

Oracle® Smart View for Office

Accessibility Guide



Release 24.200
F93328-03
December 2024



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

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

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

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

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

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

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

Contents

Documentation Accessibility

Documentation Feedback

1 Welcome to Smart View Accessibility

2 Enabling Accessibility for Smart View

Working with JAWS	2-1
Enabling JAWS to Read ListView Headers	2-1
Using Microsoft Office Themes (Including Dark Theme)	2-2

3 Access Keys in Smart View

Ribbons	3-1
Panels	3-3
Smart View Panel	3-3
Query Designer Panel	3-4
Smart Query Panel	3-4
Narrative Reporting Panels	3-5
Right-Click Context Menu	3-5

4 Installing and Configuring Help Locally

Documentation Accessibility

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

Access to Oracle Support

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

Documentation Feedback

To provide feedback on this documentation, click the feedback button at the bottom of the page in any Oracle Help Center topic. You can also send email to epmdoc_ww@oracle.com.

1

Welcome to Smart View Accessibility

Defines the accessibility features of Oracle Smart View for Office.

This guide describes the accessibility features of Smart View. For more information regarding assistive technologies in Oracle Enterprise Performance Management, refer to these guides:

- *Oracle Enterprise Performance Management Cloud Accessibility Guide*
- *Oracle Enterprise Performance Management System Accessibility Guide*

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/us/corporate/accessibility/support/index.html#info> or visit <https://www.oracle.com/corporate/accessibility/learning-support.html#accessibility-support-tab> if you are hearing impaired.

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

2

Enabling Accessibility for Smart View

You do not need to enable accessibility specifically for Oracle Smart View for Office; it is always in accessible mode.

Smart View output is in the form of Excel spreadsheets, Word documents, and PowerPoint slides, which are accessible through Microsoft Office. For information about Excel, Word, or PowerPoint accessibility, refer to Microsoft Office product documentation.

Review the following topics to familiarize yourself with working with JAWS® and Microsoft Office themes in Smart View.

- [Working with JAWS](#)
- [Enabling JAWS to Read ListView Headers](#)
- [Using Microsoft Office Themes \(Including Dark Theme\)](#)

Working with JAWS

If you are using JAWS® Screen Reading Software:

- You must enable JAWS to read ListView headers, as described in [Enabling JAWS to Read ListView Headers](#).
- In Excel, when a dialog is launched directly from a button on an add-in ribbon (such as the Smart View ribbon or the Planning Ad Hoc ribbon), JAWS reads the location and content of the selected cell before reading the dialog content. An example of this is when launching the **Options** dialog box from the Smart View ribbon. The selected cell's location and content is read before the **Options** dialog content. When a dialog is launched using a drop-down menu on a ribbon button, the dialog content is read directly (and not the selected cell's location or content). An example of this is the **Build Function** command in **Functions** drop-down menu on the Smart View ribbon. After selecting the **Build Function** command, the content of the **Select Function** dialog is immediately read.

Enabling JAWS to Read ListView Headers

ListViews display information in a table format within the Oracle Smart View for Office user interface. Examples of dialog boxes that display information in the ListView format are **Select Forms** or **Manage Journals**.

ListView headers are the column headings within a ListView. By default, JAWS does not read the ListView headers; however, you can enable JAWS to read them.

To enable JAWS to read ListView headers:

1. Ensure that JAWS is running.
2. Within a ListView, select a row containing data, then press **Insert+F2**.
3. In the **Run JAWS Manager** dialog box, select **Customize ListView** and press **Enter**.
The **Customize Headers** dialog box is displayed
4. In the **Column Headers** group, select the **Speak Custom Text AND Header** option.

5. Click **OK** to save the changes.

JAWS should begin speaking the column headers in the ListView element. If this doesn't happen, restart the Office application.

Using Microsoft Office Themes (Including Dark Theme)

Starting in release 23.100, Oracle Smart View for Office supports the themes provided by Microsoft Office. In addition to the default Colorful theme, you can now apply the Dark Gray, Black, and White themes while working in Smart View.

Note:

- Black theme is available only with a Microsoft Office 365 subscription.
- Office themes are supported in Smart View and in its extensions from Microsoft Office 2016 onwards. Office themes are not supported on Office 2013.

Once applied, the background color and font color changes are seen for interface elements such as ribbons, Smart View panels and its menus, POV toolbar, formula bar, sheet tabs, and dialog boxes such as Comments, Adjust, Business Rules, Smart View Options, and so on. Office themes are also supported for the following extensions in Smart View:

- Narrative Reporting extension
- EPM Books extension
- Oracle Journals for Financial Management
- Oracle BI EE extension
- Smart Query

To enable Office themes:

1. In your Office application, click **File** and then click **Options**.
2. In the **General** tab, under **Personalize your copy of Microsoft Office** section, select the required theme from the **Office Themes** list.

Note:

If you have enabled any system-level dark themes, then you can apply the same in your Office application by selecting the **Use system setting** option and use Smart View in a dark theme.

3. Click **OK**.

Note the following considerations while using themes:

- While switching between themes, the new theme gets applied immediately to all interface elements, except the Smart View panels and POV dialogs of active ad hoc and form sheets. You need to restart the Office application to apply the theme to the panels and POV dialogs on already opened Smart View files.
- List view and tree view always retain the white background, irrespective of the theme applied.

- Black theme cannot be fully applied to toolbars and menus in panels and dialog boxes. Instead, these appears with a gray background.
- If high contrast is enabled at system level, then the Office theme is ignored.

3

Access Keys in Smart View

This topic covers the access keys used in Oracle Smart View for Office for the following components:

- [Ribbons](#)
- [Panels](#)
- [Right-Click Context Menu](#)

Ribbons

Describes the ribbon access keys used in Oracle Smart View for Office.

Smart View uses standard Microsoft Office navigation to view and access the Smart View and provider ribbons.

Access keys (also referred to as keyboard shortcuts or keyboard equivalents) allow you to select Office and Smart View ribbon menu items with the keyboard, instead of a mouse.

For example, to view ribbon access keys, you can:

- Press the **Alt** key
- Press and hold the **Function** key, then press **F6** repeatedly to navigate to the ribbon

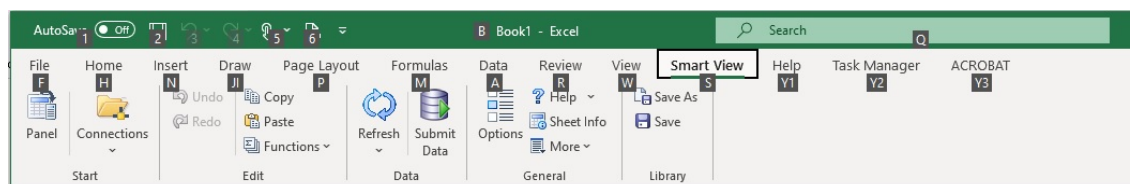
Either method displays the keyboard shortcuts.

If JAWS is enabled, then JAWS is reading ribbon items aloud to you.

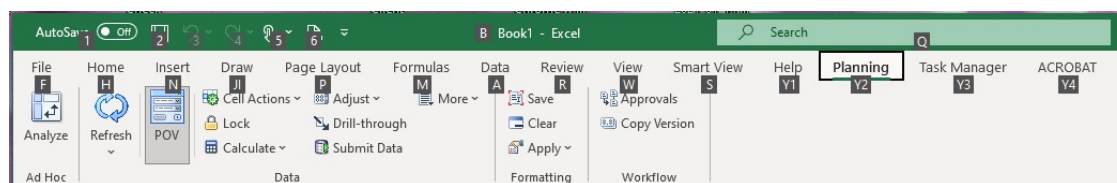
It is important to note that keyboard shortcuts for the Smart View ribbon and the provider ribbons may vary if other Office add-ins or Smart View extensions are installed, and enabled or disabled. For example, the keyboard shortcut **Y1** may become **Y2**, **Y3**, or even higher key combinations if there are ribbon tabs created by add-ins and extensions in addition to Smart View.

To illustrate, in [Figure 1](#), the Task Manager extension is enabled and assigned the **Y2** shortcut.

Figure 3-1 Ribbon Tabs in Excel with Task Manager Extension Enabled

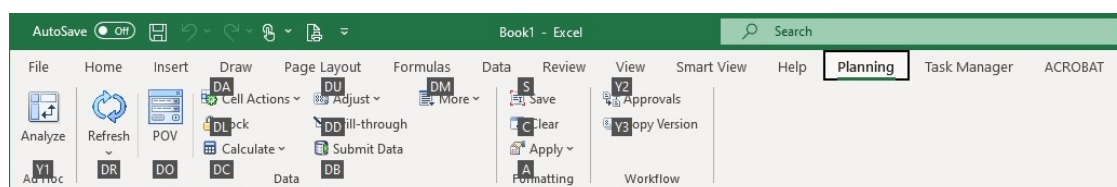


After you log in and begin working in Smart View, the shortcut sequence can change. In [Figure 2](#), a Planning form is launched. The Planning ribbon is now displayed in order to work with the form. The Planning ribbon now uses the **Y2** shortcut, while the Task Manager extension is now using **Y3**.

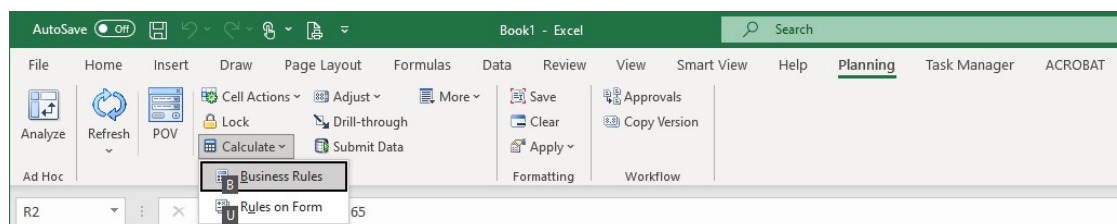
Figure 3-2 Change in Task Manager Shortcut After Launching a Planning Form

This type of shortcut numbering pattern also occurs when using other functionality, such as launching ad hoc grids or working with extensions where the tab is not persistently displayed; that is, it's displayed once the functionality is launched. For example, the EPM Books extension tab is not persistently displayed. When you work with EPM Books, then the EPM Books ribbon tab is displayed, and the resulting shortcut key order may differ.

You access ribbon items and any submenus using access keys. For example, **Y2** accesses the Planning ribbon and displays the access keys:

Figure 3-3 Planning Ribbon with Access Keys Displayed

Ribbon items with a downward-pointing arrow next to them (▼) contain submenus. In [Figure 3](#), several ribbon items, such as **Calculate** and **Adjust**, contain submenus. Use the shortcut keys to access the submenu and make a selection. For example, to access the submenu on **Calculate** and then select **Business Rules** from the submenu, you enter the shortcut keys, **Alt+Y2+DC+B**.



In all cases, the shortcut to access the provider or extension ribbon can vary depending on the add-in and extensions, Smart View or others, you have installed.

Some shortcuts remain consistent regardless of the extensions you have installed and enabled. For example, in the cases noted above, the shortcut to the Smart View ribbon is always the letter **S**.

**Note:**

Keyboard equivalents for languages other than English may be different from those noted in this guide.

Panels

This topic covers the access keys used for navigating the following panels in Oracle Smart View for Office:

- [Smart View Panel](#)
- [Query Designer Panel](#)
- [Smart Query Panel](#)
- [Narrative Reporting Panels](#)

Smart View Panel

Displays the access keys for navigating in the Smart View panel.

See [Considerations](#) for information on access keys for the Document Contents pane.

Keys	Action
Alt+S+P	Launch the Smart View Panel
F6	Cycle through the active Office ribbon tab; the active Office application area, such as a sheet, document, or slide; the task pane that displays the Smart View Panel; and the Office status bar
Tab	Move through Smart View Panel from top to bottom
Shift+Tab	Move through Smart View Panel from bottom to top
Up and down arrow keys	Scroll through items in tree view Activate the drop-down menu on the Home button and Go button
Left and right arrow keys	In toolbars, move through buttons In tree views, expand or collapse a node
Alt+down arrow	Open the drop-down menu
Up and down arrow keys	Scroll through drop-down list
Enter	Select an item in the drop-down menu
Escape	Cancel selection

Considerations

- **Document Contents Pane**

After launching an ad hoc grid or form, the Document Contents pane is displayed in the lower portion of the Smart View Panel. In the Document Contents pane, you use the keys noted above to navigate most user interface elements in the pane. You use the **Tab** key, arrow keys, and the space bar, to navigate to and select buttons that minimize and maximize the entire pane as follows:

- To minimize the Document Contents pane:
Press **Tab** to navigate to the **Minimize** button, , and then press the **Space** bar to activate the button and minimize the pane.
- To maximize the Document Contents pane:
Press **Tab** to navigate to the **Minimize** button, , then use the right arrow key to move to the **Maximize** button, , and then press the **Space** bar to activate the button and maximize the pane.

- To restore the Document Contents pane when the pane has been maximized:

Press **Tab** to navigate to the **Switch to** button, , then use the right arrow key to move to the **Minimize** button, , and then press the **Space** bar to activate the button.

If the previous state of the pane was minimized, then the pane is again minimized.

If the previous state of the pane was the initial split view (Smart View Panel on top, Document Contents pane at the bottom), then the pane is restored to the split view.

- To restore the initial split view of the Smart View Panel and Document Contents pane when Document Contents is minimized:
Press **Tab** to navigate to the **Split** button, , and then press the **Space** bar to split and restore the initial panel view with the Smart View Panel at the top and the Document Contents pane at the bottom.

- **Smart View Panel**

Use the **Tab** key, arrow key, and space bar to minimize and expand the entire Smart View Panel, including the Document Contents pane:

- To minimize the Smart View Panel:

Press **Tab** to navigate to the **Switch to** button, , then press the right arrow key to move to the **Minimize the Smart View Panel** button, , and then press the **Space** bar to activate the button and minimize, or collapse, the Smart View Panel.

- To maximize the Smart View Panel:

Press **Tab** to navigate to the **Switch to** button, , then press the right arrow key to move to the **Maximize the Smart View Panel** button, , and then press the **Space** bar to activate the button and

Query Designer Panel

Displays the access keys for navigating in the Query Designer panel.

Keys	Action
F6	Cycle through the active Excel ribbon tab; the active Excel sheet, and the sheet name; the task pane that displays the Smart View Panel, if open; the Query Designer; and the Office status bar
Tab	When in focus, moves through the dimensions on the Query Designer
Ctrl+Enter, when selected on a row or column dimension	Launches the Member Selection dialog box and highlights the corresponding dimension on the query sheet
Ctrl+Enter, when selected on a POV dimension	Adds the selected dimension to the Row dimensions group in the Query Designer

Smart Query Panel

Displays the access keys for navigating in the Smart Query panel.

Keys	Action
F6	Cycle through the active Excel ribbon tab; the active Excel sheet, and the sheet name; the task pane that displays the Smart Query Panel; and the Office status bar
Ctrl+Enter	Set focus from a dimension down to its properties
Ctrl+X and Ctrl+V	Move dimensions between axes (select dimension, Ctl+X to cut dimension, Tab to target dimension, then Ctl+V to paste dimension)

Narrative Reporting Panels

Displays the access keys for navigating in the Narrative Reporting panels on Oracle Smart View for Office.

Keys	Action
F6	Cycle through the active Office ribbon tab; the active Office application area, such as a sheet, document, or slide; the task pane that displays the Narrative Reporting panel, such as the Report Center or Variables panel; and the Office status bar

Considerations

- The Narrative Reporting extension interface in Smart View consists of various panels, including the Report Center panel, the Variables panel, and the Review instance panels.
- On laptops, the Function+F6 key combination may not work correctly. To activate accessibility so that Function+F6 works and moves you through the Narrative Reporting panel and Office components, press the Alt key first.

On an external keyboard, the F6 key will work correctly without first using the Alt key.

Right-Click Context Menu

In Oracle Smart View for Office, you can right-click on a member or data cell in forms and ad hoc grids to access the right-click context menu. This menu provides a convenient way to access frequently used and context-specific operations.

To access this menu using keyboard, use the standard mnemonics, that is the underlined letters that typically appears in a menu item.

For menus in which the underlined mnemonic does not appear, the first letter acts as the mnemonic. If there are multiple menu items starting with the same letter, then use the same mnemonic to toggle between the menu items.

For example, in the absence of an underlined letter in the menu item **Clear Plan Targets**, the letter "C" acts as the mnemonic. Pressing **C** initiates the **Clear Plan Targets** operation.

	A	B
1		
2		Jul
3	Days Sales Outstanding	1000
4	Bad Debt % of Sales	1%
5	Days in Inventory	35
6	Prepaid Exp % of OpEx	15%
7	Days Payables Outstanding	60
8	Accrued Payroll % of Employee Exp	25%
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		
25		

Paste Options:

- Paste Special...
- Smart Lookup
- Insert...
- Delete...
- Clear Contents
- Quick Analysis
 - Filter >
 - Sort >
 - Get Data from Table/Range...
 - New Comment
 - New Note
 - Format Cells...
 - Pick From Drop-down List...
 - Define Name...
- Link >
- Smart View >

I	J	K
FY23		
Feb	Mar	Apr
0	0	0
#Missing	#Missing	#Missing
#Missing	#Missing	#Missing
#Missing	#Missing	#Missing
#Missing	#Missing	#Missing
#Missing	#Missing	#Missing

- Drill-through
- Cell Comments
- Supporting Details
- Cell Attachment
- Cell History
- Lock
- Adjust >
- Options...
 - Allocate Plan Targets
 - Clear Plan Targets

4

Installing and Configuring Help Locally

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

However, you may require that the help be installed locally for Section 508 accessibility purposes. To accommodate this, help must be downloaded from My Oracle Support and placed on a local drive, and the Smart View `properties.xml` file must be modified..

To install and configure Smart View help locally:

1. Obtain the help zip file for this release from My Oracle Support.
2. Extract the contents of the patch zip file to a local folder on the computer where Smart View is installed.

For example, extract the contents locally to:

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

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

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


\zh_TW

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

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

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

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

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

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

 Tip:

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

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

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

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