

Oracle[®] Smart View for Office Installation and Configuration Guide



Release 21.200

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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

ORACLE[®]

Oracle Smart View for Office Installation and Configuration Guide, Release 21.200

F49525-07

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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 Installation and Configuration

This help includes topics on these subjects:

- Installing Oracle Smart View for Office
- Administering extensions
- Configuring shared connections in an XML file
- Configuring locally-installed help
- Troubleshooting tips
- Limitations

To find information in this help, click **Contents** or **Search** in the left frame.

2

Installing Smart View

Related Topics

- [About Installing Smart View](#)
- [Installation Guidelines](#)
- [Installing from My Oracle Support or Oracle Technical Resources](#)
- [Installing Browser Add-ons](#)
- [Installing by Autodeployment in EPM System](#)
- [Installing from EPM Workspace](#)
- [Installing from Oracle BI EE](#)
- [Running Command Line or Silent Installations](#)
- [Downloading Help for Local or Web Server Installation](#)
- [Uninstalling Smart View](#)

About Installing Smart View

Oracle Smart View for Office uses a single installer for 64-bit and 32-bit versions of Microsoft Office, starting with release 11.1.2.5.

Late-breaking information about the Smart View installation is provided in the *Oracle Smart View for Office Readme* . You should thoroughly review this chapter along with the information in the readme before installing Smart View.

Late-breaking information about installing client products in Oracle Enterprise Performance Management Cloud environments is provided in the *What's New* document for each service. Review this information thoroughly before installing client products.

Late-breaking information about the installation of Oracle Enterprise Performance Management 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

Related Topics

- [Installation and Windows Access Control Settings](#)
- [Installer Language](#)
- [Microsoft .NET Framework Support](#)
- [Internet Explorer 11 End of Support and Smart View](#)
- [Microsoft Edge WebView2 Support](#)
- [BiDi Support in Installer](#)

- [Upgrading from Smart View 11.1.1.3.x or Earlier](#)
- [Oracle BI EE Extension Users: Upgrading from Smart View 11.1.2.5.500 or Earlier](#)
- [Oracle BI EE Version Requirement for Multiple Connection and View Designer Features](#)
- [Planning Offline Support](#)

Installation and Windows Access Control Settings

Starting with the 11.1.2.5.400 release, you can install Oracle Smart View for Office 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 [Tips and Troubleshooting](#) if you encounter issues related to installation.

Table 2-1 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 |
| Non-admin user | The user installing Smart View may or may not be a member of the Administrators group. Note: Not supported on 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:
 - The Smart View ribbon may fail to appear on Windows 10.
See [Smart View Ribbon Fails to Display After Non-Admin Installation on Windows 10](#) for steps to take to display the ribbon.
 - Launching Office applications with Smart View content from Internet Explorer will fail in protected mode.

 **Note:**

Starting with Oracle Enterprise Performance Management System Release 11.2.2 and the Oracle Enterprise Performance Management Cloud 20.09 update, Internet Explorer is no longer supported. This information is kept here for the purpose of backward compatibility.

- 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).
- Silent installations are not supported for non-admin users. When attempting a silent installation, the `/s` flag is ignored for non-admin users, causing the Smart View product installer to launch.
- Non-admin users are not authorized to install Smart View in the `C:\Program Files` or `C:\Program Files (x86)` folders.

Installer Language

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.

However, some messages, both on-screen and in the log file, cannot be translated and will appear in English.

For more information about language settings, see [Windows, Office, and Smart View Locale Settings](#).

Microsoft .NET Framework Support

Oracle Smart View for Office requires a supported version of Microsoft .NET Framework. Oracle recommends using .NET Framework 4.8 or higher.

Note that Microsoft .NET Framework 4.5.2, 4.6, and 4.6.1 are no longer supported after April 26, 2022. For more information, see [.NET Framework 4.5.2, 4.6, 4.6.1 will reach End of Support on April 26, 2022](#).

Internet Explorer 11 End of Support and Smart View

Microsoft has announced end of support of Internet Explorer 11 by June 15, 2022.

Do not uninstall Microsoft Internet Explorer, even after the end-of support date of June 15, 2022. Instead, you may securely disable Internet Explorer following Microsoft's guidelines. In situations where the Internet Explorer browser would be called, the Edge browser will be launched instead.

Oracle Smart View for Office does not require the Internet Explorer browser specifically. However, Smart View depends on WinInet APIs that may have dependencies on Internet Explorer. Microsoft recommends keeping Internet Explorer installed on the machine since uninstalling may cause other applications that are dependent on it to work incorrectly. Microsoft also recommends updating to the latest security patches as they become available.

Microsoft Edge WebView2 Support

Oracle Smart View for Office uses the Microsoft Internet Explorer module to display the authentication page. But certain authentication schemes may require newer controls, such as WebView2, to process a complex login sequence. To use WebView2, Microsoft Edge WebView2 Runtime should be installed and enabled on each Smart View client machine.

Starting with the 21.100 release, Smart View supports WebView2. During runtime, Smart View detects the presence of Microsoft Edge WebView2 Runtime installed on the machine and launches the WebView2-based dialog to host the login page.

Once WebView2 is installed on Smart View client machines, users can enable it in the **Smart View Options** section of **Health Check** (described in [Performing a Health Check On Your System](#) in the *Oracle Smart View for Office User's Guide*). WebView2 can also be enabled by editing the Smart View `properties.xml` file (by default in `C:\Oracle\SmartView\cfg`).

Administrators: If WebView2 is required to handle the login sequence used by your organization, then you should ensure that Microsoft Edge WebView2 Runtime is installed and enabled on the machines running Smart View. If you are installing Microsoft Edge WebView2 Runtime, Oracle recommends using the Evergreen version. Only WebView2 versions 86.0.616.0 and later are supported.

Once installed, Microsoft distributes WebView2 updates on a regular cadence, unless a fixed version was installed. Administrators can use their own internal procedures to download and distribute Microsoft Edge WebView2 Runtime to Smart View users. The download is here:

<https://docs.microsoft.com/en-us/deployoffice/webview2-install#webview2-runtime-installation>

For more information, see the [WebView2](#) documentation.

BiDi Support in Installer

The Oracle Smart View for Office 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.

Upgrading from Smart View 11.1.1.3.x or Earlier

When upgrading from Oracle Smart View for Office release 11.1.1.3.x or earlier, Oracle recommends uninstalling Smart View before installing this release.

Oracle BI EE Extension Users: Upgrading from Smart View 11.1.2.5.500 or Earlier

If you're using the Oracle BI EE extension, and upgrading from Oracle Smart View for Office 11.1.2.5.500 or earlier to Smart View 11.1.2.5.510 or later, a complete uninstall of Smart View is required:

1. Close all Office applications.

2. Uninstall Smart View from the Windows Control Panel.
3. Install Smart View.

See [Installing from My Oracle Support or Oracle Technical Resources](#).

Oracle BI EE Version Requirement for Multiple Connection and View Designer Features

To use the multiple connection and View Designer features described below, ensure that the Oracle Business Intelligence Enterprise Edition 11.1.1.7.140527 patch or higher is installed. 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 Oracle Smart View for Office to edit views that were *created* and *inserted* using the View Designer.

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

Planning Offline Support

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



Note:

Planning Offline is supported with Oracle Hyperion Planning on-premises only. Planning Offline is not supported with the Planning business process in Oracle Enterprise Performance Management Cloud.

Installing from My Oracle Support or Oracle Technical Resources

To install Oracle Smart View for Office directly from My Oracle Support (MOS) or Oracle Technology Resources (OTR; formerly Oracle Technology Network, OTN):

1. Before you begin:
 - If you are upgrading to this release from an earlier Smart View release, Oracle recommends that you first uninstall the earlier release before installing this release. See [Uninstalling Smart View](#).

- Ensure that a supported version of Microsoft .NET Framework is installed on the computer where you are installing Smart View. See [Microsoft .NET Framework Support](#) for .NET requirements.
A supported version of Microsoft .NET Framework is required to install and use Smart View.
 - Review the information in [Installation Guidelines](#).
2. Close all Microsoft Office applications, including Outlook.

 **Note:**

Oracle recommends ensuring that all Microsoft Office processes are terminated on the machine where you plan to install Smart View. In Windows Task Manager, check for and terminate these Office processes: Excel, Word, PowerPoint, and Outlook.

3. Download the Smart View zip file from either MOS or OTR:
 - From MOS:
<https://support.oracle.com/oip/faces/secure/km/DocumentDisplay.jsp?id=1923582.1>
This Knowledge Article provides a link to the current version of Smart View.
 - From OTR:
<https://www.oracle.com/middleware/technologies/epm-smart-view-downloads.html>
Before downloading, review the "Oracle License Agreement" accessed from the Smart View download page to ensure that your usage is compliant.
4. Unzip the file to a temporary location.
5. To start the installation wizard, right-click `SmartView.exe` and select **Run as administrator**.
You may also double-click `SmartView.exe` to start the installation wizard; however, some configurations may require **Run as administrator**. Therefore, Oracle recommends using the **Run as administrator** command to ensure that all functionality is properly enabled and all required Windows Registry entries are set. See [Installation and Windows Access Control Settings](#) for more information.
6. 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.

 **Note:**

Oracle recommends installing in the default location or in a location that does not contain any spaces in the installation path. For example, Oracle does *not* recommend installing in C:\Program Files or C:\Program Files (x86).

7. When installation is complete, click **OK**.

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

 **Note:**

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. If the extension is not already installed and it is not disabled, then it is installed the first time you start Office.

8. If you plan to use drill-through reports or web launch, a browser add-on is required for all supported browsers (Microsoft Edge, Mozilla Firefox, and Google Chrome). See [Installing Browser Add-ons](#) for more information.

 **Note:**

If you encounter issues related to installation and startup, see [Tips and Troubleshooting](#).

Installing Browser Add-ons

You can use Oracle Smart View for Office to interact with web browser applications, such as Financial Consolidation and Close or Oracle Hyperion Planning, in two ways:

- Starting in a form or ad hoc grid in Smart View, use drill-through to launch an application web page in a browser
- Starting in a web application, launch a form or ad hoc grid in Smart View for Excel.

If your default browser is Mozilla Firefox, Google Chrome, or Microsoft Edge, you'll require a Smart View add-on for drill-through and web launch.

[Table 1](#) summarizes the browser add-on requirements.

 **Note:**

If your default browser is Microsoft Internet Explorer, drill-through and web launch are fully supported and require no additional add-on. However, note that starting with Oracle Enterprise Performance Management System Release 11.2.2 and the Oracle Enterprise Performance Management Cloud 20.09 update, Internet Explorer is no longer supported. For more information, see [Internet Explorer 11 End of Support and Smart View](#).

Table 2-2 Browser Add-on Requirements for Drill-Through and Web Launch

| Browser | Add-on Required? |
|-----------------------------|------------------|
| Mozilla Firefox | Yes |
| Google Chrome | Yes |
| Microsoft Edge | Yes |
| Microsoft Internet Explorer | No |

 **Note:**

Starting with EPM System Release 11.2.2 and the EPM Cloud 20.09 update, Internet Explorer is no longer supported.

For instructions on obtaining and installing the add-on for Firefox, Chrome, and Edge, see:

- [Mozilla Firefox](#)
- [Google Chrome](#)
- [Microsoft Edge](#)

The following subtopics provide the default instructions for installing the browser add-ons and assume access to web app stores. If your users require a method for installing the add-ons without directly accessing a web app store, see [Alternative Methods for Installing Browser Add-ons](#) to explore other methods for installing the add-ons for Chrome and Edge.

Mozilla Firefox

To use Smart View 11.1.2.5.810+ with Mozilla Firefox ESR 60+, you must install the Oracle Smart View for Office web extension for Firefox.

You can get the extension by searching on "smartview" on the [Firefox Add-ons](#) download site or by going directly to this link:

<https://addons.mozilla.org/en-US/firefox/addon/oracle-smart-view-for-office>

Click the **+ Add to Firefox** button and follow the prompts to add the extension.



Note:

If you are using earlier versions of Firefox, then no add-on is required.

Google Chrome

EPM Cloud 17.06+ supports interoperability with Google Chrome and Smart View 11.1.2.5.700+.

To use Google Chrome with Smart View, install the Oracle Smart View for Office web extension from the Chrome Web Store. You can get the extension by searching on "smartview" in the [Chrome Web Store](#) or by going directly to this link:

<https://chrome.google.com/webstore/detail/oracle-smart-view-for-off/cjbpfomijhkmfkembnjejkphihjnomne>

Click the **+ Add to Chrome** button and follow the prompts to add the extension.

Microsoft Edge

EPM Cloud 20.04+, EPM System 11.2.1+, and EPM System 11.1.2.4.825+ support interoperability with Microsoft Edge based on Chromium 80+ and Smart View 11.1.2.5.910+.

To use Microsoft Edge with Smart View, you must enable Edge to allow extensions from other stores, and then install the Oracle Smart View for Office web extension from the Chrome Web Store.

To enable Edge to allow extensions from other stores:

1. Install the latest version of Edge from [Microsoft](#).
2. In the upper right corner of Edge, click **Settings and more**, **⋮**, and then select **Extensions**.
3. At the bottom of the left pane, enable **Allow extensions from other stores**.
4. At the **Allow extensions from other stores** prompt, click **Allow**.
5. Now go to the Chrome Web Store using this link:

<https://chrome.google.com/webstore/detail/oracle-smart-view-for-off/cjbpfomijhkmfkembnjejkphihjnomne>

You can also get the extension by searching on "smartview" in the Chrome Web Store.

6. Click the **+ Add to Chrome** button and follow the prompts to add the extension.

Alternative Methods for Installing Browser Add-ons

In some organizations, users are not allowed direct access to the Chrome Web Store where they can download the add-on, or extension file, for Google Chrome or Microsoft Edge. If this

is the case in your organization, you can refer to the information in the following Chrome help topic to facilitate installing the add-on for your users:

[Alternative extension distribution options](#)

In particular, Oracle recommends the following two methods to facilitate installing the add-on for your users.

- [Installing the Smart View Chrome Extension Using the Windows Registry](#)
- [Installing the Chrome Extension for Smart View Using the Downloaded CRX File](#)



Note:

Both methods can be used with Google Chrome or Microsoft Edge.

Installing the Smart View Chrome Extension Using the Windows Registry

General instructions for installing extensions using the Windows Registry are found in the Chrome help topic, [Using the Windows registry](#).

Information specific to Oracle Smart View for Office is noted in the following procedures.

To install the add-on using the the Windows Registry:

1. Open the Windows Registry Editor.
2. Locate the following key in the registry; create this key if it is not present.

Chrome:

- 32-bit Windows:
`HKEY_LOCAL_MACHINE\Software\Google\Chrome\Extensions`
- 64-bit Windows:
`HKEY_LOCAL_MACHINE\Software\Wow6432Node\Google\Chrome\Extensions`

Edge:

- 32-bit Windows:
`HKEY_LOCAL_MACHINE\Software\Microsoft\Edge\Extensions`
- 64-bit Windows:
`HKEY_LOCAL_MACHINE\Software\Wow6432Node\Microsoft\Edge\Extensions`

3. Under the Extensions key, create a new key (folder) with this name:

`cjbpfomjjhkmfkembnjejkphihjnomne`

The letter combination noted above is specific to the Oracle Smart View for Office extension for Chrome and Edge.

4. In the extension key, create this property:

`update_url`

Then set the value of the new property to this URL:

```
https://clients2.google.com/service/update2/crx
```

This URL points to the extension's CRX file in the Chrome Web Store.

5. Verify that the extension is installed.

- **Chrome**

Launch the Chrome browser and, in the address bar, enter:

```
chrome://extensions
```

The **Oracle Smart View for Office** extension is listed in the **Extensions** page.

- **Edge**

Launch the Edge browser, select the **Settings and more** icon, **⋮**, and then select **Extensions**.

The **Oracle Smart View for Office** extension is listed in the **Extensions** page under **Installed extensions**.

Installing the Chrome Extension for Smart View Using the Downloaded CRX File

In this procedure, you work with the downloaded Chrome extension CRX file for Smart View.

1. Download the Smart View extension CRX file from the following location to a temporary location on your computer (such as the Downloads folder):

[Link to Smart View Chrome Extension CRX File](#)

 **Note:**

Typically, this step is performed by someone with access to the Chrome Web Store.

The following steps can be automated by an administrator or can be performed by users if they have access to the CRX file and can enable **Developer mode** on their Chrome or Edge browser.

2. Perform the procedure for Chrome or Edge, as you require:

Chrome:

- a. Launch the Chrome browser, click the Chrome menu icon, **⋮**, then select **More tools**, and then select **Extensions**.
- b. Ensure that the **Developer mode** check box in the upper right corner is enabled.
- c. Use drag-and-drop to drag the CRX file from the temporary location you used in step 1, and drop it into the **Extensions** window to install.
- d. To verify the install, relaunch the Chrome browser and, in the address bar, enter:

```
chrome://extensions
```

The **Oracle Smart View for Office** extension is listed in the **Extensions** page.

Edge:

- a. Launch the Edge browser, click the **Settings and more** menu icon, **⋮**, and then select **Extensions**.
- b. Ensure that the **Developer mode** check box in the lower left corner is enabled.
- c. Use drag-and-drop to drag the CRX file from the temporary location you used in step 1, and drop it into the **Extensions** window to install.
- d. To verify the install, relaunch the Edge browser and, in the address bar, enter:

```
edge://extensions
```

The **Oracle Smart View for Office** extension is listed in the **Extensions** page.

3. **Optional:** In your Chrome or Edge browser, disable the **Developer mode** check box, per your organization's requirements.

Installing by Autodeployment in EPM System

These instructions are for upgrading from Oracle Smart View for Office 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 Oracle Smart View for Office:

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:** Autodeployment is enabled by default starting in Financial Management 11.1.2.4. To configure Financial Management to turn off messages about upgrading Smart View, complete the procedure in Oracle Support Document 1993603.1 on My Oracle Support:
https://support.oracle.com/knowledge/Enterprise%20Performance%20Management%20and%20Business%20Intelligence/1993603_1.html
 - **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 Oracle Technical Resources (OTR) or My Oracle Support (MOS), as described in [Installing from My Oracle Support or Oracle Technical Resources](#).
 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\EPMSystem11R1\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:

- **OTR 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 OTR, 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 [OTR Option](#) in [Option B](#), then your users will be directed to Oracle Technical Resources (OTR) for the Oracle Smart View for Office download. In that case, your users should follow the instructions for OTR download and installation in [Installing from My Oracle Support or Oracle Technical Resources](#).

If you did not choose the [epmstatic Option](#) or [Web App Server Option](#) in [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:
 - Oracle Essbase: `http://<server>:19000/aps/SmartView`
 - Oracle Hyperion Planning: `http://<server>:19000/HyperionPlanning/SmartView`
 - Oracle Hyperion Financial Management: `http://<server>:19000/hfmoofficeprovider/hfmoofficeprovider.aspx`
 - Oracle Hyperion 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 browser that launches, in **File Download**, select **Run**.
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

To install Oracle Smart View for Office from Oracle Hyperion Enterprise Performance Management Workspace:

1. Before you begin:
 - The Smart View installer is located on the Oracle Technology Network. You must be able to access the internet and download files in order to continue with this installation.
 - If you are upgrading to this release from an earlier Smart View release, Oracle recommends that you first uninstall the earlier release before installing this release. See [Uninstalling Smart View](#).
 - Ensure that Microsoft .NET Framework 4.5 or higher is installed on the computer where you are installing Smart View.
Microsoft .NET Framework 4.5 or higher is required to install and use Smart View.
 - Review the information in [Installation Guidelines](#).
2. Close all Microsoft Office applications, including Outlook.
3. In EPM Workspace, select **Tools**, then **Install**, and then **Smart View**.

This takes you to the Oracle Smart View for Office software download page on Oracle Technical Resources (OTR) here:

<https://www.oracle.com/middleware/technologies/epm-smart-view-downloads.html>

4. On OTR, click the **Download Now** link to begin the download process.
5. In the Smart View download prompt, click **Oracle License Agreement** and review to ensure that your usage is compliant.
6. After reviewing the Oracle License Agreement, return to the Smart View software download page and click the **Download svc<version>.zip** button to begin the download.
7. Using your browser's download procedures, save the file, and then unzip it to a temporary location.
8. To start the installation wizard, in the temporary location from the previous step, right-click `SmartView.exe` and select **Run as administrator**.

You may also double-click `SmartView.exe` to start the installation wizard; however, some configurations may require **Run as administrator**. Therefore, Oracle recommends using the **Run as administrator** command to ensure that all functionality is properly enabled and all required Windows Registry entries are set. See [Installation and Windows Access Control Settings](#) for more information.

9. 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.

10. When installation is complete, click **OK**.

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

 **Note:**

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. If the extension is not already installed and it is not disabled, then it is installed the first time you start Office.

11. If you plan to use drill-through reports or web launch, a browser add-on is required for all supported browsers (Microsoft Edge, Mozilla Firefox, and Google Chrome). See [Installing Browser Add-ons](#) for more information.

Installing from Oracle BI EE

Related Topics

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

Configuring the BI Home Page

Note:

Configuring a custom download link for the Smart View installer applies to Oracle Business Intelligence Enterprise Edition 11.1.1.7.1 and later versions, and might not be available in earlier versions.

Starting in Oracle BI EE release 11.1.1.9, the **Smart View for MS Office** link on the **Download BI Desktop Tools** drop-down list points to the Oracle Smart View for Office download on Oracle Technology Network.

If you do not want to direct your users to Oracle Technology Network, you can configure the **Smart View for MS Office** link 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
- An internal URL, such as internal web page or intranet location 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 BI Home Page

To install Oracle Smart View for Office from Oracle Business Intelligence Home:

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

If you are directed to the Smart View download page on Oracle Technology Network, then follow the procedure in [Installing from My Oracle Support or Oracle Technical Resources](#). Otherwise, proceed with step 2.

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.

Note:

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 you start Office if the Oracle BI EE extension is not already installed and it is not disabled.

Running Command Line or Silent Installations

Oracle Smart View for Office can be installed from the command line.

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

Related Topics:

- [Before You Begin](#)
- [Command Line and Silent Installation Options](#)
- [Installing Using Command Line or Silent Install Options](#)
- [Installing Smart View Extensions Silently](#)

Before You Begin

- Complete steps 3 and 4 in [Installing from My Oracle Support or Oracle Technical Resources](#) to download the Smart View installation zip file and unzip it to the folder you will be working in.
- Oracle recommends ensuring that all Microsoft Office processes are terminated on the machines where a silent installation or upgrade will be running. In Windows Task Manager, the Office processes to check for and terminate are Excel, Word, PowerPoint, and Outlook.

Command Line and Silent Installation Options

Use the options in [Table 1](#) to install Smart View from the command line and for silent installations.

Table 2-3 Options for Command Line and Silent Installations of Smart View

| Option | Usage |
|--|--|
| <code>/v "command line options"</code> | <p>Specifies command line options to be passed to the Smart View MSI installer.</p> <p>For example, to specify the installation directory, use:</p> <pre>/v "INSTALLDIR=<target_path>"</pre> <p>To enable logging, use:</p> <pre>/v "l*v <log_file_path_and_name>"</pre> |
| <code>/s</code> | <p>Unless the <code>/v</code> parameter contains any <code>/q</code> specifier, the wrapper passes <code>/qb+</code> to the MSI.</p> <p>Runs the Smart View installer in silent mode.</p> <p>The <code>/s</code> flag is converted to <code>/qn</code> and passed to the MSI. There is no need to specify the <code>/qn</code> parameter if <code>/s</code> is already present in your script.</p> |

Table 2-3 (Cont.) Options for Command Line and Silent Installations of Smart View

| Option | Usage |
|------------------------------|--|
| INSTALLDIR=<target_path> | Specifies the installation directory. |
| l*v <log_file_path_and_name> | Enables logging. Unless the /v parameter contains any /q specifier, the wrapper passes /qb+ to the MSI. |
| /a | Extracts the MSI file. |
| /Office=64 | Installs or uninstalls only the 64-bit version of Smart View |
| /Office=32 | Installs or uninstalls only the 32-bit version of Smart View |
| /i | Specifies the path to the extension installer: |
| | i <path to the extension installer> |
| | For example: |
| | svlaunch.exe /i C:\Oracle\SmartView\extensions\SVFMJournalInstaller.svext |
| /extensionupdatelist= | Path to UpdateList.xml. |
| /x | Uninstalls Smart View. |



Note:

Oracle recommends installing in the default location or in a location that does not contain any spaces in the installation path. For example, Oracle does *not* recommend installing in C:\Program Files or C:\Program Files (x86).

 **Note:**

- 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.
- Silent installations are only supported for admin users.

Installing Using Command Line or Silent Install Options

To perform command line or silent installations:

1. Open a command prompt using the "Run as administrator" option.
2. Navigate to the directory of the Smart View installer.
3. Run the installation commands in [Table 1](#); for example:

- To install in the default directory, run:

Silent:

```
SmartView.exe /s
```

Command line:

```
SmartView.exe
```

- To install in another directory, run:

Silent:

```
SmartView.exe /s /v "INSTALLDIR=<target_path>"
```

For example:

```
SmartView.exe /s /v "INSTALLDIR=D:\SmartView"
```

Command line:

```
SmartView.exe /v "INSTALLDIR=<target_path>"
```

For example:

```
SmartView.exe /v "INSTALLDIR=D:\SmartView"
```

- To specify the location of `UpdateList.xml`, run:

Silent:

```
SmartView.exe /s /extensionupdatelist=<path to UpdateList.xml>
```

Command line:

```
SmartView.exe /extensionupdatelist=<path to UpdateList.xml>
```

- To run a silent installation and log the installation sequence:

Silent:

```
SmartView.exe /s /v "INSTALLDIR=D:\SmartView /L*v c:\install.log"
```

Command line:

```
SmartView.exe /v "INSTALLDIR=D:\SmartView /L*v c:\install.log"
```

- To uninstall:

Silent:

```
.\SmartView.exe /x "/s /v/qn /L*v C:\Share\installLog.log"
```

Command line:

```
.\SmartView.exe /x "/v/qn /L*v C:\Share\installLog.log"
```

Installing Smart View Extensions Silently

Administrators can push extension installations silently by calling the following command:

```
svlaunch.exe /i <path to the extension installer>
```

For example, after a typical Oracle Smart View for Office installation, Smart View is installed on C:\Oracle\SmartView. In this installation, the extensions included with Smart View are located in C:\Oracle\SmartView\extensions. Using the command above, an admin can silently install the Oracle Journals extension using the following command:

```
svlaunch.exe /i  
C:\Oracle\SmartView\extensions\SVFMJournalInstaller.svext
```

After installation, the extension files are located on the user's machine here:

```
%APPDATA%\Oracle\SmartView\extensions\Bin
```

Downloading Help for Local or Web Server Installation

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 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 the current Smart View release.

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

- [Installing and Configuring Help Locally or on a Web Server](#) in this guide.
- *Oracle Smart View for Office Accessibility Guide* . See "Installing and Configuring Help Locally."

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. Click **Product or Family (Advanced)**, then do the following:
 - a. In the **Product is** field, type `Smart View`.
 - b. In the **Release is** field, select the release from the drop-down list.
4. Click **Search**.
5. Download the online help patch zip file to a temporary directory.
6. To install and configure the help according to your requirements, follow the instructions in either of the following guides:
 - [Installing and Configuring Help Locally or on a Web Server](#) in this guide.
 - *Oracle Smart View for Office Accessibility Guide* . See "Installing and Configuring Help Locally."

Uninstalling Smart View

This topic describes uninstalling Oracle Smart View for Office.

 **Note:**

On Windows 10, non-admin users are not authorized to install Smart View in the C:\Program Files or C:\Program Files (x86) folders. If a non-admin user has installed in one of those folders, or any folder with spaces in the name, the SmartView folder will be left in the <installation location>\Oracle\ folder, and the properties.xml and SVCRecentlyUsedItems.info files will be left in the C:\Users\<user>\AppData\Roaming\Oracle\SmartView folder. These files will need to be deleted manually. Or, an administrator can run a silent uninstall, which will remove all files.

To uninstall extensions, see [Uninstalling Extensions](#) in the *Oracle Smart View for Office User's Guide* .

To uninstall Smart View:

1. Before you begin, close all Office applications.
2. In your Windows system **Control Panel**, click **Programs and Features**.
3. Locate and select the version of Smart View that applies to your installation:
 - **Oracle Smart View 32-bit for Office**
 - **Oracle Smart View 64-bit for Office**
4. Click **Uninstall**.

3

Administering Extension Installations and Updates

Related Topics

- [About Extension Installations and Updates](#)
- [Configuring Manual Extension Updates](#)
- [Configuring Auto-Update Extensions](#)
- [Administering Extensions When Using Mozilla Firefox](#)

About Extension Installations and Updates

The extension installation and update process described in this chapter enables Oracle Smart View for Office end users to install, update, or uninstall extensions based on parameters set by the Smart View administrator in the manifest file, `UpdateList.xml`.

Auto-Update versus Manual Update

In releases earlier than Smart View 11.1.2.5.400, extensions were updated using the *Auto-Update* process. To update extensions with Auto-Update, Smart View end users could go to the **Extensions** tab of the **Options** dialog box and click the **Check for updates** link or select the **Check for updates when Microsoft Office starts** check box to initiate extension updates. For all extensions, if any updates were available, they were retrieved and installations were automatically initiated.

In release 11.1.2.5.400 and later, you can customize the extension update process so that Smart View end users can control when they install, update, and remove extensions. The Smart View administrator configures attributes in the `UpdateList.xml` manifest file to control the options available to the users. If the administrator does not configure these attributes in `UpdateList.xml`, extensions will continue to be updated using the existing Auto-Update process.

Types of Extensions

There are two types of extensions that can be installed on a Smart View client machine:

- **Provider extensions.** Extensions that are dependent on, or integrated with, Oracle components are *provider* extensions. Examples are the Disclosure Management and Oracle Hyperion Financial Reporting extensions. Provider extensions can be configured as required extensions.
- **Per-user extensions.** Extensions that are installed in the user's application data folder. These extensions may or may not be dependent on Oracle components. Additionally, per-user extensions can also be configured as required extensions.

The Smart View administrator configures the `UpdateList.xml` file to specify the list of provider and per-user extensions available to end users along with options for installing, updating, and removing them. Additionally, per-user extensions can also be configured to

display an indicator for required extensions and does not force the installation. The Smart View end user then accesses the **Options** dialog box and installs, updates, or uninstalls the extensions that are available to him or her in the **Extensions** tab.

To configure provider and per-user extension installation, uninstallation, and updating, complete the procedure in [Configuring Manual Extension Updates](#).

If you do not want to make changes to the extension update process, you may refer to [Configuring Auto-Update Extensions](#) for information on the structure of the XML and examples, but you do not need to take any further action.

For instructions on installing, updating, and removing extensions in Smart View, end users can refer to the procedure topics in "Extensions" in the "Smart View Options" chapter in the *Oracle Smart View for Office User's Guide*.

About the Oracle Journals for Financial Management Extension

The Oracle Journals extension is unique among Smart View extensions in that the extension installer file is included in the `extensions` folder of the Smart View installation. End users can install the Oracle Journals extension directly from the `extensions` folder of their Smart View installation.

Or, as administrator, you can control how your Smart View end users install the Oracle Journals extension, automatically or manually, via the **Extensions** page of the Smart View **Options** dialog box.

If you choose to set up automatic or manual installations of the Oracle Journals extension, you should install Smart View in a test environment first, then refer to the `UpdateList.xml` file, found in the `extensions` folder of your Smart View installation. Use the entry in this file as a guideline for the Oracle Journals entry you will add to the `UpdateList.xml` file, as described in [Configuring Manual Extension Updates](#).

Configuring Manual Extension Updates

Auto-Update extensions in the `UpdateList.xml` manifest file can be configured so that the Oracle Smart View for Office end user can see the available extensions, including per-user extensions, and install them from the **Extensions** tab of the **Options** dialog box.

You can add two attributes, `visible` and `allowUninstall`, to the `UpdateList.xml` manifest file to change the behavior of the extensions from auto-update to manual update so that the extensions are displayed in the **Options** dialog box:

- **visible** —A value of "1" indicates that the extension will appear in the **Extensions** tab of the Smart View **Options** dialog and will NOT be part of the Auto-Update process.

If the `visible` attribute is missing or the value is not "1", the extension is included in the Auto-Update process.

- **allowUninstall** —A value of "1" indicates that the user can initiate an uninstall through the **Extensions** tab of the **Options** dialog box using the **Remove** link.

If the `allowUninstall` attribute is missing or the value is not "1", the user may not initiate an uninstall in the **Extensions** interface (the **Remove** link will not be there).

This procedure is optional. If you choose not to add the attributes to `UpdateList.xml`, extensions will continue to be updated as they were in releases earlier than

11.1.2.5.400. In pre-11.1.2.5.400 releases, users click the **Check for updates** link or select the **Check for updates when Microsoft Office starts** check box to initiate extension updates.

See [Manual Update XML Defined](#) and [Manual Update XML Example](#) for reference.

To add attributes to the `UpdateList.xml` manifest file for extensions:

1. Open the `UpdateList.xml` file for editing.

The manifest file is found in two locations:

- `epmstatic:`

```
http://server:port/epmstatic/smartview/Client/UpdateList.xml
```

- The location pointed to by the `<extensionupdatelist>` tag in `C:\Oracle\SmartView\cfg\properties.xml`.

To populate the `<extensionupdatelist>` tag, you can either perform a command line installation, as described in [Running Command Line or Silent Installations](#), or manually update the tag in the `properties.xml` file.

Note:

In `properties.xml`, if multiple URLs exist for an extension installer, Smart View checks all locations and installs from the location containing the latest version.


If multiple URLs exist for the same version of an extension installer, Smart View installs from the first URL in the list.


2. **Optional:** To display an extension in the **Extensions** tab of the **Options** dialog box, and exclude the extension from the Auto-Update process, add the `visible="1"` attribute to the XML for the extension; for example:

```
<update>
  version="11.1.2.3.500.021"
  extension id="Some.Unique.Id.That.Matches.Extension.Descriptor.Id"
  location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi"
  visible="1"
  allowUninstall="1">Oracle Disclosure Management
</extension>
```

[Figure 1](#) shows an example of an extension displayed in the **Extensions** tab.

Figure 3-1 Extension as Displayed in the Extensions Tab

| | | |
|--|--------------|---|
| Oracle Predictive Planning | 11.1.2.4.000 | <input checked="" type="checkbox"/> Enabled |
| Oracle Predictive Planning Smart View Extension | | |
|  Update Available | | |

3. **Optional:** To display the **Remove** button,  **Remove**, for an extension, add the `allowUninstall="1"` attribute to the XML for the extension; for example:

```
<update>
  version="11.1.2.3.500.021"
  extension id="A.Unique.Id.That.Matches.Extension.Descriptor.Id"
  location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi"
  visible="1"
  allowUninstall="1">Oracle Disclosure Management
</extension>
```

Figure 2 shows an example of an extension displayed in the **Extensions** tab.

Figure 3-2 Extension as Displayed in the Extensions Tab



4. For each provider and per-user extension, repeat step 2 and step 3 according to your requirements.
5. **Optional:** To remove a single extension from the list of extensions available for Auto-Update in the `UpdateList.xml` file, use the alternative method of commenting out the extension with the `<!--` and `-->` characters; for example:

```

                                <!--
<extension>
location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi"
version="11.1.2.4.078" id="nnnnnnnnn-nnnn-nnnn-nnnn-nnnnnnnnnnnnn"
Oracle Disclosure Management
</extension>
-->
```

You can also comment out the entire list of extensions if your goal is to exclude all extensions from the manual update process.

Manual Update XML Defined

- `<update>`
The root node. This is a tag.
- `<extension>`
Parent node for `<extension>` attributes. This is a tag.
Attributes of `<extension>` are:
 - `id`
The extension identifier. The identifier must match the `SVExtensionDescriptor.GUID` defined in the extension. It does not need to be

a GUID, it only needs to be unique. This name will appear in the Windows Registry. For this reason, Oracle recommends using readable identifiers; for example, Oracle.Disclosure.Management.

– format

A value of "1" indicates that the entry for the extension uses the manual update XML format introduced in Oracle Smart View for Office 11.1.2.5.400. This XML format supports more user interface features than the standard Auto-Update format.

– version

The version number of the extension. The version number must match exactly with the extension descriptor version in the extension assembly.

– svVersion

The Smart View version that the extension works with.

– visible

Set this value to "1" to display the extension in the **Extensions** tab of the **Options** dialog box. When this is set to "1", the extension will NOT be part of the Auto-Update process.

– manualUpdate

Set this value to "1" if the user needs to close Excel for installation update. The update installer file will be downloaded and a message will be displayed indicating the required restart of Office. Also, the download folder will be opened.

– manualInstall

Set this value to "1" if the user needs to close Excel for installation. The installer file will be downloaded and a message will be displayed indicating the required restart of Office. The download folder will be opened.

– allowUninstall

Set this value to "1" to display the **Remove** button in the **Extensions** tab of the **Options** dialog box.

– type

The type of extension. Valid values are:

- * 0 = optional extension
- * 1 = provider extension
- * 2 = Smart View client

– required

Set to display a "Required" or "Recommended" icon for the extension. No action is done other than the visible icon.

• <name>

The name of the extension. This is a tag.

• <desc>

The extension description. This is a tag.

Uses the "default" attribute. The default description for the extension will be the description displayed in the **Extensions** tab.

• owner

The creator or owner of the extension; for example, Oracle.

- location

The location and file name of the extension installer file. This can be `msi` or `svext`; `exe` is not supported.

- <uninstallMsg>

Optional. For uninstalls, displays a custom message to the user.

Uses the "default" attribute. The default description for the `uninstallMsg` will be the custom message displayed during uninstall.

- <options>

Optional. For `msi` installations only. All options for the Microsoft Windows Installer Tool, `Msiexec.exe`, are supported.

Manual Update XML Example

```
<update>
<extension id="Oracle.SmartView.ExtensionSamples.PowerPack.AdjustData"
  format="1"
  version="1.1.3.0"
  svVersion="11.1.2.2.310"
  visible="1" allowUninstall="1"
  manualUpdate="0"
  manualInstall="0"
  type="0"
  required="1">
  <name>Adjust Data</name>
  <desc default="Simple data adjustment panel for use with Smart View">
  <owner>Oracle</owner>
  <location>file://server_name/shared/ExtensionInstallers/
AdjustDataInstaller.svext
  </location>
  <uninstallMsg default="This will remove the extension and all its
components"
  </uninstallMsg>
</extension>
</update>
```

Configuring Auto-Update Extensions

You can add the `visible` and `allowUninstall` attributes to the `UpdateList.xml` manifest file to change the behavior of the extensions that are part of the Auto-Update process.

If you do not add the attributes to `UpdateList.xml`, extensions will continue to be updated using the existing Auto-Update process.

To add the `visible` and `allowUninstall` attributes to the Auto-Update extensions, complete the procedure in [Configuring Manual Extension Updates](#).

See [Auto-Update XML Defined](#) and [Auto-Update XML Example](#) for reference.

You can also remove an single extension from the list of extensions available for Auto-Update in the `UpdateList.xml` file by commenting out the extension using the `<!--` and `-->` characters. For example:

```
<!--  
<extension>  
location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi"  
version="11.1.2.4.078" id="nnnnnnnn-nnnn-nnnn-nnnn-nnnnnnnnnnn"> Oracle  
Disclosure Management  
</extension>  
-->
```

If you comment out the entire list of extensions, then all extensions are excluded from the manual update process.

Auto-Update XML Defined

- `<update>`

The root node. This is a tag.

- `<extension>`

Text that contains the extension name. This is a tag. The extension name appears in the **Extensions** tab of the **Options** dialog box. Examples of extension names are Oracle Predictive Planning Extension, Disclosure Management, or Adjust Data.

Attributes of `<extension>` are:

- `id`

The extension identifier. The identifier must match the `SVExtensionDescriptor.GUID` defined in the extension. It does not need to be a GUID, it only needs to be unique. This name will appear in the Windows Registry. For this reason, Oracle recommends using readable identifiers; for example, `Oracle.Disclosure.Management`.

- `version`

The version number of the extension.

- `location`

The location and file name of the extension installer file. This can be `msi` or `svext`; `exe` is not supported.

- `operation`

Optional. For Auto-Updates, set this value to "delete" to have the uninstall automatically begin when the user opens Office.

 **Note:**

The first time a user opens Office, if Oracle Smart View for Office determines that the extension needs to be uninstalled, the subsequent opening of Office initiates the uninstall process.

- `options`

Optional. For `msi` installations only. All options for the Microsoft Windows Installer Tool, `Msiexec.exe`, are supported.

– visible

Set this value to "1" to display the extension in the **Extensions** tab of the **Options** dialog box. When this is set to "1", the extension will NOT be part of the Auto-Update process.

– allowUninstall

Set this value to "1" to display the **Remove** button in the **Extensions** tab of the **Options** dialog box.

Auto-Update XML Example

```
<update>
<extension id="A.Unique.Id.That.Matches.Extension.Descriptor.Id"
  version="11.1.2.3.500.021"
  location="/epmstatic/disclosure_mgmt/svext/DiscManSetup.msi"
  visible="1"
  allowUninstall="1">Disclosure Management
</extension>

<extension id="Another.Unique.Id"
  version="11.1.2.3.300"
  location="/epmstatic/SomeSetup.msi"
  operation="delete">Crystal Ball EPM
</extension>

<extension id="And.Another.Unique.Id"
  version="11.1.2.3.300"
  location="/epmstatic/SomeSetup.msi"
  options="/promptrestart">Oracle Predictive Planning"
</extension>
</update>
```

Administering Extensions When Using Mozilla Firefox

When using Mozilla Firefox, keep in mind the following:

- Firefox prevents executable files from being copied and installed from the Internet. This results in a failure while attempting to install an `.SVEXT` extension package with Firefox by selecting the **Open with** option. As a result, when prompted to save or run the file, select the **Save** option, and then double-click the downloaded file to install the extension .
- When using Firefox as your web browser to launch Oracle Smart View for Office, and Firefox opens a browser tab in with an unresolved URL of `oraclesv:\\`, enable the extension for Smart View from the Extensions tab of Firefox Add-ons Manager and restart Firefox.

4

Accessing Shared Connections from an XML File

Related Topics

- [About Accessing Shared Connections from an XML File](#)
- [Setting Up the Shared Connections XML File](#)
- [Connection File Syntax and Example](#)

About Accessing Shared Connections from an XML File

You can use private connection information stored in an XML file to connect to supported Oracle Smart View for Office providers, both cloud and on-premises, using a shared connection. You can add entries for:

- Oracle Enterprise Performance Management Cloud data sources, including Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, and Narrative Reporting
- Oracle Enterprise Performance Management System data sources, including Oracle Hyperion Provider Services (Oracle Essbase), Oracle Hyperion Planning, Oracle Hyperion Financial Management, Oracle Hyperion Reporting and Analysis, Oracle Hyperion Strategic Finance
- Oracle Analytics Cloud - Essbase
- Oracle Business Intelligence Enterprise Edition and Oracle Analytics Cloud

The XML file can exist either locally on each individual Smart View client machine or on a web server. Smart View end users point to this XML file in the **Shared Connections URL** field of the **Options** dialog box, and then access the available providers as they would any other shared connection to which they have access.

To connect to an Oracle BI EE or Oracle Analytics Cloud provider from the Shared Connections Panel in Smart View, you *must* follow the procedures in this topic. However, you may also connect to Oracle BI EE or Oracle Analytics Cloud data sources from the Private Connections Panel using the procedures in [Creating Private Connections](#) in the *Oracle Smart View for Office User's Guide* .

Note:

Only ASCII characters are supported in the XML file. Do not use non-ASCII characters in any of the entries you make in this file.

 **Caution:**

The procedures in this chapter should be completed by the Smart View administrator.

Setting Up the Shared Connections XML File

Setting up the shared connections XML file involves preparing the XML file distributing it to your users.

To set up shared connections in an XML file:

1. Create an empty XML file using any text editor and save it on your Oracle Smart View for Office client machine.

Give the file a meaningful name, such as `SmartViewProviders.xml`, and ensure that it has the `.xml` extension.

 **Note:**

Only ASCII characters are supported in the XML file. Do not use non-ASCII characters in any of the entries you make in this file.

2. Add the following line to the beginning of the file:

```
<?xml version="1.0" encoding="UTF-8"?>
```

3. Next, add the opening `res_GetProvisionedDataSources` tag:

```
<res_GetProvisionedDataSources>
```

4. Add entries for the applicable providers.

The XML can contain entries for supported Oracle Enterprise Performance Management Cloud and Oracle Analytics Cloud data sources, and supported Oracle Enterprise Performance Management System and Oracle Business Intelligence Enterprise Edition data sources.

 **Note:**

Entries for each connection use the private connection format.

When you create your entries, copy the syntax exactly and make ONLY these substitutions:

- In the `Product` tag, `name` attribute:
name —An internal identifier for the provider. This will not display to users.
- In the `Product` tag, `displayVersion` attribute:

version —The version number of the specified provider. This will not display to users.

- In the `Server` tag, `name` attribute:

name —The application name the user will see in the Shared Connection drop-down list.

 **Note:**

This property does not apply to Essbase. The name that appears in the drop-down list will always be Oracle® Essbase.

- In the `Server` tag, `context` attribute:

serviceURL —The URL for a cloud data source connection.

webServerHost —The web server host machine name for an on-premises data source connection.

webServerPort —The web server port number for an on-premises data source connection. Use the default port number that is already noted in the syntax for each provider. Or, if you have configured your system using non-default port numbers, provide them.

The syntax for each provider type is below.

Planning in EPM Cloud

```
<Product id="HP" name="name" displayVersion="version">
<Server name="Planning" context="https://serviceURL/HyperionPlanning/SmartView"></Server>
</Product>
```

Planning Modules in EPM Cloud

```
<Product id="HP" name="name" displayVersion="version">
<Server name="Planning Modules" context="https://serviceURL/HyperionPlanning/SmartView"></Server>
</Product>
```

Financial Consolidation and Close in EPM Cloud

```
<Product id="HP" name="name" displayVersion="version">
<Server name="Financial Consolidation and Close" context="https://serviceURL/HyperionPlanning/SmartView"></Server>
</Product>
```

Tax Reporting in EPM Cloud

```
<Product id="HP" name="name" displayVersion="version">
<Server name="Tax Reporting" context="https://serviceURL/HyperionPlanning/SmartView"></Server>
</Product>
```

Narrative Reporting in EPM Cloud

```
<Product id="EPRCS" name="name" displayVersion="version">  
<Server name="Narrative Reporting" context="https://serviceURL/epm/  
SmartView"> </Server>  
</Product>
```

Reporting Settings in EPM Cloud)

```
<Product id="RAFramework" name="name" displayVersion="version">  
<Server name="Reporting Settings" context="https://serviceURL/hr/  
modules/com/hyperion/reporting/web/repository/HRRepositoryXML.jsp
```

Oracle Analytics Cloud

```
<Product providerType="ExtensionProvider" id="27EE9B0D-D5F5-42c9-  
AFC5-44FEA770C693" name="name" displayVersion="version">  
<Server name="Oracle Analytics Cloud" context="OBI:https://  
serviceURL/analytics/jbips"></Server>  
</Product>
```

Oracle Analytics Cloud - Essbase or other cloud version of Essbase

```
<Product id="APS" name="name" displayVersion="version">  
<Server name="Oracle® Essbase" context="https://serviceURL/essbase/  
smartview"></Server>  
</Product>
```

Oracle Hyperion Provider Services (for on-premises Oracle Essbase)

```
<Product id="APS" name="name" displayVersion="version">  
<Server name="Oracle® Essbase" context="http(s)://  
webServerHost:webServerPort/aps/SmartView"></Server>  
</Product>
```

Oracle Hyperion Planning

```
<Product id="HP" name="name" displayVersion="version">  
<Server name="Oracle Hyperion Planning, Fusion Edition"  
context="http(s)://webServerHost:webServerPort/HyperionPlanning/  
SmartView"></Server>  
</Product>
```

Oracle Hyperion Financial Management

```
<Product id="HFM" name="name" displayVersion="version">  
<Server name="Oracle Hyperion Financial Management, Fusion Edition"  
context="http(s)://webServerHost:webServerPort/hfmadf/.../  
hfmofficeprovider/HFMOfficeProvider.aspx"></Server>  
</Product>
```

Oracle Hyperion Reporting and Analysis Framework, Reporting Settings (for on-premises Release 11.1.2.4.9xx and later)

```
<Product id="RAFramework" name="name" displayVersion="version">
<Server name="Reporting and Analysis Framework" context="http(s)://
webServerHost:webServerPort/hr/modules/com/hyperion/reporting/web/
repository/HRRepositoryXML.jsp
```

Oracle Hyperion Reporting and Analysis (for on-premises Release 11.1.2.4.7xx and earlier)

```
<Product id="RAFramework" name="name" displayVersion="version">
<Server name="Reporting and Analysis Framework" context="http(s)://
webServerHost:webServerPort/raframework/browse/listXML"></Server>
</Product>
```

Oracle Hyperion Strategic Finance

```
<Product providerType="ExtensionProvider" id="HSF" name="name"
displayVersion="version">
<Server name="Oracle Hyperion Strategic Planning, Fusion Edition"
context="http(s)://webServerHost:webServerPort/StrategicPlanning/
SmartView"></Server>
</Product>
```

Oracle BI EE

```
<Product providerType="ExtensionProvider" id="27EE9B0D-D5F5-42c9-
AFC5-44FEA770C693" name="name" displayVersion="version">
<Server name="Oracle BI, Fusion Edition" context="OBI:http(s)://
webServerHost:webServerPort/analytics/jbips"></Server>
</Product>
```

5. **Optional:** If you are planning to access help locally or from an internal URL, add an entry for locating the help:

- Help installed on a local drive:

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

For example:

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

- Help installed on a web server:

```
<helpurlcontext>http://webServerHost:webServerPort/pathToHelpFiles/
smartview_help/</helpurlcontext>
```

For example:

```
<helpurlcontext>http://abcxyzco.com:12345/user_documentation/  
smartview_help/</helpurlcontext>
```

Notes:

- Perform this step **ONLY** if you are planning to access shared connections from an XML file **AND** are required to access help either from a local drive or a web server within your organization. See [Installing and Configuring Help Locally or on a Web Server](#) for instructions on setting up help.
- If you use the `<helpurlcontext>` tag, the help location you specify overrides the default or modified location specified in the `<helpurlcontext>` tag in the `properties.xml` file, as described in [Optional Local Help Configuration via the Shared Connections XML File](#).

6. Optional: Add an entry for the User Productivity Kit (UPK):

```
<UPK>http://link to User Productivity Kit</UPK>
```

For example:

```
<UPK>http://download.abcxyzco.com/ocomdocs/PlayerPackage/data/  
toc.html</UPK>
```

7. Add the closing `res_GetProvisionedDataSources` tag to complete the file, then save it.

```
</res_GetProvisionedDataSources>
```

See [Connection File Syntax and Example](#) for the full syntax and an example of how this file should be set up.

8. Test the file:

a. Perform an action:

- If you plan to have users copy the XML file to their local drive, ensure that the file is copied to a local drive on your Smart View client machine.
For example, the file may be copied to the `SmartView\bin` directory.
- Alternatively, if you plan to copy the file to a web server, ensure that the file is accessible to your users from a fully-qualified URL that includes the XML file name and the `.xml` extension.

b. Start Smart View and in the **Options dialog box, edit the **Shared Connections URL** to add the full path to the file or a URL, ensuring that the `.xml` file name extension is included.**

 **Note:**

This feature will not work if the `.xml` file name extension is not included at the end of the local drive path or URL.

- Local drive example:

```
C:/Oracle/SmartView/bin/SmartViewProviders.xml
```

Ensure that you use forward slashes (/) as separators in the file path.

The directory path and file should now be available in the list of shared connections.

- Web server URL syntax:

```
http://webServerHost:webServerPort/pathToFile/filename.xml
```

Web server URL example:

```
http://abcxyzcowebserver:1234/SmartViewDataSources/  
SmartViewProviders.xml
```

The URL should now be available in the list of shared connections.

- c. Connect to the file using the **Shared Connections** option in the Smart View Panel, as described in "Connecting to Data Sources" in the *Oracle Smart View for Office User's Guide*.

If you do not see provider entries listed in the **Shared Connections** drop-down list, then the XML file may contain incorrect syntax or invalid characters.

 **Tip:**

Verify the XML by opening the file in a browser; for example, in Microsoft Edge. The browser will specify the invalid syntax. Correct any errors in the XML file editor, save, and refresh the browser display.

9. When the XML file is correct and complete, perform one of the following procedures:

- If you plan to have users copy the XML file to their local drive, distribute the file to your Smart View users with these instructions:

- a. Do not modify this file in any way.
- b. Copy the file to a local drive on your Smart View client machine.

For example, the file may be copied to the `SmartView\bin` folder.

- c. Start Smart View and in the **Options** dialog box, edit the **Shared Connections URL** with the full path to the file on the local drive, including the file name and `.xml` extension; for example:

```
C:/Oracle/SmartView/bin/SmartViewProviders.xml
```

Ensure that you use forward slashes (/) as separators in the file path.

The directory path and file is now available in the list of shared connections.

- d. Test by connecting to the file using the Shared Connections option in the Smart View Panel, as described in "Connecting to Data Sources" in the *Oracle Smart View for Office User's Guide* .

If you have problems connecting, contact your Smart View administrator.

- If you plan to copy the XML file to a web server, notify your Smart View users with these instructions:

- a. Start Smart View and in the **Options** dialog box, edit the **Shared Connections URL** with the URL provided, including the file name and `.xml` extension; for example:

```
http://abcxyzcowebserver:1234/SmartViewDataSources/  
SmartViewProviders.xml
```

- b. Test by connecting to this URL using the Shared Connections option in the Smart View Panel, as described in "Connecting to Data Sources" in the *Oracle Smart View for Office User's Guide* .

If you have problems connecting, contact your Smart View administrator.

- c. **Internet Explorer users:** To use the URL given in step a, Oracle recommends setting the following options in Internet Explorer:
 - i. Select **Tools**, then **Internet Options**.
 - ii. In the **General** tab, **Browsing history** group, select **Settings**.
 - iii. In the **Check for newer versions of stored pages** section, select **Every time I visit the webpage**, and then click **OK**.
 - iv. In the **Internet Options** dialog box, select the **Advanced** tab.
 - v. In the **Security** section, select the **Empty Temporary Internet Files folder when browser is closed** option.
 - vi. Click **OK** to close **Internet Options** and restart the browser.

 **Note:**

Starting with EPM System Release 11.2.2 and the EPM Cloud 20.09 update, Internet Explorer is no longer supported. This step is kept here for the purpose of backward compatibility.

Connection File Syntax and Example

Related Topics

- [Connection File Syntax](#)
- [Connection File Example](#)

Connection File Syntax

Below is the file syntax in its entirety:

```
<?xml version="1.0" encoding="UTF-8"?>
<res_GetProvisionedDataSources>

<Product id="APS" name="name" displayVersion="version">
<Server name="Oracle Hyperion Provider Services" context="http://
webServerHost:webServerPort/aps/SmartView"></Server>
</Product>

<Product id="HP" name="name" displayVersion="version">
<Server name="Oracle Hyperion Planning, Fusion Edition" context="http://
webServerHost:webServerPort/HyperionPlanning/SmartView"></Server>
</Product>

<Product id="HFM" name="name" displayVersion="version">
<Server name="Oracle Hyperion Financial Management, Fusion Edition"
context="http://webServerHost:webServerPort/hfmadf/./hfmofficeprovider/
HFMOfficeProvider.aspx"></Server>
</Product>

<!-- For on-premises Release 11.1.2.4.9xx and later -->
<Product id="RAFramework" name="name" displayVersion="version">
<Server name="Reporting Settings" context="http://
webServerHost:webServerPort/hr/modules/com/hyperion/reporting/web/repository/
HRRepositoryXML"></Server>
</Product>

<!-- For on-premises Release 11.1.2.4.7xx and earlier -->
<Product id="RAFramework" name="name" displayVersion="version">
<Server name="Reporting and Analysis Framework" context="http://
webServerHost:webServerPort/raframework/browse/listXML"></Server>
</Product>

<!-- For EPM Cloud -->
<Product id="RAFramework" name="name" displayVersion="version">
<Server name="Reporting Settings" context="https://serviceURL/hr/modules/com/
hyperion/reporting/web/repository/HRRepositoryXML"></Server>
</Product>

<Product providerType="ExtensionProvider" id="name" name="HSF-11.1.2"
displayVersion="version">
<Server name="Oracle Hyperion Strategic Planning, Fusion Edition"
context="http(s)://webServerHost:webServerPort/StrategicPlanning/
SmartView"></Server>
</Product>

<Product providerType="ExtensionProvider" id="27EE9B0D-D5F5-42c9-
AFC5-44FEA770C693" name="name" displayVersion="version">
<Server name="Oracle BI, Fusion Edition" context="OBI:http://
webServerHost:webServerPort/analytics/jbips"></Server>
```

```

</Product>

<Product id="HP" name="name" displayVersion="version">
<Server name="Planning" context="https://serviceURL/HyperionPlanning/
SmartView"></Server>
</Product>

<Product id="HP" name="name" displayVersion="version">
<Server name="Planning Modules" context="https://serviceURL/
HyperionPlanning/SmartView"></Server>
</Product>

<Product id="EPRCS" name="name" displayVersion="version">
<Server name="Narrative Reporting" context="https://serviceURL/epm/
SmartView"></Server>
</Product>

<Product id="HP" name="name" displayVersion="version">
<Server name="Financial Consolidation and Close" context="https://
serviceURL/HyperionPlanning/SmartView"></Server>
</Product>

<Product id="HP" name="name" displayVersion="version">
<Server name="Tax Reporting" context="https://serviceURL/
HyperionPlanning/SmartView"></Server>
</Product>

<Product providerType="ExtensionProvider" id="27EE9B0D-D5F5-42c9-
AFC5-44FEA770C693" name="name" displayVersion="version">
<Server name="Oracle Analytics Cloud" context="OBI:https://serviceURL/
analytics/jbips"></Server>
</Product>

<Product id="APS" name="name" displayVersion="version">
<Server name="Oracle Analytics Cloud - Essbase" context="https://
serviceURL/essbase/smartview"></Server>
</Product>

<helpurlcontext>a valid entry as per optional step 5</helpurlcontext>

<UPK>http://link to User Productivity Kit</UPK>

</res_GetProvisionedDataSources>

```

Connection File Example

The following example includes an entry for each provider type and also includes an entry for accessing help from an organization's internal web server:

```

<?xml version="1.0" encoding="UTF-8"?>
<res_GetProvisionedDataSources>

<Product id="APS" name="APS-11.1.2" displayVersion="11.1.2.4.500">
<Server name="Oracle Hyperion Provider Services" context="http(s)://"

```

```
<webServerHost>:19000/aps/SmartView"></Server>
</Product>

<Product id="HP" name="HP-11.2" displayVersion="11.2.5">
<Server name="Oracle Hyperion Planning, Fusion Edition" context="http(s)://
<webServerHost>:19000/HyperionPlanning/SmartView"></Server>
</Product>

<Product id="HFM" name="HFM-11.2" displayVersion="11.2.5">
<Server name="Oracle Hyperion Financial Management, Fusion Edition"
context="http(s)://<webServerHost>:19000/hfmadf/./hfmofficeprovider/
HFMOfficeProvider.aspx"></Server>
</Product>

<!-- For on-premises Release 11.1.2.4.9xx and later -->
<Product id="RAFramework" name="RAFramework-11.1.2.4"
displayVersion="11.1.2.4.9xx">
<Server name="Reporting Settings" context="http(s)://
<webServerHost>:<<webServerPort>/hr/modules/com/hyperion/reporting/web/
repository/HRRepositoryXML"></Server>
</Product>

<!-- For on-premises Release 11.1.2.4.7xx and earlier -->
<Product id="RAFramework" name="RAFramework-11.1.2.4.7"
displayVersion="11.1.2.4.7xx">
<Server name="Reporting and Analysis Framework" context="http(s)://
<webServerHost>:<webServerPort>/raframework/browse/listXML"></Server>
</Product>

<!-- For EPM Cloud -->
<Product id="RAFramework" name="RAFramework-21.05" displayVersion="21.05">
<Server name="Reporting Settings" context="http://<serviceURL>/hr/
modules/com/hyperion/reporting/web/repository/HRRepositoryXML"></Server>
</Product>

<Product providerType="ExtensionProvider" id="HSF" name="HSF-11.1.2"
displayVersion="11.1.2.2.00.2266">
<Server name="Oracle Hyperion Strategic Planning, Fusion Edition"
context="http(s)://<webServerHost>:8900/StrategicPlanning/SmartView"></
Server>
</Product>

<Product providerType="ExtensionProvider" id="27EE9B0D-D5F5-42c9-
AFC5-44FEA770C693" name="OBI EE-11.1.1.7" displayVersion="11.1.1.7">
<Server name="Oracle BI, Fusion Edition" context="OBI:http(s)://
<webServerHost>:9704/analytics/jbips"></Server>
</Product>

<Product id="HP" name="PBCS" displayVersion="21.05">
<Server name="Planning" context="https://<serviceURL>/HyperionPlanning/
SmartView"></Server>
</Product>

<Product id="HP" name="EPBCS" displayVersion="21.05">
<Server name="Planning Modules" context="https://<serviceURL>/
```

```
HyperionPlanning/SmartView"></Server>
</Product>

<Product id="EPRCS" name="NR" displayVersion="21.05">
<Server name="Narrative Reporting" context="https://<serviceURL>/epm/
SmartView"></Server>
</Product>

<Product id="HP" name="FCCS" displayVersion="21.05">
<Server name="Financial Consolidation and Close" context="https://
<serviceURL>/HyperionPlanning/SmartView"></Server>
</Product>

<Product id="HP" name="TRCS" displayVersion="21.05">
<Server name="Tax Reporting" context="https://<serviceURL>/
HyperionPlanning/SmartView"></Server>
</Product>

<Product providerType="ExtensionProvider" id="27EE9B0D-D5F5-42c9-
AFC5-44FEA770C693" name="OAC 21.05" displayVersion="21.05">
<Server name="Oracle Analytics Cloud" context="OBI:https://
<serviceURL>/analytics/jbips"></Server>
</Product>

<Product id="APS" name="Essbase" displayVersion="21.05">
<Server name="Oracle Analytics Cloud - Essbase" context="https://
<serviceURL>/essbase/smartview"></Server>
</Product>

<helpurlcontext>http(s)://<webServerHost>:<port>/user_documentation/
smartview_help/</helpurlcontext>

<UPK>http(s)://download.<webServerHost>/ocomdocs/PlayerPackage/data/
toc.html</UPK>

</res_GetProvisionedDataSources>
```

5

Installing and Configuring Help Locally or on a Web Server

Related Topics

- [About Installing Help Locally or on a Web Server](#)
- [Setting Up Help Locally or on a Web Server](#)
- [Optional Local Help Configuration via the Shared Connections XML File](#)

About Installing Help Locally or on a Web Server

After installing Oracle Smart View for Office, the online help is accessed 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 help zip file can be downloaded from My Oracle Support. You unzip the help to a local drive or web server, and then modify the Smart View `properties.xml` file to point the help location.



Note:

Depending on your requirements, you may also want to specify the `<helpurlcontext>` tag in a shared connections XML file, as described in [Setting Up the Shared Connections XML File](#) of [Accessing Shared Connections from an XML File](#). Refer to [Optional Local Help Configuration via the Shared Connections XML File](#) for more information.

Setting Up Help Locally or on a Web Server

To install and configure Oracle Smart View for Office help locally or on a web server:

1. Obtain the help zip file for this release from My Oracle Support.
2. Extract the contents to either a local folder on the computer where Smart View is installed or to a folder accessible by your users on an HTTP web server in your organization.

For example:

- Extract the contents locally to:

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

The extraction adds an additional folder named `smartview_help`. The result is:

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

- Extract the contents to a web server:

```
http://webServerHost:webServerPort/pathToHelpFiles
```

The extraction adds `smartview_help` after `pathToHelpFiles` . The result is:

```
http://webServerHost:webServerPort/pathToHelpFiles/smartview_help
```

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 using the following syntax:
 - If installing locally, provide 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>
```

- If installing on a web server, provide the path to the folder that is parent to the language folders using the following syntax:

```
<helpurlcontext>http://webServerHost:webServerPort/
pathToHelpFiles/smartview_help/</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 and substituting `user_documentation` for `pathToHelpFiles`, after extracting the zip contents to `http://abcxyzco.com:12345/user_documentation`, the `smartview_help` folder is the parent folder of the language folders. For example:

```
<helpurlcontext>http://abcxyzco.com:12345/user_documentation/
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.

Optional Local Help Configuration via the Shared Connections XML File

In a new installation, Oracle Smart View for Office help is available as soon as you start Excel. You do not need to be connected to a Smart View provider in order to view the help. After making the changes to the `properties.xml` file described in this chapter, help is accessed from the help location you indicate.

If you are also planning to access shared connections from an XML file (as described in [Accessing Shared Connections from an XML File](#)), AND you require an alternative location for the help, note the following:

- You can add the `<helpurlcontext>` tag to the shared connections XML file. The help location you specify in the shared connections XML file overrides the help location specified in `properties.xml` once you click the **Shared Connections** button in the Smart View Panel. This is true whether or not you modify the `<helpurlcontext>` tag in `properties.xml`.
- If you do not add or specify the `<helpurlcontext>` tag to the shared connections XML file, then the local help defined in the `properties.xml` file will ALWAYS be used and is available as soon as you start Excel.

6

Tips and Troubleshooting

Related Topics

- [Diagnostics Tools and Health Check](#)
- [Installation and Languages](#)
- [Windows, Office, and Smart View Locale Settings](#)
- [Office .NET Installation Option Requirement](#)
- [Microsoft Office 365 ProPlus Support](#)
- [Installing in Program Files Folder on Windows 10](#)
- [Smart View cfg Folder and Properties File Access Requirement](#)
- [VBA Function Error for Oracle Analytics Cloud or Oracle BI EE](#)
- [Failure Connecting to Oracle Analytics Cloud](#)
- [Ribbons Not Selectable After Installation on Windows 10](#)
- [Ribbon Display Issue After Connecting to Both Smart View and PowerPivot](#)
- [Office Unknown Exception Error on a Protected Sheet](#)
- [Spreading Issue, Smart View Installation, and HsSpread.dll](#)
- [Smart View Ribbon Fails to Display After Non-Admin Installation on Windows 10](#)
- [Smart View Display and Operations Issues After Windows 10 Update](#)
- [Error When First Launching Excel After Installing Smart View](#)
- [Issues When Starting Excel in Automation Mode](#)
- [Diagnosing Login Issues](#)
- [Problem Opening Files in Excel](#)
- [Enabling and Disabling Smart View and Other Office Add-ins](#)
- [Disabling the Smart View Add-on in Apps Other than Excel](#)
- [Errors when Launching Office after Installing Smart View](#)
- [Extension Installation from EPM Cloud and Message Window Focus](#)
- [Extension Updates and Office Applications Remaining Open](#)
- [Slowness with Extension Options Dialog Box](#)
- [Office Slow to Start when Internet Connectivity is Not Available](#)
- [Excel Process Stops Responding \(Hangs\) on Shut Down](#)
- [Add-ins Menu Still Displays After Smart View Uninstall](#)
- [Renaming or Deleting the ExcelInn.xlb File](#)
- [Extension Updates and Outlook](#)
- [Enabling the Smart View Extension for Firefox](#)

- [Uninstallation Process Stops Responding](#)
- [Excel Looks for HsTbar.xla File After Uninstall](#)
- [Connection Error](#)
- [Working with Custom HTML-based Login Forms](#)
- [Drill-through with Chrome: Blocklist and Allowlist for Native Messaging](#)
- [Browser Settings When Working with XML Files on HTTP Server](#)
- [Flickering Issues on Office 2013 and Office 2016](#)
- [Smart View HTTP Session Timeout](#)
- [Duplicate Queries in Word Slow to Refresh](#)
- [Custom Styles and Merged Cells in Forms](#)
- [Fixing Function Links on Machines where Smart View was Reinstalled in a User-specified Location](#)
- [Session Timeout when Connected Using Vanity URLs](#)
- [Memory Error on Large Queries](#)
- [Issues with Dynamic Data Exchange Option in Excel](#)
- [Performance and Memory Usage Considerations for Smart View with Excel](#)
- [Unbalanced Loads in Provider Services Clustered Environments](#)
- [Two-Way SSL and Problematic Certificates](#)

Diagnostics Tools and Health Check

[Diagnostic Tools](#)

[Health Check](#)

Diagnostic Tools

When an issue arises while using Oracle Smart View for Office that you cannot resolve on your own, use the Smart View Diagnostic tools 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.

The Smart View Diagnostic tools are located in the **Diagnostics** group in the Smart View ribbon. You enable the display of the tools by

You can customize certain features of Smart View Diagnostic tools; for example:

- Hide data values in an Office document.
- Hide member names in an Office document.
- Direct the diagnostics output files to a folder other than the default.
- Allow automatic screenshots for each warning or error message that is displayed.

See [Smart View Diagnostics and Health Check](#) in the *Oracle Smart View for Office User's Guide* for more information on the Diagnostics tools.

Health Check

You can perform a "health check" on your system to optimize performance and to get information about your machine, Microsoft Office version, Smart View version, and the extensions you have installed.

You can view the following information about your system:

- Version Information—Operating System, Excel Version, Smart View Version
- Hardware Information—RAM Memory, Processor, Smart View Installed Drive Space
- Excel Add-ins—Depends on the Excel add-ins that are installed
- COM Add-ins—Depends on the COM add-ins that are installed

You can make the following changes to system settings and Smart View options:

- Registry Information
 - KeepAlive Timeout
 - Receive Timeout
 - ServerInfo Timeout
- Smart View Options
 - Undo Buffer
 - Improve Metadata Storage
- Graphic Setting
 - Disable Windows Transitions on Addin Task Panes
 - Disable Animations

For more information, see "Performing a Health Check On Your System" in the *Oracle Smart View for Office User's Guide* .

Installation and Languages

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

Windows, Office, and Smart View Locale Settings

On each Oracle Smart View for Office client machine, the following locale settings should match:

- Smart View language option
- Microsoft Office language
- Windows Regional Settings
- Windows operating system

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, reports or chart data may display incorrectly.

Office .NET Installation Option Requirement

During Microsoft Office installation, you must enable the .NET installation option. When enabled, files are placed in your Office installation that support interoperability between Office and other programs and add-ins, such as Oracle Smart View for Office and Smart View extensions.

Smart View works with these Office interop files:

- `Microsoft.Office.Interop.Excel`
- `Microsoft.Office.Interop.Powerpoint`
- `Microsoft.Office.Interop.Word`
- `Microsoft.Office.Interop.Outlook`

If these files are not installed, Smart View does not behave as expected. For example, when connected to Narrative Reporting, you may see a blank report package panel, resulting in an exception error when clicking in your Office application. Additionally, in the Smart View log file, you will get errors for an Office interop file; for example:

```
System.IO.FileNotFoundException: Could not load file or assembly  
'Microsoft.Office.Interop.PowerPoint  
Could not load file or assembly 'Microsoft.Office.Interop.PowerPoint
```

If you see errors in the Smart View log file such as the one shown above, reinstall Office and ensure that the .NET option is enabled.

Microsoft Office 365 ProPlus Support

A known issue with Microsoft Office 365 ProPlus patch 16.0.10228.20051, updated through the insider slow channel, prevents users from accessing Oracle Smart View for Office with Office 365, resulting in the "Member not found" message being displayed. This Microsoft patch was pushed to users who signed up for monthly channel updates between June 12 and June 14, 2018.

Workaround: Update Office with Microsoft Office 365 Version 1806 (Build 10228.20080), which contains the fix for this issue.

Installing in Program Files Folder on Windows 10

On Windows 10, non-administrator users are not authorized to modify the `Program Files` folder or the `Program Files (x86)`. Therefore, if an administrator installs Oracle Smart View for Office in `Program Files`, a non-admin user will not be able to uninstall Smart View.

By default, Smart View is installed in `C:\Oracle\SmartView`, not in the `Program Files` folder.

Smart View cfg Folder and Properties File Access Requirement

Oracle Smart View for Office requires Write access to the `<Smart View Install>/cfg` folder, `properties.xml` file during runtime. An "Access Denied" error may occur if users do not have permission to write to this folder or file when attempting the following operations:

- Saving a file to EPM Cloud using the Save or Save As commands in the Smart View ribbon
- Performing ad hoc analysis

VBA Function Error for Oracle Analytics Cloud or Oracle BI EE

28791548 -- After uninstalling and reinstalling Oracle Smart View for Office, the following error was displaying when using a VBA function for Oracle Analytics Cloud or Oracle Business Intelligence Enterprise Edition:

```
Error '-2147024894(800700002)': Automation error The system cannot find the file specified.
```

In some cases, when Smart View is installed as administrator, the uninstall and reinstall does not handle registration of the Oracle BI EE extension file correctly.

To remedy this issue, after installation, and before starting Office, install the Oracle BI EE extension manually:

1. After uninstalling and reinstalling Smart View, ensure that all Office applications remain closed.
2. Navigate to `C:\Oracle\SmartView\extensions` and double-click on `JBIPSPProviderInstaller.svext`.
3. In the message that indicates successful installation, click **OK**.

The Oracle BI EE extension installation is complete and you may start Office.

Failure Connecting to Oracle Analytics Cloud

Issue

In some cases, in an Oracle Analytics Cloud production environment, users may have issues connecting to Oracle Analytics Cloud from their Oracle Smart View for Office installation.

This is the type of scenario where this situation can occur:

- Users connect to Oracle Analytics Cloud via VPN
- Oracle Analytics Cloud is protected by Oracle Identity Cloud Service, which is requested through an Internet Proxy
- Oracle Identity Cloud Service is integrated with a federated single-signon system, such as Ping Identity
- Users on two different domains install Smart View via a package, delivered using Microsoft Application Virtualization (Microsoft App-V)

When trying to connect, an empty login screen pops up repeatedly, and then the login finally fails. This can happen when pasting a connection URL in the Private Connection Panel.

Cause

The root cause for this issue is that the Smart View packaged version, prior to login, opened a browser process named `ielowutil.exe`. The non-packaged local install of Smart View, or packaged install with Microsoft Internet Explorer already running, both launched `iexplore.exe` instead.

The `ielowutil.exe` file is a special protected version of Internet Explorer named "Low MIC [Medium Integrity Cookie] Utility." It prevents the sharing of cookie data between processes of differing integrity.

This can explain why login to Oracle Analytics Cloud likely fails – since it requires cookie information that is set by both Oracle Identity Cloud Service and Ping Identity, and continues to assume the user is not logged in – redirecting back to Oracle Identity Cloud Service in a loop that escapes only after 12 times.

Solution

Using Process Monitor (Windows Sysinternals), the registry key used to read the browser was different in each case and was identified as followed:

- **Working Key:**

```
HKEY_CLASSES_ROOT\Wow6432Node\CLSID\{0002DF01-0000-0000-  
C000-000000000046}\(Default)
```

Presents the value:

```
Internet Explorer(Ver 1.0)
```

- **Non-working Key:**

```
HKEY_CLASSES_ROOT\Wow6432Node\CLSID\{0002DF01-0000-0000-  
C000-000000000046}\LocalServer32\ (Default)
```

Presents the value:

```
"%ProgramFiles(x86)%\Internet Explorer\ielowutil.exe" -CLSID:  
{0002DF01-0000-0000-C000-000000000046}
```

The registry key:

```
HKEY_CLASSES_ROOT\Wow6432Node\CLSID\{0002DF01-0000-0000-  
C000-000000000046}\LocalServer32\ (Default)
```

is a pointer to:

```
HKEY_LOCAL_MACHINE\SOFTWARE\Classes\Wow6432Node\CLSID\{0002DF01-0000-0000-  
C000-000000000046}\LocalServer32\ (Default)
```

Changing this key to a new value of:

```
"%ProgramFiles(x86)%\Internet Explorer\iexplore.exe"
```

results in the Smart View package calling `iexplore.exe` instead, and the login succeeding.

All registry checks and changes must be done in the same App-V Package/Version ID environment as the Smart View package, ensuring that the local system is left intact; that is:

```
regedit /appvve:307790F2-DE31-4EBE-B3BC-4C9337032E73_0BE1C6E6-85CC-48C3-A0FF-3BBB789681C3
```

Since users generally do not have admin access, you may roll out the fix to `HKEY_CURRENT_USER` by adding the key to the same path:

```
HKEY_CURRENT_USER\Software\Classes\Wow6432Node\CLSID\{0002DF01-0000-0000-0000-000000000046}\LocalServer32\ (Default)
```

In the case of different Smart View packaged versions (some in an App-V connection group) across different domains, a PowerShell script can be written to identify the Smart View packages and make the correct registry changes.

Testing, this key change should result in Smart View users being able to successfully and consistently log in to Oracle Analytics Cloud.

Ribbons Not Selectable After Installation on Windows 10

On Windows 10, after installing Oracle Smart View for Office and starting Excel for the first time, you are not able to select any other Excel ribbons or the Smart View ribbon, or select any menu items on the default Home ribbon.

Workaround: Click the **X** in the top right corner to close Excel, and then restart Excel. Now you should be able to select the Smart View ribbon and any other Excel ribbon.

Ribbon Display Issue After Connecting to Both Smart View and PowerPivot

If you are connected to Oracle Smart View for Office and Microsoft PowerPivot at the same time, and then close Excel and reopen Excel, both the Smart View and PowerPivot ribbons are missing from Excel.

Workaround: Terminate the Excel process in Windows Task Manager, then reopen Excel.

Office Unknown Exception Error on a Protected Sheet

Upon opening a password-protected worksheet, an exception is thrown as Oracle Smart View for Office tries to set `Range.ID`, required for duplicate (non-unique) member name support. An exception is also thrown by the Excel API on any operation that requires Smart View to write into worksheet if the worksheet is password protected.

Note that Smart View does not work with password-protected worksheets.

If possible, try the following workarounds:

- Remove password protection.

- Rewrite macros in a way that prevents Smart View from trying to write in password-protected worksheets.

Spreading Issue, Smart View Installation, and HsSpread.dll

In some cases, spreading is not working as expected.

Oracle Smart View for Office is not automatically spreading data from the YearTotal or Quarter level down to the months. Data is spread automatically when entering values into forms on the web, but the same functionality is not working in Smart View.

The issue may be due to the dynamic link library, `HsSpread.dll`, not being registered correctly, which can happen when Smart View is installed by a non-admin user.

This issue affects Planning 18.02.67+ and Planning Modules 17.12.54 and later.

To fix this issue, Oracle recommends the following:

- Uninstall Smart View and reinstall as the Windows administrator. See [Reinstall Smart View as Administrator](#).
- If the spreading issue persists after reinstalling Smart View as the administrator, then manually register the `HsSpread.dll` file. See [Register HsSpread.dll](#).

Reinstall Smart View as Administrator

To reinstall Smart View as administrator, perform these steps:

1. Uninstall Smart View.
See [Uninstalling Smart View](#) for more information.
2. Reinstall Smart View by right-clicking `SmartView.exe` and selecting **Run as administrator**.
See [Installing from My Oracle Support or Oracle Technology Network](#) for more information.
3. Launch Excel, open a form or ad hoc grid, and verify that spreading is working.
If the spreading issue persists, complete the steps in [Register HsSpread.dll](#).

Register HsSpread.dll

To register the `HsSpread.dll` with Windows:

1. Start a Windows command prompt as administrator.
2. Switch to the `bin` folder in your Smart View installation.
The default location is `Oracle\SmartView\bin`.
3. Run the following command:

```
C:\Windows\Microsoft.NET\Framework\v4.0.30319\regasm.exe /codebase HsSpread.dll
```
4. In the command prompt, check for any errors in the output.
5. Test the spreading functionality.
If the issue persists, contact Oracle Support.

Smart View Ribbon Fails to Display After Non-Admin Installation on Windows 10

In some cases, installing Oracle Smart View for Office on Windows 10 as a non-admin can cause the Smart View ribbon to fail to display.

In a non-admin install, you double-click the `SmartView.exe` file to launch the installer. In an admin install, you right-click `SmartView.exe` and select **Run as administrator**.

If you installed Smart View as a non-admin and the Smart View ribbon does not display, complete the following procedures to troubleshoot this issue:

[Add the COM Add-in](#)

[Reinstall Smart View as Administrator](#)

Add the COM Add-in

To add the Smart View COM add-in:

1. Go to **File**, then **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**.
4. Restart Excel.

If the Smart View ribbon does not display after restarting Excel, proceed to [Reinstall Smart View as Administrator](#).

Reinstall Smart View as Administrator

If the Smart View ribbon still fails to display after adding the COM add-in, perform these steps:

1. Uninstall Smart View.
See [Uninstalling Smart View](#) for more information.
2. Reinstall Smart View by right-clicking `SmartView.exe` and selecting **Run as administrator**.
See [Installing from My Oracle Support or Oracle Technology Network](#) for more information.
3. Launch Excel and verify that the Smart View ribbon is displayed.

Smart View Display and Operations Issues After Windows 10 Update

After a Windows 10 update on some high-resolution displays, drag-and-drop may not work as expected, some controls may look blurry, and some operations may not work properly. For example, an "Invalid selection" error occurs when trying to drag and drop members from the POV.

To avoid the "Invalid selection" error and other display issues after a Windows update:

1. Select the Windows 10 **Start** button, then **Settings**, then **System**, then **Display**, and then **Advanced scaling settings**.
2. Under **Fix scaling for apps**, set **Let Windows try to fix apps so they are not blurry** to **On**.
3. Restart Excel.

Drag-and-drop and other operations should work as expected, and the display of Oracle Smart View for Office controls should be improved.

Error When First Launching Excel After Installing Smart View

After installing Oracle Smart View for Office 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](#)
 - [COM Add-ins Method](#)
- If the above methods do not resolve the issue, try reinstalling Smart View as administrator.
See [Reinstall Smart View as Administrator](#).

Trust Center Method

1. Perform the task appropriate for your Office version:
 - **365 Windows client, 2019, 2016, 2013, 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 the path to the Smart View bin folder; for example:
`C:\Oracle\SmartView\bin`
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:

- **365 Windows client, 2019, 2016, 2013, 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**.

Issues When Starting Excel in Automation Mode

In some cases, third-party software that automates Excel processes, such as exporting to Excel, may cause issues with Excel and a conflict with Oracle Smart View for Office.

Workaround:

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. To do this, create the Options key and DisableInAutomation key value as follows:

- Key Name:

```
[HKEY_CURRENT_USER\Software\Oracle\SmartView\Options]
```

- Key Value:

```
"DisableInAutomation"=dword:00000001
```

When set to 00000001, Smart View is disabled when Excel is started in automation mode. Smart View starts correctly when Excel is started manually, outside of an automated process.

When set to 0 or not created at all, then Smart View is enabled and starts when Excel is started in automation mode, which may cause issues. Smart View starts correctly when Excel is started manually, outside of an automated process.

Creating the Registry Key and Key Value

To create and update the registry key, Options:

1. Click **Start**, click **Run**, type `regedit` in the **Open** box, and then click **OK**.
2. Locate and then select the following registry subkey:

```
HKEY_CURRENT_USER\Software\Oracle\SmartView\
```
3. From the **Edit** menu, select **New**, and then select **Key**.
4. Type `Options`, and then press **Enter**.
5. From the **Edit** menu, select **New**, and then select **DWORD Value**.
6. Type `DisableInAutomation`, and then press **Enter**.
7. In the **Details** pane, right-click **DisableInAutomation**, and then click **Modify**.
8. In the **Value** data box, type `00000001`, and then click **OK**.

The value, 00000001, enables the **DisableInAutomation** key.

 **Note:**

If a zero value is entered, then this option is disabled.

9. Exit Registry Editor.
10. Restart Excel.

Diagnosing Login Issues

Related Topics

- [Smart View Does not Connect to a Data Source](#)
- [Attempts to Connect to the Server Fail in SSO-Enabled Environments](#)

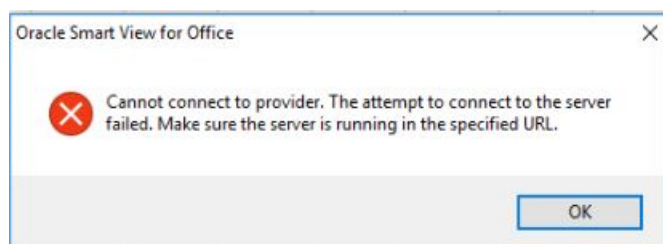
Smart View Does not Connect to a Data Source

Oracle Smart View for Office fails to establish a connection with a data source primarily because of errors in the shared or private connection URL that is being used. For information on connection types, see [Shared Connections and Private Connections](#) in *Oracle Smart View for Office User's Guide* .

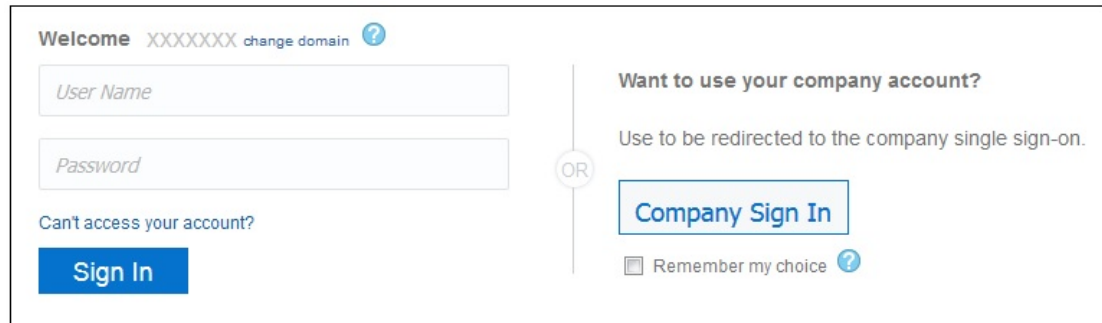
- Verify that the connection URL syntax and the credentials being used are accurate.
- Using a browser, access the environment that supports the data source. Make sure that you can log in using the credentials that you are using to access the data source through Smart View.
- If the issue persists, seek Oracle's help using the steps detailed in [Getting Help](#) in the *Oracle Enterprise Performance Management Cloud Operations Guide* .

Attempts to Connect to the Server Fail in SSO-Enabled Environments

Smart View fails to establish a connection to an Oracle Enterprise Performance Management Cloud environment that is configured for SSO and displays the following error:



This error is displayed if you previously selected the **Remember my choice** option in a browser while signing into an EPM Cloud environment using the **Company Sign In** button.



To resolve this issue, complete this procedure:

1. Close Microsoft Excel.
2. Delete browsing history, temporary internet files, cookies and site data, and form data.
3. Open Excel and sign into Smart View.

Problem Opening Files in Excel

Sometimes, temporary files and folders stored in the `C:\Users\UserName\AppData\Roaming\Microsoft\Excel` folder can cause issues when trying to open a workbook file in Excel. You can back up the contents of this folder and then clear the folder to improve performance when opening a workbook.

To improve Excel performance when opening a workbook:

1. Close all applications and restart your computer once.
This is to ensure that there are no hidden instances of Excel running in the background.
2. After the reboot, create a folder on your computer (for example, in the `Desktop` or the `Documents` folder) and give it a descriptive name (for example, `Excel AppData Backup`).
3. Open Windows File Explorer, then select the **View** menu, and then select the check box to show **Hidden items**.
4. Navigate to:

```
C:\Users\User_Name\AppData\Roaming\Microsoft\Excel
```

Replace `User_Name` with your Windows login user name.

5. Use Windows Cut and Paste to move all the files and folders from the directory you created in the previous step to the backup folder that you created in [step 2](#).
The `C:\Users\User_Name\AppData\Roaming\Microsoft\Excel` folder should be empty.
6. In File Explorer, go to the **View** menu and clear the **Hidden items** check box.
7. Close File Explorer, and then start Excel.
8. Try opening the files that you were having problems opening earlier.

Enabling and Disabling Smart View and Other Office Add-ins

You can enable and disable Oracle Smart View for Office and other Microsoft Office add-ins from the **Add-Ins** tab in Excel Options. In some cases, Smart View performance can be improved when other Office add-ins are disabled.

To enable or disable Smart View or other Office add-ins for all applicable Office applications (including Outlook):

1. Open Excel, Word or PowerPoint.

Do not use Outlook to enable and disable Office add-ins.

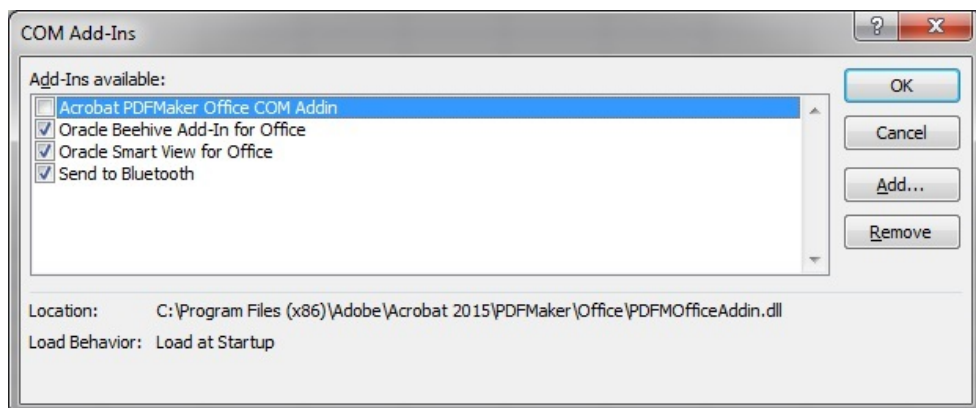
2. Go to **File**, then **Options**, and then **Add-Ins**.

Continue with step 3 to work with COM Add-ins. Continue with step 4 to work with Excel Add-ins.

3. To enable or disable COM add-ins, from **Manage**, select **COM Add-ins**, then click **Go** and then perform a task:

- To enable add-ins, ensure that the check box next to the add-in is checked.
If the check box next to the add-in is cleared, then click the check box to select it, and then click **OK**.
If the add-in you want to enable is not in the list, click **Add**, navigate to the location of the add-in file in your system and select it, then click **OK**, and then click **OK** again in the **COM Add-Ins** dialog to close it.
- To disable add-ins, ensure that the check box next to the add-in is cleared.
If the check box next to the add-in is checked, then click the check box to clear it, and then click **OK**.

In the following example **COM Add-Ins** dialog box, the **Acrobat PDFMaker Office COM Addin**, is disabled; other available add-ins are enabled, including Smart View.



4. To enable or disable Excel add-ins, from **Manage**, select **Excel Add-ins**, then click **Go** and then perform a task:

- To enable add-ins, ensure that the check box next to the add-in is checked.

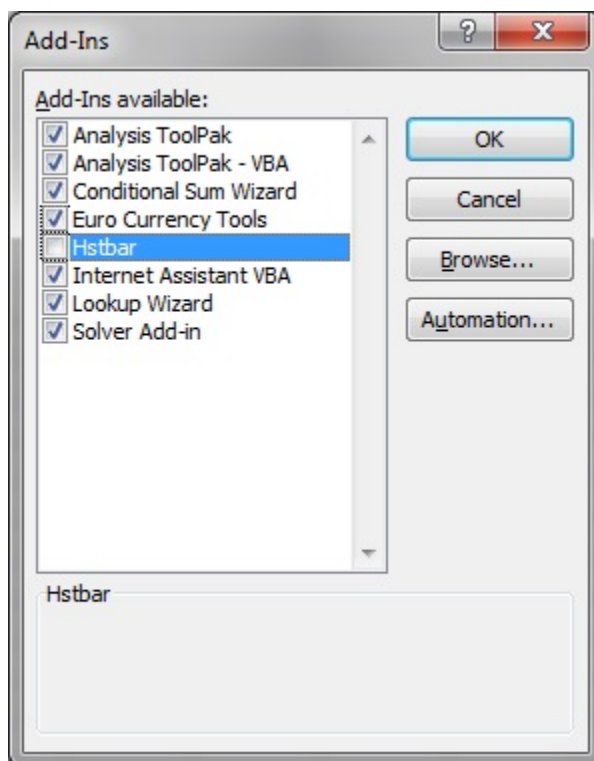
If the check box next to the add-in is cleared, then click the check box to select it, and then click **OK**.

If the add-in you want to enable is not in the list, click **Browse**, navigate to the location of the add-in file in your system and select it, then click **OK**, and then click **OK** again in the **COM Add-Ins** dialog to close it.

- To disable add-ins, ensure that the check box next to the add-in is cleared.

If the check box next to the add-in is checked, then click the check box to clear it, and then click **OK**.

In the following example **Add-Ins** dialog box, the Smart View add-in, **Hstbar**, is disabled; other available add-ins are enabled. Note that these add-ins are not related to Smart View.



5. Restart any open Office applications.

Disabling the Smart View Add-on in Apps Other than Excel

If users plan to work with Oracle Smart View for Office only in Microsoft Excel, and not with Word, PowerPoint, or Outlook, you can edit Windows Registry keys to prevent Smart View from loading into the other Office applications.

Before you edit the Registry, ensure that all Office applications are closed and no Office processes are running in the Task Manager.

To disable loading Smart View into Word, PowerPoint, or Outlook, open the Registry, navigate to each of the Office applications listed below, and set the **LoadBehavior** value for each applications to 0.

Word:

```
HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\Word\Addins\Hyperion.Common
Addin
```

PowerPoint:

```
HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\PowerPoint\Addins\Hyperion.
CommonAddin
```

Outlook:

```
HKEY_CURRENT_USER\SOFTWARE\Microsoft\Office\Outlook\Addins\Hyperion.Com
monAddin
```

When **LoadBehavior** is set to 0, the respective Office application will not load the specific add-in.

Restart the affected Office applications and verify that the Smart View ribbon does not display.

You can disable any or all of the above Office applications, as required.

To switch back to loading the Smart View add-on for specific Office applications, set the **LoadBehavior** value for the application to 3. This will cause the Smart View add-on to be loaded when restarting the Office application.

Errors when Launching Office after Installing Smart View

Two types of errors may occur when launching Oracle Smart View for Office. If you encounter these errors, use the workarounds noted below.

- [Unable to set the installed property of the add-in class](#)
- [Add method of AddIns class failed](#)

Unable to set the installed property of the add-in class

After installing Smart View and launching Excel the first time, you may get an error message similar to the following:

```
Unable to set the installed property of the add-in class.
```

If you see this error, enable the Smart View add-in:

1. Open Excel, Word or PowerPoint.
Do not use Outlook to enable and disable Office add-ins.
2. Go to **File**, then **Options**, and then **Add-Ins**.
3. From **Manage**, select **COM Add-ins**, then click **Go**.
4. Ensure that the check box next to **Oracle Smart View for Office** is checked.

If the check box next to the add-in is cleared, then click the check box to select it, and then click **OK**.

If the **Oracle Smart View for Office** add-in is not in the list, click **Add**, navigate to the location of the add-in file in your system (by default, `C:\Oracle\SmartView\bin\HsTbar.xla`) and select it, then click **OK**, and then click **OK** again in the **COM Add-Ins** dialog to close it.

5. Restart Office.

Add method of AddIns class failed

After installing Smart View, the following error occurs each time Excel is launched:

```
Add method of AddIns class failed.
```

If you see this message, click **OK** in the error message box. Excel and Smart View will then work properly.

Extension Installation from EPM Cloud and Message Window Focus

Installing extensions from supported Oracle Enterprise Performance Management Cloud services involves downloading an extension installer file and double-clicking it. When double-clicking an extension installer (.svext), a message window is displayed indicating the success or failure of the installation. The message window can sometimes lose focus and go behind another open window, and can easily go unnoticed. This may lead to users trying to install the extension again, causing an error due to the previous open message window having a hold on the folder and files.

To clean up this extension installation issue:

1. Close all Office applications (Excel, Word, PowerPoint, Outlook).
2. Check the Windows task bar for an existing message window, and close it.
3. Remove prior extension installations:
 - a. Navigate to `%AppData%\Oracle\SmartView\extensions\bin`
 - b. Delete the extension folder.
For example, to delete the Narrative Reporting extension folder, delete the `Oracle.SmartView.EPRCSExtension` folder.
 - c. Delete the extension installation folder.
For example, to delete the Narrative Reporting extension installation folder, delete the `EPRCSProviderInstaller` folder.
4. Remove pending installations:
 - a. Navigate to `%AppData%\Oracle\SmartView\extensions\update`
 - b. Delete the pending extension installation folder.
For example, to delete the Narrative Reporting pending extension installation folder, then delete the `Oracle.SmartView.EPRCSExtension` folder.
5. Return to the location where you previously downloaded the extension installer file, and double-click it.
For example, to install the Narrative Reporting extension, double-click `EPRCSProviderInstaller.svext`.

6. Open Excel, Word, or PowerPoint, and in the Smart View ribbon, click **Options**, then select **Extensions**, and then verify that the extension you installed is listed.

Extension Updates and Office Applications Remaining Open

In order for extensions to be properly installed, removed, or updated, all Office applications must be shut down. When an Office application is reopened, updates for extensions are applied.

Sometimes, even though an Office application has been closed, it does not completely shut down, or does not shut down in a timely manner. In these cases, an instance of Office is still running and Oracle Smart View for Office is unable to apply the extension updates correctly.

For these situations, it may be necessary to open the **Windows Task Manager** and look for possible Office applications that may still be running. For Windows 10 users, navigate to the **Details** tab to find the correct process name corresponding to the Office applications. Other Windows version users, navigate to the **Processes** tab. Application names to look for are Excel.exe, Outlook.exe, PowerPnt.exe, and Winword.exe.

If any of these application names are displayed in the Task Manager, click on the name and end the process.

Once all Office applications are closed, reopen one of the applications so that Smart View can apply pending updates.

Slowness with 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.

Office Slow to Start when Internet Connectivity is Not Available

When starting Office, Oracle Smart View for Office performs various security checks at startup, including checks on all the installed extensions. Internet connectivity is required in order to perform these checks.

Without internet connectivity, the security checks on extensions cannot be carried out and Office applications will be very slow to launch.

You may disable extensions in order to improve Office startup time, but you will lose the functionality related to those extensions, even if you are still able to connect to data providers through your company's intranet.

Oracle recommends verifying that you can connect to the internet when starting Office with Smart View installed.

Excel Process Stops Responding (Hangs) on Shut Down

Excel may be slow to shut down if the `Excel15.xlb` file is corrupted. This file stores changes to the ribbons in Excel.

A simple fix to this issue is to rename `Excel15.xlb`. A clean `Excel15.xlb` file is rebuilt the next time you start Excel.

The `Excel15.xlb` file is located in the
`C:\Users\user\AppData\Roaming\Microsoft\Excel` folder.

To rename the `Excel15.xlb` file, see [Renaming or Deleting the Excel xx.xlb File](#).

Add-ins Menu Still Displays After Smart View Uninstall

When Oracle Smart View for Office is installed, a Smart View ribbon tab is displayed in Office. This is the expected behavior.

In some cases, after uninstalling Smart View and installing a newer version, an Add-ins ribbon tab is also displayed next to the Smart View ribbon tab. Moreover, in some cases, after uninstalling the newer version of Smart View and restarting Excel, the Smart View ribbon tab is no longer displayed, as expected, but the Add-ins tab remains.

This issue can be caused by a corrupted `Excelnn.xlb` file. This file stores changes to the ribbons in Excel.

You can fix this issue by renaming or deleting the `Excelnn.xlb`. A clean `Excelnn.xlb` file is rebuilt the next time you start Excel.

The `Excelnn.xlb` file is located in the
`C:\Users\user\AppData\Roaming\Microsoft\Excel` folder.

To rename the `Excelnn.xlb` file, see [Renaming or Deleting the Excelnn.xlb File](#).

Renaming or Deleting the Excelnn.xlb File

You may need to rename or delete `Excelnn.xlb` if it is determined that this file is causing issues with your Oracle Smart View for Office installation.

Renaming or deleting the existing `Excelnn.xlb` file causes a new `Excelnn.xlb` to be created the next time you start Excel. This usually fixes any issues you may have had with the previous version of the `XLB` file.

To rename or delete the `Excelnn.xlb` file:

1. Close any open Excel applications and ensure that all `excel.exe` processes in the Windows **Task Manager** are ended.
2. Locate the `Excelnn.xlb` file in your `AppData` folder.

For example, the default location of the `Excelnn.xlb` file is:
`C:\Users\user\AppData\Roaming\Microsoft\Excel`

 **Tip:**

You can quickly navigate to this folder by entering %appdata%\Microsoft\Excel in the address bar of Windows Explorer.

3. Right-click the `Excelnn.xlb` file name, then perform either of these tasks:
 - Select **Rename**, then enter a new name for the file, and then press **Enter**.

For example, append `.old` to the file name:

```
Excel15.xlb.old
```

- Select **Delete**.

4. Restart Excel.

A clean `Excelnn.xlb` file is created in the

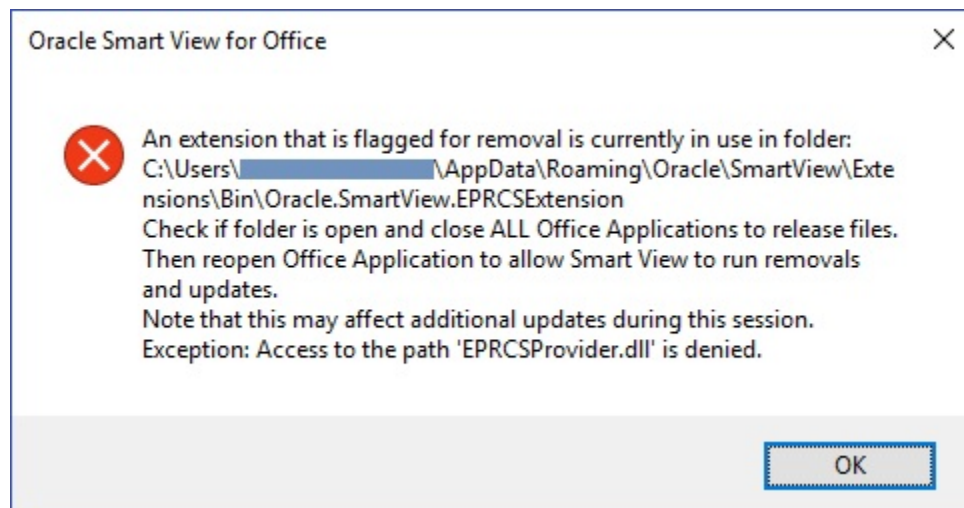
`C:\Users\user\AppData\Roaming\Microsoft\Excel` folder.

Extension Updates and Outlook

When applying extension updates, if any Office application is running, including Outlook, a message directs the user to close all Office applications. This includes Outlook, as well as Excel, Word, and PowerPoint.

If the message in [Figure 1](#) is displayed after attempting an extension update, it means that one of the Office applications was *not* closed. Often, the application left open is Outlook.

Figure 6-1 Message - Office Application Open During Extension Update



If Smart View is *not* needed for Outlook, it can be disabled to help avoid this issue during extension updates.

To disable Oracle Smart View for Office in Outlook:

1. In Outlook, go to the Smart View ribbon, then select **Options**, and then select **Advanced**.
2. Under **Display**, select the **Disable Smart View in Outlook** check box.
3. Click **OK**, and then close Outlook.
4. Restart Outlook.
Verify that the Smart View ribbon no longer appears.
5. Start a different Office application to continue the extension update process.

Enabling the Smart View Extension for Firefox


During installation, Oracle Smart View for Office automatically installs an extension for Mozilla Firefox.

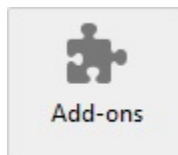
If you specify Firefox as your default browser, Smart View utilizes the extension for Firefox in these scenarios:

- Performing drill-through in Smart View
- Launching forms in Smart View from browser-based applications, such as Oracle Hyperion Financial Management or the Planning business module in Oracle Enterprise Performance Management Cloud.

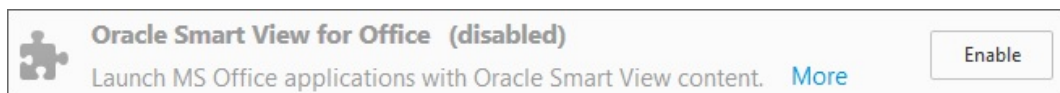
The extension for Firefox is automatically enabled after installing Smart View. However, if the extension should become disabled, follow the procedure in this topic to enable it again.

To enable the Smart View extension for Firefox:

1. In Firefox, in the upper right corner of the browser, click , and then select **Add-ons** from the drop-down menu:

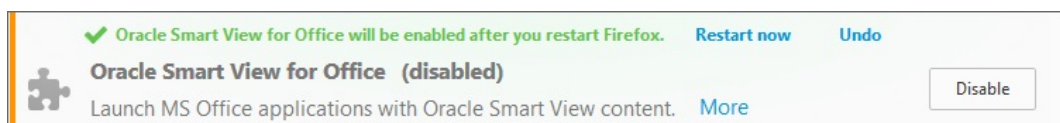


2. In the left pane, select **Extensions**, and then scan or search the list to locate the **Oracle Smart View Office** entry.



3. Click **Enable**, and restart Firefox.

You can restart Firefox immediately using the **Restart now** link, or restart Firefox at your convenience.



Uninstallation Process Stops Responding

On supported Windows platforms, the Oracle Smart View for Office uninstallation process may stop responding.

If you have experienced this issue, try the following:

1. In the **Windows Task Manager**, kill all occurrences of these processes:
 - **Microsoft Register Server**
 - **Windows Installer**
2. In the **Control Panel**, check **Programs and Features** to verify if **Oracle Smart View for Office** is listed.

If **Oracle Smart View for Office** is not listed, then the uninstallation completed successfully.

If **Oracle Smart View for Office** is listed, select it, and then select **Uninstall** to try the uninstallation again.

Excel Looks for HsTbar.xla File After Uninstall

Sometimes, after uninstalling Oracle Smart View for Office and subsequently launching Excel, Excel may still try to locate the Smart View `HsTbar.xla` file.

To correct this, you must edit the Windows Registry.

To edit the Windows Registry to keep Excel from looking for `HsTbar.xla` file after uninstalling Smart View:

1. Open the Windows Registry Editor (enter `regedit` in a command window).
2. Locate this key:

```
HKEY_CURRENT_USER\Software\Microsoft\Office\<OfficeVersion>\Excel\Options
```

3. Delete the `OPEN` or `OPEN<n>` entry where the value in the **Data** column contains `HsTbar.xla`.

For example:

```
C:\Oracle\SmartView\bin\HsTbar.xla
```

When there are multiple `OPEN` entries, perform these steps:

- a. Delete all `OPEN` entries where the **Data** column value contains `HsTbar.xla`.
- b. Rename all remaining `OPEN<n>` entries, maintaining their sequential values.

For example, here are six `OPEN` entries, where two of the entries, `OPEN` and `OPEN4`, contain `HsTbar.xla` in the **Data** column.

| Name | Value in Data Column |
|--------------------|--|
| <code>OPEN</code> | Contains <code>HsTbar.xla</code> |
| <code>OPEN1</code> | Does not contain <code>HsTbar.xla</code> |
| <code>OPEN2</code> | Does not contain <code>HsTbar.xla</code> |

```
OPEN3    Does not contain HsTbar.xla
OPEN4    Contains HsTbar.xla
OPEN5    Does not contain HsTbar.xla
```

Delete the `OPEN` and `OPEN4` entries, and then rename the remaining entries as follows, maintaining their sequential order:

- Rename `OPEN1` to `OPEN`
- Rename `OPEN2` to `OPEN1`
- Rename `OPEN3` to `OPEN2`
- Rename `OPEN5` to `OPEN3`

The remaining entries are:

```
Name      Value in Data Column
OPEN      Does not contain HsTbar.xla
OPEN1     Does not contain HsTbar.xla
OPEN2     Does not contain HsTbar.xla
OPEN3     Does not contain HsTbar.xla
```

Connection Error

Oracle Smart View for Office may fail to connect to Planning or Planning Modules with the script error,

```
An HTTP error occurred with the code "-1"
```

The workaround is to set the **Browser Emulation Mode** option in the **Health Check** dialog; for example, set this option to 11001 for Microsoft Internet Explorer 11.

For more information on the **Browser Emulation Mode** option in the **Health Check** dialog, see [Performing a Health Check on Your System](#) in the *Oracle Smart View for Office User's Guide*.

Working with Custom HTML-based Login Forms

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 Oracle Smart View for Office integration with Oracle Access Manager to work.

Drill-through with Chrome: Blocklist and Allowlist for Native Messaging

Drill-through with a Google Chrome browser can fail when Chrome is managed by enterprise policy. In this case, native messaging applications can use a blocklist or an allowlist. For example, if an administrator restricts access to all messaging hosts by using a blocklist (by specifying " * " in the blocklist registry key), then drill-through from Oracle Smart View for Office would not work with Chrome.

In order to enable the Smart View native application which supports the Chrome extension (the application is `C:\Oracle\SmartView\bin\SVNatvMsg.exe`), then an administrator must add the name of the application, `com.oracle.smartview.nmh` (as specified in `C:\Oracle\SmartView\bin\chromenmh.json`) to the allowlist registry key.

 **Note:**

- Creating a blocklist is described here:
<https://cloud.google.com/docs/chrome-enterprise/policies/?policy=NativeMessagingBlocklist>
- Creating an allowlist is described here:
<https://cloud.google.com/docs/chrome-enterprise/policies/?policy=NativeMessagingAllowlist>

Browser Settings When Working with XML Files on HTTP Server

Web browsers may cache XML files posted on an HTTP server and referenced by Oracle Smart View for Office. This can cause problems when using the following Smart View functionality:

- Accessing shared connections from an XML file
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. If you plan to access online help from a local drive or internal web server, this file can also specify the location of the help.
- Updating extensions
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 the **Internet Properties** dialog in the Control Panel

1. Launch the Control Panel, and then select **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.

Flickering Issues on Office 2013 and Office 2016

When using Oracle Smart View for Office with Microsoft Office 2013 or 2016, 32-bit or 64-bit, flickering occurs with the POV toolbar and the Smart View Panel. The flickering is likely caused by changes in Excel 2013 and Excel 2016.

To reduce flickering, use the Health Check utility in Smart View to specify the settings for "Disable Window Transitions on Addin Task Panes" and "Disable Animations," listed under "Graphics Settings." Oracle advises using the recommended settings for these options. See [Performing a Health Check On Your System](#) for more information.

Smart View HTTP Session Timeout

HTTP session timeouts can occur, for example, when working with large queries that take a long time to run, or when you're experiencing slower internet connections.

Other errors you may see in an HTTP session timeout include:

- An "Invalid pointer" error
- "XML Load Error: XML Document must have a top level element"

To avoid HTTP session timeouts, you may add the following Windows Registry DWORDS to the Internet Settings key:

- Key Name:

```
HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Internet  
Settings
```

- Key Values:

- DWORD: ReceiveTimeout
Value data: *value in milliseconds*
- DWORD: KeepAliveTimeout
Value data: *value in milliseconds*
- DWORD: ServerInfoTimeout
Value data: *value in milliseconds*

For example, 900000 milliseconds is the equivalent of 15 minutes. Adjust the timing according to your requirements.

As a guideline, 900000 milliseconds is the equivalent of 15 minutes.

To add the timeout key values to the Internet Settings registry key:

1. Ensure that all Office applications, including Outlook, are closed.
2. Launch the Windows Registry Editor.
3. Locate and then select the following registry subkey:

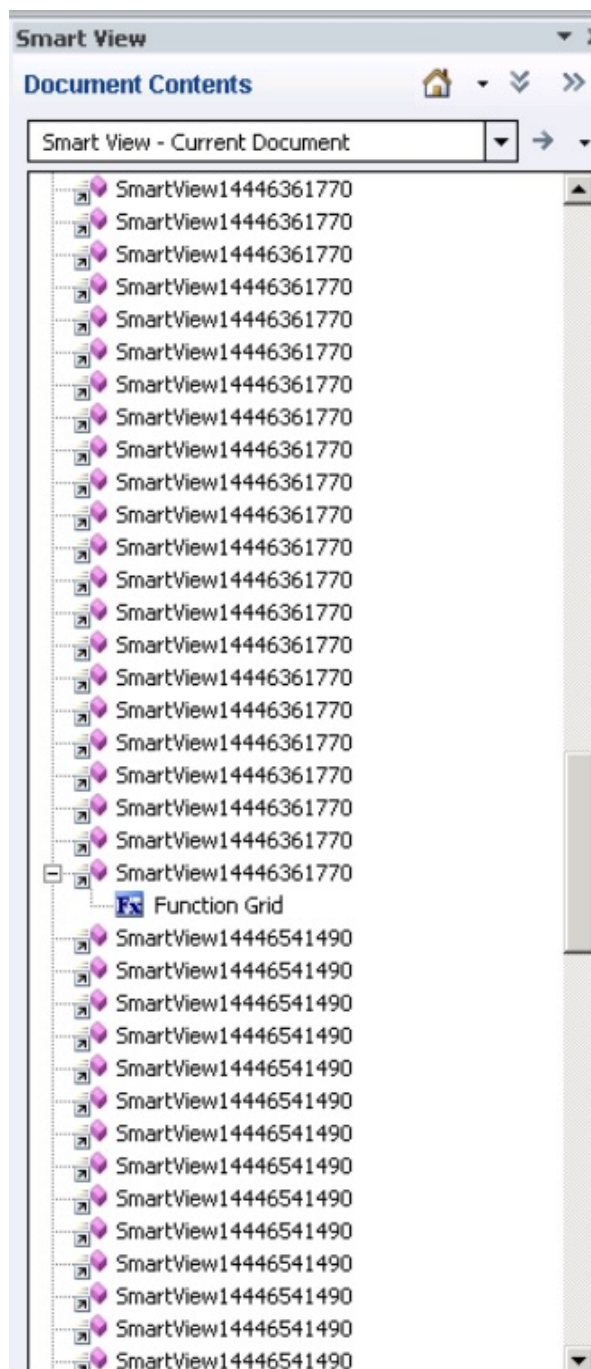
```
HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Internet  
Settings
```

4. Add the three DWORD key values, `ReceiveTimeout`, `KeepAliveTimeout`, and `ServerInfoTimeout`:
 - a. From the **Edit** menu, select **New**, and then select **DWORD Value**.
 - b. Type the DWORD name, and then press **Enter**.
 - c. In the **Details** pane, right-click DWORD you added in step 4.b, and then select **Modify**.
 - d. In the **Value data** text box, type the timeout value in milliseconds, select **Decimal**, and then click **OK**.
 - e. Repeat step 4.a through step 4.d for each of the three required DWORD key values.
5. Exit Registry Editor.
6. Restart Excel.

Duplicate Queries in Word Slow to Refresh

In some Word documents containing a large number of queries and created prior to Oracle Smart View for Office release 11.1.2.5.520, performance may be an issue when refreshing the data in the document. In some cases, instead of re-using existing queries where appropriate, each Smart View data point in the Word document is treated as a separate query. The result is that Refresh operations can be very slow.

If the document contains many duplicate queries (that is, queries with the same name), the duplicate queries are displayed in the Document Contents pane in Word. For example, Document Contents might look like this:



The duplicate queries are SmartView14446361770 and SmartView14446541490.

You can run the Visual Basic macro below to remove the duplicate queries:

```
Sub DeleteExtraQueries()  
,  
    ' DeleteExtraQueries Macro  
,  
    Dim queriesName As Variant  
    Dim uniqueQueriesName As New Collection  
    Dim varName, newList As String
```

```

Set vars = ActiveDocument.Variables

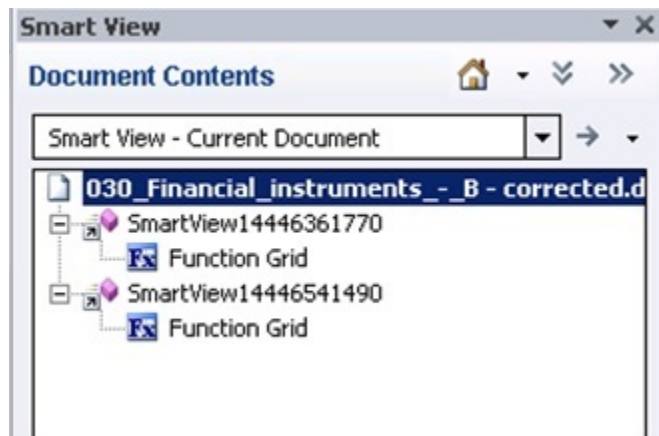
For i = 1 To vars.Count
    varName = vars.Item(i).Name
    If Not StrComp(vars.Item(i).Name, "SV_QUERY_LIST", vbTextCompare)
Then
        List = vars.Item(i).Value
        queriesName = Split(List, "<|>")

        On Error Resume Next
        For Each queryName In queriesName
            uniqueQueriesName.Add queryName, queryName
        Next
        newList = ""
        For Each queryName In uniqueQueriesName
            newList = newList & queryName & "<|>"
        Next
        newList = Left(newList, Len(newList) - 3)
        vars.Item(i).Value = newList
    End If
Next

End Sub

```

After running the macro, the two queries, SmartView14446361770 and SmartView14446541490, appear only once in Document Contents:



Custom Styles and Merged Cells in Forms

Excel formatting and custom styles are intended for use with static grids. When the grid contains merged cells, then changing the POV can result in invalid formatting. Other operations that can result in invalid formatting are:

- Changes to Suppression options
- Enabling or clearing the Repeat Member Labels options

- Adding members to the form definition

After any of these operations, if you encounter an error, such as "We can't do that to a merged cell" or invalid formatting with your form layout, try the following steps:

1. In the Planning ribbon, **Formatting** group, click **Clear**.
2. In the **Formatting** group, click **Save**.
3. Open the form on a new sheet.

Fixing Function Links on Machines where Smart View was Reinstalled in a User-specified Location

When connected to an Oracle Smart View for Office provider, such as Tax Reporting in EPM Cloud or Essbase in EPM System, and using functions on a machine where Smart View was reinstalled in a different location (for example, originally Smart View was installed in the default installation location and then, on the same machine, Smart View was reinstalled in a user-specified, non-default location), the functions may not work correctly after reinstalling Smart View. To fix this issue, perform the following steps:

1. In Excel, go to **File**, then **Options**, then **Add-ins**, then **Excel Add-ins**, and click **Go**.
2. In the **Add-ins** dialog, select the check box for **Hstbar**. This gives an error message stating that "the HsTbar.xla file is not found in the location. Do you want to delete it?" Click **Yes** to delete it.
3. Close and relaunch Excel.
4. Open the saved workbook and connect to the data provider.
5. In the Smart View ribbon, go to Functions, and then **Fix Links**.
Fix Links updates the function definitions.

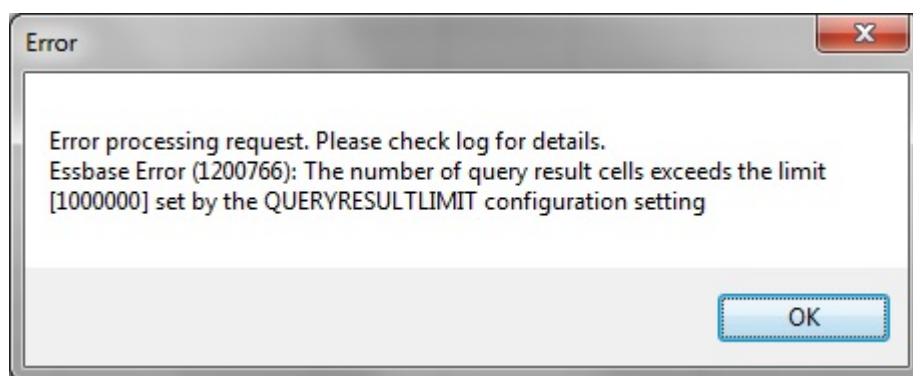
Session Timeout when Connected Using Vanity URLs

You may experience a timeout error when trying to connect in Smart View using a vanity URL. This issue is vendor-specific, as the timeout is occurring on the vanity URL provider. The vendor is delivering the error message in this case.

Memory Error on Large Queries

Data source types: Oracle Essbase, Oracle Analytics Cloud - Essbase

When running large MDX queries against an aggregate storage database, you may run in to the following "out of server memory" error:



To resolve this issue, raise the limit in `QUERYRESULTLIMIT` in `essbase.cfg`. See [QUERYRESULTLIMIT](#) in the *Technical Reference for Oracle Analytics Cloud - Essbase* for instructions on this configuration setting.

 **Note:**

The information in [QUERYRESULTLIMIT](#) applies to both Oracle Analytics Cloud - Essbase and these Essbase versions: 11.1.2.4.008, 11.1.2.4.505, and 11.1.2.3.508_22314799.

Issues with Dynamic Data Exchange Option in Excel

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 from a browser 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.

Performance and Memory Usage Considerations for Smart View with Excel

Oracle Smart View for Office is a Microsoft Office add-in. As an add-in, it is loaded in to the Microsoft Excel process. When a report is imported into Excel through Smart View, the Excel process consumes memory and this can negatively impact performance.

For example, instances of grids and forms, objects in the Undo buffer, XML parsing, etc., will cause the Excel process to consume memory. Because of this, the Excel or machine memory limit becomes the Smart View memory limit as well. This can severely impact performance.

There is no memory configuration parameter in Smart View to manage this.

Excel 32-bit and 64-bit have different memory limits:

- For Excel 32-bit, the maximum memory limit, or RAM, is 2GB.
Oracle testing showed that when Excel 32-bit memory usage reaches beyond 700 MB, Excel can behave abnormally and can terminate unexpectedly.
- The 64-bit versions of Excel are not constrained to 2 GB of RAM, as are the 32-bit Office applications.
For large reports, Oracle recommends using 64-bit Excel. Or consider reducing the data being sent to Smart View by reducing the number of rows, columns, and POVs in the reports.

Oracle suggests that you consider taking some or all of the actions listed below in an effort to limit memory usage and improve performance.

The following actions can help to limit memory usage:

1. In the Smart View **Options** dialog box, **Advanced** tab, ensure that these options are enabled:
 - **Reduce Excel File Size**
 - **Improve Metadata Options**
2. In the **Options** dialog box, **Advanced** tab, set **Number of Undo Actions** to '0' (zero), if possible, or to a low number such as 1 or 2.
3. Change Excel calculation from Automatic to Manual. Go to the Excel **Formulas** ribbon, then select **Calculation Options**, and then select **Manual**.
4. In the **Options** dialog box, **Formatting** tab,
 - a. If you have selected the **Use Excel Formatting** option, then you should clear the **Move Formatting on Operations** option.
 - b. Clear the **Adjust Column Width** option.
 - c. Clear the **Retain Numeric Formatting** option.
5. In the **Options** dialog box, **Extensions** tab, disable any unneeded extensions.
6. In Excel, to improve performance and stability, disable or uninstall any unused add-ins. For example, disable or uninstall the Oracle Essbase Spreadsheet Add-in. Other possible add-ins to disable or uninstall are, for example, Adobe PDF, WebEx, or Send to Bluetooth
7. Reduce the workbook size.
8. Limit the data imported to Excel:
 - a. Use prompts, filters, POVs, or other ways to reduce the data returned back to Smart View.
 - b. Enable the **Suppress Rows** and **Suppress Columns** options in the **Data Options** tab of the Smart View **Options** dialog box.

The following actions can help to improve performance, as well as limit memory usage:

1. In the **Options** dialog box, **Advanced** tab, set **Number of Undo Actions** to '0' (zero), if possible.
2. In the **Options** dialog box, **Member Options** tab, ensure that these options are cleared:
 - **Preserve Formulas and Comments in ad hoc options**
 - **Formula Fill**

Clear these options only if you do not need to preserve formulas or comments during ad hoc operations.

Also, refer to the following documentation from Microsoft, "Excel 2010 Performance: Performance and Limit Improvements":

[http://msdn.microsoft.com/en-us/library/ff700514\(v=office.14\).aspx](http://msdn.microsoft.com/en-us/library/ff700514(v=office.14).aspx)

Unbalanced Loads in Provider Services Clustered Environments

In some Oracle Hyperion Provider Services clustered environments, if Oracle Smart View for Office requests appear to be going to only one server in the cluster (that is, the load is unbalanced), then try changing the Internet Properties security level to Medium.

To do this, in the Control Panel, select **Internet Options**, and then select the **Security** tab. Under **Security levels for this zone**, set the allowed level for the affected zone to **Medium**.

Two-Way SSL and Problematic Certificates

If two-way SSL is set up with problematic certificates between Oracle Smart View for Office and other Oracle Enterprise Performance Management System data providers, Smart View will prompt for the client-side certificate with every request. For example, the user will be prompted when connecting to the data source, connecting to an application, connecting to a database, and at every refresh, submit, or zoom operation.

To avoid this situation, you must update the `properties.xml` file on each end user machine to add the `clientCert` name tag. For example:

```
<cfg>
  <provider>
    <url>http://server:port/workspace/SmartViewProviders</url>
  </provider>
  <helpurlcontext></helpurlcontext>
  <extensionupdatelist>http://server:port/extensionupdatelist/
UpdateList.xml|%SVCLIENTINSTALLPATH%/extensions/UpdateList.xml</
extensionupdatelist>
  <!-- Require Smart View to prompt the user for the client-side
certificate -->
  <clientCert name="PROMPT-ONLY"/>
</cfg>
```