microsoft, you can perform the actions noted in “Flickering Issues on Office 2013 32-bit and 64-bit” in the *Oracle Smart View for Office Installation and Configuration Guide*.
- 21158660, 21298436, 21316619, 21781491, 21814502 -- In some cases, third-party software that automates Excel processes, such as exporting to Excel, may cause issues with Excel and a conflict with Smart View. To disable Smart View when Excel is started in automation mode, you may enable “DisableInAutomation” by adding a key and key value to the Windows Registry. Refer to the *Oracle Smart View for Office Installation and Configuration Guide*, “Tips and Troubleshooting” chapter, “Issues When Starting Excel in Automation Mode” topic.

Documentation Updates

Subtopics

- [Accessing EPM System Product Documentation](#)
- [Copying and Pasting Code Snippets from PDFs](#)
- [Online Help in Internet Explorer](#)
- [Online Help Search in Internet Explorer](#)
- [Drill State Display of Oracle BI EE Columns in Smart View](#)
- [Limited Chart Copy and Paste Support](#)
- [Using VBA Functions with Form-based Authentication](#)
- [Tip for Using the Import Metadata to PowerPoint Feature](#)
- [Documentation Correction](#)
- [Local Help Patch on My Oracle Support](#)

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). Or you can visit the EPM System Documentation Portal (<http://www.oracle.com/us/solutions/ent-performance-bi/technical-information-147174.html>). There, you'll find links to My Oracle Support, EPM Supported Platform Matrices, and more.

Copying and Pasting Code Snippets from PDFs

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

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

Online Help in Internet Explorer

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

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 Help Center.

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.

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 Oracle Smart View for Office. 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.

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)
```

Tip for Using the Import Metadata to PowerPoint Feature

21866540 -- To use the new Import Metadata in PowerPoint feature, you must select a single slide to begin the import process. An error message is displayed if you attempt to invoke the import metadata functionality when either no slide is selected or multiple slides are selected.

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”.

Local Help Patch on My Oracle Support

21919807 -- The local help patch for this release (available on My Oracle Support) contains updated help in English only. The localized languages remain as version 11.1.2.5.500. The patch is expected to be refreshed with localized languages during the next release cycle.

Documentation Feedback

Send feedback on product documentation to the following email address:

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- LinkedIn - http://www.linkedin.com/groups?home=&gid=3127051&trk=anet_ug_hm

Accessibility Considerations

Our goal is to make Oracle products, services, and supporting documentation accessible to the disabled community. EPM System products support accessibility features, which are described in the product's *Accessibility Guide*. Find the most up-to-date version of this guide in the Oracle Enterprise Performance Management System Documentation Library on the Oracle Technology Network (<http://www.oracle.com/technology/documentation/epm.html>).

In addition, this Readme file is accessible in HTML format.

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Smart View Readme, 11.1.2.5.510

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