Oracle® Smart View for Office

Readme

Release 21.200

F49524-09

June 2022

Smart View 21.200 Readme

Related Topics

Purpose

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

New Features in Release 21.200

Related Topics

- Open Flex Forms from Task List

- Member Information Available for EPM Cloud and Oracle Hyperion Planning

- New Smart View Function Message

- New Template for Creating Multi-Cube FreeForm Applications in Smart View

- New Suppression Option for Form-Based Ad Hoc Grids

- Task Manager Extension for Smart View Now Supported for Planning and Planning Modules

- Books Extension Features and Updates

- Narrative Reporting Features and Updates

Performing Calculations Without Having to Submit Your Changes (Calc on the Fly)

Applies to: Planning, Planning Modules, FreeForm

During ad hoc analysis you can perform calc on the fly in Oracle Smart View for Office, as well as in your Planning, Planning Modules, or FreeForm business process, without having to submit changes to the database.

In Smart View, use the **Insert Member Formula** option in the Planning Ad Hoc ribbon to view the location of formulas on the grid. A green triangle in the upper left corner of a cell indicates a formula cell. Select a formula cell, and a tool tip appears containing the member formula, along with the member names and mathematical operators.

Enter values or change existing values in the data cells and see the cells with formulas refresh immediately with the calculated values. You do not need to submit the changes to see the calculated values. When you have completed all your data changes and are satisfied with the calculations, you can then submit the modified values to the database. Or you can close without submitting the updated values.

To enable calc on the fly for Smart View and the web application:

- Administrators—In **Application Settings** set **Enable User Formulas in Ad Hoc** to **Yes**.

- Users—In the **User Preferences**, **Display** page in the web, set **Enable User Formulas in Ad Hoc** to **Yes**. This user preference setting overrides the application setting.

> **Note:**
>
> Calc on the fly requires Planning, Planning Modules, or FreeForm 22.03 or later.

With calc on the fly, you can quickly perform multiple calculations in an ad hoc grid without having to submit the changes to see the results. For more information, see:

- What Application and System Settings Can I Specify? in *Administering Planning*

- What Application and System Settings Can I Specify? in *Administering and Working with FreeForm*
- Setting Your Display Preferences in *Working with Planning*
- Performing Calculations Without Having to Submit Your Changes (Calc on the Fly) in *Working with Oracle Smart View for Office*
- Performing Calculations Without Having to Submit Your Changes (Calc on the Fly) in *Working with Planning*

Reports Support In Core Smart View

You now can export Oracle Enterprise Performance Management Cloud Platform Reports to Excel (fully formatted) from the web and import Reports (fully formatted and ad hoc) into Oracle Smart View for Office Excel, change the POV, and refresh the report data, as needed.

Once you've imported a report as a fully-formatted report, you can:

- Respond to and edit prompts

  If the report contains prompts, then upon import, you respond to the prompts. You can also later edit the prompts and refresh the report in Excel.
- Change the POV and refresh the imported report data, as needed
- Generate an ad hoc grid from the report, and then perform further ad hoc operations for the purpose of data analysis

Importing a Report as a fully formatted report in Smart View, allows you to quickly and easily have a refreshable report that you can save.

Importing a Report as an ad hoc query allows you to perform available ad hoc operations, such as zoom, pivot, and member selection.

For more information on working with Reports in Smart View, see the chapter, Reports in the EPM Cloud Platform, in *Oracle Smart View for Office User's Guide* .

Save Office Documents to EPM Cloud from Smart View

Applies to: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

In Oracle Smart View for Office, you now have the ability to save Microsoft Office documents (Word, Excel, and PowerPoint files) to the EPM Cloud Library using the new **Save** and **Save As** options in the Smart View ribbon.

> ✏ **Note:**
>
> Previously, the **Save** and **Save As** feature was available only in Narrative Reporting when logged in to a Narrative Reporting business process.

Users often share Office documents by emailing them or saving them to an internal location. Storing files in the EPM Cloud Library gives you a new option for saving files in a central location and facilitates sharing documents with other users. You can also download saved files from the library.

You may organize documents by creating folders in the EPM Cloud Library. You can create folders in the web application or in the tree structure in the Smart View Panel under the **Documents** node.

In order to save Office documents and view the folders and files under the **Documents** node in the Smart View Panel, you must be connected to a supported Oracle Enterprise Performance Management Cloud business process. If you aren't already connected to an EPM Cloud business process, you will be prompted to sign in when using the **Save** or **Save As** options.

Any Word, Excel, or PowerPoint file may be saved to the EPM Cloud Library. The files do not need to contain Smart View content from an EPM Cloud business process.

> **✎ Note:**
>
> The ability to save Office documents to the EPM Cloud Library is enabled by default in Smart View.
>
> This feature is available by default to users with the predefined Service Administrator or Power User roles. For more information on assigning roles, see Managing Users and Roles in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*.
>
> Narrative Reporting users have no role requirements when saving Office documents to a Narrative Reporting business process.
>
> Service Administrators can remove access to saving Office documents to EPM Cloud by setting the `enableLibrary` property to `0` in the Smart View `properties.xml` file. This file is located by default in `C:\Oracle\SmartView\cfg`.

For more information on using the **Save** and **Save As** options in Smart View with one of the EPM Cloud business process noted in "Applies to" above, see Saving Office Documents to EPM Cloud in the *Oracle Smart View for Office User's Guide* .

For information on saving Office documents as a Narrative Reporting user in a Narrative Reporting business process, see Saving Office Documents to EPM Cloud in Narrative Reporting in Smart View in the *Oracle Smart View for Office User's Guide* .

Flex Forms Now Support Flexible Dimensions on Columns

Applies to: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Flex forms now support flexible dimensions on columns, in addition to rows.

Previously, flexible dimensions were only supported for row dimensions.

During form definition in the web interface for EPM Cloud 21.12 or later, administrators select the **Enable flex form for rows** and the **Enable flex form for columns** options under **Smart View Options** in the **Layout** tab to enable flex form-specific features. For each flex form, one or both options can be selected.

Flex forms combine the benefits of forms, such as running Business Rules (including Groovy rules) attached to a form, Smart Push, and right-click action menus, with the ability to use native Excel features such as cut, copy, paste, sort, or filter, giving users the flexibility of working with member combinations not present on the form. Using flex forms, you can rearrange row and column members and sort or move rows and columns. You can also open a flex form in ad hoc mode and use ad hoc analysis to modify the grid layout and submit data.

> **Note:**
>
> Flex forms are used only in Oracle Smart View for Office and not in the Oracle Enterprise Performance Management Cloud web interface.

To enable a form as a flex form and set flexible dimensions on columns, Service Administrator performs these tasks from the EPM Cloud web interface during form definition:

*   Under **Smart View Options** in the **Layout** tab, select the **Enable flex form for rows** and **Enable flex form for columns** check boxes, as you require. You may select one or both of these options.

*   Optionally, for individual rows or columns, in **Dimension Properties**, enable the **Flex beyond form definition** option, as you require. When this option is enabled for a row or column dimension, Smart View users may add row or column members to the flex form that are not included as part of the form definition.

For more information, see:

*   Designing Flex Forms in *Administering Planning*

*   Flex Forms in *Oracle Smart View for Office User's Guide*

Open Flex Forms from Task List

Applies to: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

You can now open flex forms from a task list as flex forms. Previously, flex forms would open as regular forms, if opened from a task list.

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

Member Information Available for EPM Cloud and Oracle Hyperion Planning

Applies to: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Oracle Hyperion Planning

You can now view detailed information about members from an Oracle Enterprise Performance Management Cloud or Oracle Hyperion Planning data provider. Previously, this ability was available only for Oracle Essbase and Oracle Hyperion Financial Management.

You can select a member cell and click **Cell Information** in the provider Ad Hoc ribbon; for example, in the Planning Ad Hoc ribbon. In the **Member Information** dialog box, you can view the details depending on the properties of the selected member. The details are grouped under various tabs such as **Information**, **Aliases**, **Attributes**, **Formula**, **Comments**, and **User Defined Attributes**.

> **Note:**
>
> - Only the tabs applicable to the selected member are displayed.
> - Member information is displayed only for member cells and not for data cells, unlike in Essbase.

For more information, see Member Information in the *Oracle Smart View for Office User's Guide* .

New Smart View Function Message

When working with Oracle Smart View for Office functions, such as HsGetValue or HsSetValue, a new message, "Cube Not Selected," will be shown when connected to a business process or server only through the application level. The user will need to connect to the cube in order to proceed.

In previous releases, a message did not display and Smart View repeatedly attempted to make the connection.

This message is displayed for all Smart View functions when connected only through the application level, with the exception of HsGetSheetInfo and HsGetConnectionInfo.

> **Note:**
>
> Oracle Hyperion Financial Management: You can continue to connect at the application level to use Smart View functions.

See the Functions chapter in the *Oracle Smart View for Office User's Guide* .

New Template for Creating Multi-Cube FreeForm Applications in Smart View

Starting in 22.03, a new Excel template workbook, `PlanningApplicationTemplate_FreeForm.xlsx`, allows you to create a multi-cube application for your EPM Cloud FreeForm business process from Oracle Smart View for Office.

FreeForm applications are not constrained by dimension requirements of standard applications. FreeForm applications can contain any combination of up to 12 ASO and BSO cubes. The FreeForm App creation template provides a starter example of dimensions that you can modify or delete to create cubes and dimensions for a FreeForm application.

The new multi-cube FreeForm template replaces the two previously available templates that allowed you to create only a single-cube FreeForm ASO or BSO application.

From the **Settings and Actions** menu in your business process, select **Downloads**, and then click **Download Application Templates** to obtain the complete set of templates, including the new FreeForm template. The zip file you download contains these templates:

- `PlanningApplicationTemplate_FreeForm.xlsx`—Creates a FreeForm application

- `PlanningApplicationTemplate.xlsx`—Creates a Planning application

- `PlanningApplicationTemplate_epbcs.xlsx`—Creates a Planning Modules application

- `PlanningApplicationTemplate_sample.xlsx`—Creates the Planning sample application, Sample

Open the `PlanningApplicationTemplate_FreeForm.xlsx` template in Smart View and modify the sheets according to your requirements.

Using the new downloadable FreeForm template workbook, you can quickly create, model, and manage a multi-cube application containing both ASO and BSO cubes in Smart View.

For more information, see:

- Using Smart View to Manage Applications in *Administering and Working with FreeForm*

- Using Smart View to Manage Applications in *Administering Planning*

New Suppression Option for Form-Based Ad Hoc Grids

Applies to: Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

A new form **Grid Properties** option, **Remove Form Suppressions in Ad Hoc**, allows Oracle Smart View for Office users to perform ad hoc on forms that have row and column suppression options selected in the form definition.

During form definition, the designer may select row or column suppression options, such as **Suppress missing data - Row**, **Suppress missing data - Columns**, or **Suppress missing blocks**. When these options are selected, a Smart View user can open a form that contains missing data and still see the form layout. But if the Smart

View user attempts to open the form as an ad hoc grid, and there is such data missing, no rows or columns may be displayed on the grid and an error is shown.

By selecting the new **Remove Form Suppressions in Ad Hoc** option during form design, Smart View users can still perform ad hoc analysis on a form that has suppression options specified. If there is missing data on the form, the base dimension members for the columns or rows are displayed on the ad hoc grid in Smart View. This allows Smart View users to continue ad hoc analysis on the form, even though suppression options were enabled in form design.

Smart View should note that the **Remove Form Suppressions in Ad Hoc** option does not override any suppression options you may have set in the Smart View **Options** dialog, **Data Options** tab. If the **Remove Form Suppressions in Ad Hoc** option is enabled for the form, and you see an error when performing ad hoc analysis on the form, then clear the suppression options in Smart View.

For more information setting this option in form design, see the topics on administering forms in the administration guide for your business process; for example, for Planning and Planning Modules, see Setting Form Grid Properties in *Administering Planning*.

Task Manager Extension for Smart View Now Supported for Planning and Planning Modules

The Task Manager extension is now supported for EPM Cloud Planning and Planning Modules business processes.

The Task Manager extension for Oracle Smart View for Office allows the management of Task Manager data to be performed from within the Excel interface. Task Manager helps you define, execute, and report on the interdependent activities of a business process.

Previously, the Task Manager extension was supported only for Financial Consolidation and Close and Tax Reporting.

Install the Task Manager extension for Smart View in either of two ways:

- From the **Downloads** page of your business process, download the SVEXT file to a temporary folder and double-click it.

- Use the **Check for Updates, New Installs, and Uninstalls** feature in the Smart View **Options** dialog, **Extensions** tab to automatically detect and install the Planning Admin Extension.

Once installed, launch Smart View and connect to your business process using this private connection syntax:

```
https://serviceURL/HyperionPlanning/cm/svp
```

Then perform your assigned Task Manager tasks in Smart View.

For further information, see:

- *Working with Oracle Smart View for Office:*
    - Creating Private Connections

- – Extensions, including Initially Checking for Available Extensions and Installing Extensions
- Administering Tasks with EPM Task Manager in *Administering Planning*
- Using Tasks with Task Manager in *Working with Planning*

Books Extension Features and Updates

Related Topics

- EPM Books 22.05 Extension Update
- EPM Books 22.04 Extension Update
- Books 22.02 Features and Updates

EPM Books 22.05 Extension Update

Applies to: Financial Consolidation and Close, FreeForm, Narrative Reporting, PlanningPlanning, Planning Modules, Tax Reporting

An updated EPM Books extension for Oracle Smart View for Office is now available to download and install. This update includes general improvements and bug fixes.

EPM Books 22.04 Extension Update

Applies to: Financial Consolidation and Close, FreeForm, Narrative Reporting, Planning, Planning Modules, Tax Reporting

An updated EPM Books extension for Oracle Smart View for Office is now available to download and install. This update includes general improvements and bug fixes.

Books 22.02 Features and Updates

Related Topics

- Alias Names Now Displayed in Select POV Dialog in Books Extension
- EPM Books 22.02 Extension Update

Alias Names Now Displayed in Select POV Dialog in Books Extension

Applies to: Financial Consolidation and Close, FreeForm, Narrative Reporting, Planning, Planning Modules, Tax Reporting

In the EPM Books Extension, alias names now display in the choice list in the **Select POV** dialog when changing the POV.

Whether you're changing the POV upon importing a Book, or changing the POV after a Book has been imported, if aliases are specified for dimensions in the report, you will see the member aliases in the drop-down selection list of the **Select POV** dialog.

For more information and examples, see the topics in Working with Books in *Oracle Smart View for Office User's Guide* .

EPM Books 22.02 Extension Update

Applies to: Financial Consolidation and Close, FreeForm, Narrative Reporting, Planning, Planning Modules, Tax Reporting

An updated EPM Books extension for Oracle Smart View for Office is now available to download and install. This update includes general improvements and bug fixes.

Additionally, this update includes support for aliases in the **Select POV** dialog, described in Alias Names Now Displayed in Select POV Dialog in Books Extension.

Narrative Reporting Features and Updates

Related Topics

- Narrative Reporting 22.06 Extension Update
- Narrative Reporting 22.04 Extension Update
- Narrative Reporting 22.02 Features and Updates

Narrative Reporting 22.06 Extension Update

An updated Narrative Reporting extension for Oracle Smart View for Office is now available to download and install. This update includes a change in access to the Reports commands when connected to Narrative Reporting, along with general improvements and bug fixes.

Following are the recommended combinations and functionality available with different Smart View versions (the current 21.200 version and the upcoming 22.100 version), Narrative Reporting extension versions, and Narrative Reporting server versions:

Table 1-1   Reports Support and Smart View, Narrative Reporting Extension, Narrative Reporting Server Versions

Smart View Version	Narrative Reporting Extension Version	Narrative Reporting Server Version	Notes
21.xxx	22.04	22.05/22.06	Narrative Reporting extension 22.06 moves the Reports import functionality to the Smart View ribbon in Smart View 22.100. Oracle recommends staying on the 22.04 extension until upgrading to Smart View 22.100

Table 1-1   (Cont.) Reports Support and Smart View, Narrative Reporting Extension, Narrative Reporting Server Versions

Smart View Version	Narrative Reporting Extension Version	Narrative Reporting Server Version	Notes
22.100	22.04	22.05	Using Smart View 22.100 with the 22.04 extension and 22.05 Narrative Reporting server is an unsupported combination
22.100 (Upcoming release)	22.06	22.06	This is the recommended combination

Narrative Reporting 22.04 Extension Update

An updated Narrative Reporting extension for Oracle Smart View for Office is now available to download and install. This update includes general improvements and bug fixes.

Narrative Reporting 22.02 Features and Updates

Related Topics

- Launch EPM Books Panel from Narrative Reporting Home in Smart View
- Narrative Reporting 22.02 Extension Update

Launch EPM Books Panel from Narrative Reporting Home in Smart View

You can now use the new Books shortcut in Narrative Reporting Home to access the EPM Books panel in Oracle Smart View for Office.

You must have installed the EPM Books extension for Smart View, and the Narrative Reporting extension 22.02+. The Books shortcut then appears as the last item in the Narrative Reporting Home panel.

Starting from Narrative Reporting Home, click **Books** to launch the EPM Books panel as described in Using Narrative Reporting Home in *Oracle Smart View for Office User's Guide* .

Narrative Reporting 22.02 Extension Update

An updated Narrative Reporting extension for Oracle Smart View for Office is now available to download and install. This update includes general improvements and bug fixes.

Additionally, after installation and connection, the **Books** shortcut now appears in the Narrative Reporting Home panel, described in Launch EPM Books Panel from Narrative Reporting Home in Smart View .

Installation Information

You can download this release from My Oracle Support:

https://support.oracle.com

For information on Oracle Smart View for Office, including the link to downloading the latest Smart View release, refer to the My Oracle Support Knowledge Article "Smart View Support Matrix and Compatibility FAQ" (Doc ID 1923582.1). To access the Knowledge Article, you must have a user account with My Oracle Support.

As a best practice, Oracle recommends periodically checking for and downloading the latest Smart View release from the Knowledge Article, Doc ID 1923582.1, on MOS:

https://support.oracle.com/epmos/faces/DocumentDisplay?id=1923582.1

Complete installation instructions are in the *Oracle Smart View for Office Installation and Configuration Guide* . This guide is available in the Smart View 21.200 library on the Oracle Help Center.

https://docs.oracle.com/en/applications/enterprise-performance-management/index.html

Google Chrome, Mozilla Firefox, and Microsoft Edge require a browser extension. See the topics in Browser Support for information on downloading and installing the Smart View extension for those browsers.

Supported Platforms

Related Topics

- Smart View Version Support
- Microsoft Windows Operating System and .NET Support
- Microsoft Office Support
- Browser Support
- Smart View and Virtualized Environments
- Mobile Device Support

Smart View Version Support

Oracle supports and certifies the current release and one release prior (21.200 and 21.100) of Oracle Smart View for Office against current products on Premier Support.

Microsoft Windows Operating System and .NET Support

Oracle Smart View for Office 21.200 is supported on Windows 10 and 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.

Microsoft Office Support

Related Topics

* Microsoft Office 2013, 2016, and 2019
* Microsoft Office 365

Microsoft Office 2013, 2016, and 2019

Oracle Smart View for Office supports Microsoft Office 2013, 2016, and 2019.

Microsoft Office 365

Smart View for Windows requires locally installed supported versions of Microsoft Office 365 applications, including Office 365 ProPlus installed using Click-to-Run. Smart View (Mac and Browser) provides an interface between Oracle's EPM Cloud solutions and Microsoft Office 365 deployed either in a web browser on Windows or Mac systems, or on Office for Mac.

For more information, see the Knowledge Article entitled *Smart View Support Matrix and Compatibility FAQ (Doc ID 1923582.1)*:

https://support.oracle.com/epmos/faces/DocumentDisplay?id=1923582.1

Browser Support

Related Topics

* Browser Add-ons
* Browser Version Support
* Microsoft Edge WebView2 Support

Browser Add-ons

You can use Oracle Smart View for Office to interact with supported browser-based applications in Oracle Enterprise Performance Management Cloud and Oracle Enterprise Performance Management System in these 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.
* Starting in a Task List in Smart View, opening a task in a browser.

Mozilla Firefox, Google Chrome, and Microsoft Edge require a Smart View add-on for drill-through, web launch, and opening a task in a browser from Smart View.

Browser extension installation instructions are in the *Oracle Smart View for Office Installation and Configuration Guide* , Installing Browser Add-ons. This guide is available in the Smart View 21.200 library on the Oracle Help Center.

https://docs.oracle.com/en/applications/enterprise-performance-management/index.html

> **Note:**
>
> **Microsoft Internet Explorer:** Starting with the EPM Cloud 20.09 update and EPM System 11.2.2 release, Internet Explorer 11 is no longer supported, based on the Microsoft recommendation that Internet Explorer users move to the new Microsoft Edge as their default browser. Because Oracle will no longer test EPM Cloud and EPM System using Internet Explorer, existing functionality that currently works with Internet Explorer may no longer work starting with the 20.09 update or release 11.2.2. For more information, see Browser Version Support.
>
> Oracle recommends that you move all users to a supported browser.

Browser Version Support

For your platforms and products, check the system requirements and supported platforms documents, and specific product readmes for any additional browser support requirements.

> **Note:**
>
> 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.

Smart View and Virtualized Environments

Oracle does not certify Oracle Smart View for Office with virtualized environments formally. Virtualized environments are not supported by Smart View on an official basis.

> **✎ Note:**
>
> Virtualized environments can also be referred to as virtualized desktop integration (VDI) products.

For more information, see the My Oracle Support Knowledge Article "Support for Oracle's Hyperion Products in 3rd Party Virtualized Environments" (Doc ID 588303.1).

Mobile Device Support

Oracle Smart View for Office is supported on Microsoft Surface Pro tablets only. Smart View is not supported on any other tablet or smartphone.

Supported Languages

The Oracle Smart View for Office user interface supports these languages:

Language	Language	Language	Language
Arabic	Finnish	Italian	Romanian
Chinese (Simplified)	French	Japanese	Russian
Chinese (Traditional)	French (Canada)	Korean	Slovak
Czech	German	Norwegian	Spanish
Danish	Greek	Polish	Swedish
Dutch	Hebrew	Portuguese (Brazilian)	Thai
English	Hungarian	Portuguese (Portugal)	Turkish

Supported Paths to this Release

You can upgrade to Oracle Smart View for Office Release 21.200 from the following releases:

Table 1-2   Supported Paths to this Release

Release Upgrade Path From	To
11.1.2.5.xxx	21.200
20.xxx	21.200
21.xxx	21.200

Backward Compatibility

Oracle Smart View for Office supports the product versions listed in the system requirements and platform support documents for your environment.

For information about compatibility with other Oracle platforms and products, check the system requirements and supported platforms documents for your environment, as well as any specific product readmes.

Defects Fixed in This Release

Related Topics

- About Defects Fixed in This Release
- General
- EPM Cloud
- Essbase, Oracle Analytics Cloud - Essbase
- Financial Management

- Narrative Reporting
- Oracle Hyperion Planning

About Defects Fixed in This Release

The topics in this section include defects fixed in Release 21.200. To review the list of defects fixed between earlier releases, use the Defects Fixed Finder This tool enables you to identify the products you own and your current implementation release. With a single click, the tool quickly produces a customized report of fixed-defect descriptions with their associated platforms and patch numbers. This tool is available here:

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

General

- 31786529, 33330545, and 33300702 – Reports now open properly from a task list in Smart View, instead of getting redirected to the web application. This is resolved by launching the task list URL as a GET call, instead of a POST call. If you require the task list URL to be launched as POST, you can remove or comment the `<tasklistURLLaunch>GET</tasklistURLLaunch>` property in the `properties.xml` file present in the default installation location at `C:\Oracle\SmartView\cfg`. For more information, see Configuring the Opening of Reports from Task List in *Oracle Smart View for Office User's Guide* .

- 33009616 – After updating a connection in the **Manage URL Mappings** dialog, the **Server** property in the **Sheet Information** dialog now correctly references the server listed in the URL.

- 33052633 – In the **Private Connections** text box, the Quick Connect URL can now be entered properly, without facing the keypress issue in which extra characters were getting added automatically while typing or pasting the link.

- 33220568 – Fixed an issue with Kerberos setup where Ping Access fails to connect on the first try, but successfully connects on the second.

- 33542458 – When data is copied and pasted or manually entered from one workbook to another and then the latter is submitted, unwanted formula and corrupt data values are no longer getting added to the database during the submission.

EPM Cloud

- 32321045 – The current logged-in user is now able to correctly filter on "My Planning Units" details.

- 32893875 – When the Smart View Member option, **Flex Forms: Preserve Grid on POV and User Variable changes** is selected, and the form has a user variable or dynamic user variable dimension member on a flexible row or column, the **Flex beyond form definition** option should be selected for the applicable row or column in the form definition. If either of these options are not selected, the error message, "Invalid member on <dimension name> dimension" is displayed when changing a user variable member in the POV.

- 33206892 – Smart List labels are displayed properly in a form when a saved form with Smart Lists is re-opened and refreshed.

- 33306503 – In the Oracle Enterprise Performance Management Cloud provider Ad Hoc ribbon (for example, the Planning Ad Hoc ribbon), all six Zoom In options (except Formulas) are now available, even after switching the connection between on-premises Oracle Essbase and EPM Cloud worksheets.

- 33365601 – When connected to Standard mode applications, indentation works for column headers when the Smart View Member Option, **Use Excel Indentation (Ad Hoc Standard Mode)** is checked. This option is located in the Smart View **Options** dialog, **Member Options** tab.

- 33529599 – Changing the alias table no longer results in a "POV input is inconsistent with the grid" error in saved workbooks even if the **No Data / Missing** option under **Suppress Rows** (**Options** dialog, **Data Options** tab) is enabled.

- 33540241 – Manually entering a member name, or searching and selecting it in the drop-down member selector list now adds the member correctly when data is submitted.

Essbase, Oracle Analytics Cloud - Essbase

32836818 – From a Smart Query sheet, when an Analyze is performed and a new ad hoc sheet is created, the "Repeated Members" option selection (checked or unchecked) is honored in the new sheet. The Repeated Members option is located in the Options dialog, Data Options tab, under Suppress Rows.

Financial Management

- 33123076 – The HypGetDimMbrsForDataCell function no longer shows blank POV members when a Oracle Hyperion Financial Management form shows no members in Smart View due to the suppression of row headers. Instead, if a description is an empty string, the stored member name is returned.

- 33333758 – Using the Oracle Journals extension with Financial Management, formatting in journal rows now displays correctly.

Narrative Reporting

- 32988757 – Review instances, especially from large report packages, now open properly without delay due to performance improvements in the Comments feature.

- 34040879 – Server-initiated refresh now correctly refreshes workbooks containing formula references to other worksheets in the workbook. When performing a server-initiated refresh, the process first refreshes data on all selected worksheets in the workbook, then runs Excel formula calculations on all selected worksheets.

Oracle Hyperion Planning

32409509 – For Oracle Hyperion Planning data sources, drill-through reports can be launched only in a web browser, and not in a new Microsoft Excel sheet. This launch

behavior can be defaulted to the web browser and the selection of **Drill-Through Launch** method in the **Advanced** tab of **Options** dialog can be disabled. To do so, open the `properties.xml` file, located in the installation folder at `C:\Oracle\SmartView\cfg`, and change the `disableDTLaunchType` property from `0` to `1` so that it appears as `<disableDTLaunchType>1</disableDTLaunchType>`. After saving this change, restart Excel. For more information, see Defaulting and Disabling Launch Method for Drill-Through Reports in *Oracle Smart View for Office User's Guide* .

Known Issues

Related Topics

- General

- EPM Cloud

- Financial Management

- Narrative Reporting

- Oracle BI EE, Oracle Analytics Cloud

General

21810748 -- In Excel, copying a sheet containing a POV or slider to another sheet in the workbook results in an error.

EPM Cloud

> **Note:**
>
> Unless otherwise noted, the known issues described in this "EPM Cloud Known Issues" section apply to these Oracle Enterprise Performance Management Cloud services:
>
> - Planning
>
> - Planning Modules, including Strategic Modeling
>
> - Financial Consolidation and Close
>
> - Tax Reporting

EPM Cloud Known Issues

- 28891270 -- When using the HsSetValue function to send a Smart List value and then submitting the value, a numeric value is displayed after refresh instead of the Smart List value that was submitted.

- 28891346 -- When using the HsSetValue function to send a date value and then submitting the value, the date displays in a different format after refresh.

- 30447730 -- If the **Repeat Member Labels** option is enabled on the provider server, and the **Repeat Member Labels** option is disabled in Oracle Smart View for Office, then, after a submit, users will see the member labels displayed per the setting in Smart View (that is, non-repeating member labels, or merged cells). This is not correct behavior as Smart View should always honor the provider setting when **Repeat Member Labels** is selected in the provider.

- 31990195 -- In Smart View, while working with a form that has an Excel filter applied to a column containing dates, users were unable to refresh or submit data. This occurs when selecting Date filters using the check boxes. Instead, you should select a filter from the extended right-click menu or create a custom filter.

  This issue may be fixed in a future version of Microsoft Office. Until then, Oracle recommends that you do not use check boxes to apply filters to columns containing dates. If you use check boxes to apply filters to a column containing dates, Smart View will remove the filter upon refreshing or submitting data, so that the operation can proceed as expected.

  Note that when using check boxes to apply Excel filters to other columns which do not contain dates, users can refresh or submit data as expected.

Financial Management

27474347 -- In some cases, when searching for an Entity dimension member in **Member Selection**, the Entity dimension is highlighted instead of the searched-for member.

Narrative Reporting

- 31507088 – After importing a Report and performing an **Analyze** on one of the reports, the ribbon focus in the ad hoc grid sheet remains on the Narrative Reporting ribbon.

  Workaround: To access the Narrative Reporting Ad Hoc ribbon, switch between another worksheet tab of the workbook and then back to the ad hoc grid sheet for the correct ribbon to come into focus; or, select the Narrative Reporting Ad Hoc tab in the ad hoc grid sheet.

- 33703443 – In the main node of the Library tree in Narrative Reporting Home, you may see the text string, "EPRCS," instead of " Narrative Reporting " in the following cases:

  – If 21.200 is the first release of Oracle Smart View for Office that you have used.

  – If you have used previous releases of Smart View, but never made a connection to Narrative Reporting.

  You can continue to use Narrative Reporting without issues with the "EPRCS" string displayed in the Library tree in Smart View.

  Or, if you prefer to see the " Narrative Reporting " string in the tree, add an entry to the `properties.xml` file located in the `AppData` folder on your local machine as follows:

  1. Open the `properties.xml` file located in:

```
C:\Users\<username>\AppData\Roaming\Oracle\SmartView
```

2. Add the following line just before the closing `</cfg>` tag:

```
<nameMap>Narrative Reporting</nameMap>
```

For example:

```
<cfg>
...
<nameMap>Narrative Reporting</nameMap>
</cfg>
```

3. Save the `properties.xml` file and restart Office.

   After restarting Office, you should see the " Narrative Reporting " string displayed in the Library tree in Narrative Reporting Home.

- 34038948 – When attempting to create a static variable, a Microsoft .NET Framework error message may display. This can occur when older .NET versions are installed on your machine.

  Oracle recommends upgrading to the 4.8 or later version of .NET. See Microsoft Windows Operating System and .NET Support for more information.

Oracle BI EE, Oracle Analytics Cloud

31908484 -- After inserting a table into PowerPoint and saving the file with a .ppt extension, then double-clicking the file to reopen it, refresh does not work from either the Smart View ribbon or Oracle BI EE ribbon.

Tips and Troubleshooting

Tips and troubleshooting topics are listed in the Tips and Troubleshooting chapter of the *Oracle Smart View for Office Installation and Configuration Guide* .

All Oracle Smart View for Office 21.200 guides are available in the library on the Oracle Help Center:

https://docs.oracle.com/en/applications/enterprise-performance-management/index.html

Documentation Updates

Related Topics

- Accessing EPM Cloud and EPM System Product Documentation
- Copying and Pasting Code Snippets from PDFs

Accessing EPM Cloud and EPM System Product Documentation

Find the latest Oracle Enterprise Performance Management Cloud and Oracle Enterprise Performance Management System product guides in the Oracle Help Center:

https://docs.oracle.com/en/

EPM Cloud

For EPM Cloud documentation and videos on the Oracle Help Center, click the **Cloud** icon, then **Applications**. On the Application Services page, click the link for your service in the **Enterprise Performance Management** group.

EPM System

For EPM System product guides to view or download, click the **Applications** icon on the Oracle Help Center. On the Oracle Applications page, select **Enterprise Performance Management**, and then look for your release on the Enterprise Performance Management page.

You can also find deployment-related documentation on the Oracle Technology Network (http://www.oracle.com/technetwork/index.html) and on the Oracle Software Delivery Cloud website (http://edelivery.oracle.com/EPD/WelcomePage/get_form).

Copying and Pasting Code Snippets from PDFs

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

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

Third-Party Components

This topic lists the open-source and proprietary third-party software components (or portions thereof) that are included with or used by Oracle Smart View for Office:

- MSXML 6.0
- NewtonSoft.Json 12.0.3
- Office PIA 14.0
- InstallShield 2019
- Open XML SDK 2.12.1
- Zlib Data Compression Library 1.2.11