



ORACLE® SMART VIEW FOR OFFICE

Release 11.1.2.5.520

New Features



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Features Introduced in this Release

Behavior Change for Duplicate Member Databases

In some Oracle Smart View for Office reports based on duplicate member name databases, the distinct member name may not be easily readable. For example, the distinct member name may consist of a very long string of characters. To improve the readability of the report when working with duplicate member databases, the Smart View **Member Name Display** option now automatically defaults to **Member Name Only**. In previous releases, the default for duplicate member databases was **Distinct Member Name**. Note that you can always change the display to **Distinct Member Name**.

Features Introduced in Release 11.1.2.5.510

Subtopics

- [Easy Access to Attribute Members in Essbase](#)
- [Ability to Import Metadata in PowerPoint](#)
- [Individual Report Refresh Capability](#)
- [New Features in Oracle Enterprise Performance Reporting Cloud Service](#)

Easy Access to Attribute Members in Essbase

You can now quickly add attribute dimensions to an ad hoc sheet using the new **Insert Attributes** button available in the Smart View ribbon.

Click **Insert Attributes** to add to the page row or POV toolbar all the attribute dimensions in your Oracle Essbase database. When the attribute dimensions are in the page row or POV, you can pivot or drag them to the grid as required. You can use the **Remove Only** command to remove any unwanted attribute dimension or members. You can add attribute dimensions at any time during the ad hoc session.

If the grid already contains some, but not all, attribute dimensions in the database, you can click **Insert Attributes** to add the remaining attributes to the page row or POV.

Note that you can still use **Member Selection** to add specific attribute dimensions as required.

In the *Oracle Smart View for Office User's Guide*, see “Inserting Essbase Attribute Dimensions on the Sheet.”

Ability to Import Metadata in PowerPoint

In one presentation, you may want to make use of an existing PowerPoint slide in another presentation that contains not only the formatting and layout that you need, but data points as

well. Instead of recreating the slide from scratch, you can reuse the work that is already available with the new **Import Metadata** command on the Smart View ribbon.

Using the PowerPoint copy and paste commands to copy a slide or presentation in Smart View, only the data is copied; the metadata is not copied. After the copy and paste, use the **Import Metadata** command on the Smart View ribbon, to import the metadata from the original slide or presentation into the new slide or presentation. You can copy individual slides or entire presentations.

In the *Oracle Smart View for Office User's Guide*, see “Importing Metadata into Copied Slides or Presentations.”

Individual Report Refresh Capability

You can now refresh data in individual reports in Office by using the new **Refresh** link in the **Document Contents** pane.

In Smart View, reports consist of report queries and their associated reporting objects. These are listed in the **Document Contents** pane. From **Document Contents**, you can individually refresh report queries and their associated reporting objects, such as:

- Function grids
- Tables
- Charts
- Dynamic data points

In the *Oracle Smart View for Office User's Guide*, see “Refreshing Individual Reports from Document Contents.”

New Features in Oracle Enterprise Performance Reporting Cloud Service

Subtopics

- [New Home Panel in Enterprise Performance Reporting](#)
- [Support for PowerPoint Report Packages](#)
- [Report Packages Now Include Supplemental Doclets](#)
- [Commenting Support for Graphics in Enterprise Performance Reporting](#)
- [Individual Report Refresh](#)
- [Importing Metadata in PowerPoint](#)

New Home Panel in Enterprise Performance Reporting

The release introduces the new panel, Performance Reporting Home. In Smart View, when you first sign in to Oracle Enterprise Performance Reporting Cloud Service, you will now see

Performance Reporting Home. From this panel, you can quickly access your pending tasks and other work in which you are involved. From Performance Reporting Home, you can access:

- **Incomplete Tasks**—Incomplete tasks assigned to you.
- **Active Report Packages**—These are the active report packages for which you have outstanding tasks and responsibilities.
- **Recent Items**—Items you have recently accessed.
- **Library**—The library of items in Oracle Enterprise Performance Reporting Cloud Service, including report packages and reporting applications.

In the *Oracle Smart View for Office User's Guide* or *Working with Smart View for Oracle Enterprise Performance Management Cloud Services*, see “Using Performance Reporting Home.”

Support for PowerPoint Report Packages

Oracle Enterprise Performance Reporting Cloud Service now supports Microsoft PowerPoint-based report packages. You can create and work with report packages that can be output as PowerPoint presentations. All phases of the development process are supported for PowerPoint-based report packages.

Report Packages Now Include Supplemental Doclets

Supplemental doclets are documents which assist in the development of the overall report, such as source and reference files. Supplemental doclets are included in report packages and support the content management and workflow features of the author phase. Supplemental doclets can be of Office file types, such as Excel, Word, or PowerPoint; or of non-Office file types, such as PDF, TXT, or ZIP. Content from supplemental doclets is not merged into the combined report.

Supplemental doclets of any file type can be included in Word-based and PowerPoint-based report packages. For example, Word-based supplemental doclets can be included in Word- or PowerPoint-based report packages.

Note that supplemental doclets of any file type are *not* available or supported in the review or sign off phase, and they are *not* part of the final published report.

Commenting Support for Graphics in Enterprise Performance Reporting

In this release, you can now comment on graphics in the same way you comment on text. In Smart View, click the Add Comment button to add a pin to the slide or page, then enter your comment. The behavior differs slightly between Word and PowerPoint.

In the *Oracle Smart View for Office User's Guide* or *Working with Smart View for Oracle Enterprise Performance Management Cloud Services*, see “Posting a Comment.”

Individual Report Refresh

You can now refresh individual reports within a doclet in Word or PowerPoint, as described in [“Individual Report Refresh Capability” on page 3](#).

Importing Metadata in PowerPoint

In PowerPoint-based report packages, you can now import metadata from slides and presentations to slides and presentations, as described in [“Ability to Import Metadata in PowerPoint” on page 2](#).

Features Introduced in Release 11.1.2.5.500

Subtopics

- [New Smart Forms for Saving Client-side Calculations](#)
- [New Oracle Journals Extension for Financial Management](#)

New Smart Forms for Saving Client-side Calculations

The Excel formulas and functions that you add to ad hoc grids in Smart View can now be saved to Oracle Planning and Budgeting Cloud Service in Smart Forms.

Note: Smart Form functionality is available for ad hoc grids created with Oracle Planning and Budgeting Cloud Service. Check with your service administrator about the availability of Smart Forms in your service.

In Smart View, an Oracle Planning and Budgeting Cloud Service user can create an ad hoc grid, add Excel formulas or functions to the grid, and then save the grid, including the formulas and functions, to Oracle Planning and Budgeting Cloud Service as a Smart Form.

The formulas and functions, or *business calculations*, can be executed at runtime in either Smart View or the Oracle Planning and Budgeting Cloud Service client, without adding members to Oracle Planning and Budgeting Cloud Service metadata. When the Smart Form is opened from Smart View, the business calculations are executed completely in the Smart View client, leveraging the native Excel calculation engine, without a round trip to Oracle Planning and Budgeting Cloud Service. Business calculations are supported in both Smart View and the Oracle Planning and Budgeting Cloud Service web interface.

The Smart Form, with its calculations and grid labels, must be created in Smart View. Grid labels provide placeholders in a grid for entering the business calculations for corresponding data cell intersections. Smart Forms support formulas and functions for rows and columns at the cell level.

For more information, see the “Smart Forms” chapter in the *Oracle Smart View for Office User's Guide*.

New Oracle Journals Extension for Financial Management

Oracle Journals is a new Smart View extension that supports a subset of the Journals functionality found in the Oracle Hyperion Financial Management web interface.

Note: The Oracle Journals 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.

With the Oracle Journals for Financial Management extension in Oracle Smart View for Office, you can perform these journal tasks:

- Open a journal and view its properties, such as Status, Type, Balance Type, Group, and Class
- Create a new blank journal or create a journal using a standard or recurring template
- Create a journal from data grids or data forms opened in Excel using the right-click option in the grid or form, or the **Create Journal** command in the ribbon
- Create an ad hoc query from within a journal.
- Edit and save journals
- Submit, Unsubmit, Approve, Reject, Post, Unpost, and Delete journals
- Open an Entity Detail Report from data grids or data forms, and from an Entity Detail report, click on a journal to drill down for further details

For more information, see the “Oracle Journals” chapter in the *Oracle Smart View for Office User's Guide*.

New Features Introduced in Earlier Releases

Use the Cumulative Feature Overview tool to create reports of new features added in prior 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>

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