Oracle® Smart View for Office

Readme

Release 22.100

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Smart View 22.100 Readme

Related Topics

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- New Features in Release 22.100

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Purpose

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

New Features in Release 22.100

Related Topics

- Show and Hide Documents Folder in EPM Cloud Library

- Enhanced Reports Functionality in Smart View

- WebView2 and Edge Support for Importing Financial Reporting Documents in Smart View

- Set and Export Default Options in Smart View Options Dialog

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Show and Hide Documents Folder in EPM Cloud Library

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

Service Administrators can now show or hide the **Documents** folder in the library when they enable or disable the **Save** and **Save As** options in the Smart View ribbon for users.

The **Save** and **Save As** options help users to save Office documents (Word, Excel, and PowerPoint files) to the library in EPM Cloud. This facilitates saving files in a central location, downloading them from the library, and sharing them easily with other users. Users need to create folders under the **Documents** folder in the library for uploading and saving their files.

The ability to save Office documents to the EPM Cloud Library is available for Service Administrator and Power User roles and is enabled by default in Smart View. Service Administrators can disable it by setting the `enableLibrary` property to `0` in the Smart View `properties.xml` file, located in `C:\Oracle\SmartView\cfg`. Once this property is disabled:

- In the Smart View Panel, the **Documents** folder in the library is hidden and cannot be seen or accessed by users.

- In the Smart View ribbon, the **Save** and **Save As** options are removed and cannot be used to save Office documents to EPM Cloud.

For more information, see Saving Office Documents to EPM Cloud in the *Oracle Smart View for Office User's Guide* .

Enhanced Reports Functionality in Smart View

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close FreeForm, Narrative Reporting, Planning, Planning Modules, Tax Reporting

This release adds two enhancements to the Reports features of Oracle Smart View for Office.

- **Create an ad hoc grid based on an imported report.**

  Use the **Import Formatted Report** command (formerly the **Open** command) to import a fully formatted report onto a sheet. Then, to create an ad hoc grid from the imported report grid or chart, select a cell inside the grid or select the chart image and, in the **Reports** group in the Smart View ribbon, click **Analyze**. In a sheet containing multiple reports, select one report, and then click **Analyze**.

  The ad hoc grid is launched in a separate worksheet.

  > **Note:**
  >
  > Starting in this release, the **Open** command is renamed to **Import Formatted Report**.

- **View properties for a report.**

  Select the report in the Reports node of the tree in the Smart View Panel, and then right-click and select **Properties**.

  Alternatively, right-click a report in the tree and select **Properties**.

  The **Report Properties** dialog is displayed. You can view the report name, location, description, and the report modification history.

  > **Note:**
  >
  > The **Properties** command is only available for reports; it is not available for grids.

For more information on working with Reports in Smart View, see Reports in the EPM Cloud Platform.

WebView2 and Edge Support for Importing Financial Reporting Documents in Smart View

Applies to: Oracle Hyperion Financial Reporting Cloud and On-Premises

Oracle Smart View for Office now takes advantage of Microsoft Edge WebView2 and the Edge browser when importing Financial Reporting documents in Smart View (Microsoft Excel, Word, or PowerPoint).

During import, a preview of the document is displayed in a wizard. Previously, Microsoft Internet Explorer was used to display the wizard.

To check that WebView2 Runtime is enabled for use by Smart View, go to the **Health Check** dialog, and verify the following:

- In **Version Information**, a line for **WebView2 Runtime Version** exists and a supported version is displayed. Only WebView2 versions 86.0.616.0 and later are supported.

- In the **Smart View Options** group, the entry for **WebView2 Runtime** is set to **Enabled**

Additionally, verify that the Edge browser is installed. If not already installed, follow your established procedures for acquiring and installing it.

For more information, see:

- Performing a Health Check On Your System to verify and set the WebView2 option in the **Health Check** dialog

- Importing Financial Reporting Documents

Set and Export Default Options in Smart View Options Dialog

Applies to: All

As a service administrator, you can now configure default Smart View options and roll them out to users installing Oracle Smart View for Office. With this ability, you can ensure consistent application of Smart View configurations across users in your organization. You can export options present under the **Member Options**, **Data Options**, **Advanced**, and **Formatting** tabs available in the **Options** dialog.

> ✏️ **Note:**
>
> The following options cannot be exported:
>
> - All options under **Cell Styles** tab and **Extensions** tab
> - Following options under **Advanced** tab:
>   - Shared Connections URL
>   - Log Message Display
>   - Show Diagnostics Group on Smart View Ribbon
>   - Disable Smart View in Outlook
>   - Reduce Excel File Size
>   - Improve Metadata Storage
> - The **Member Display Name** option under **Member Options** tab

To set and export default Smart View options, open the **Options** dialog from the Smart View ribbon and set the required options. Once done, expand the list under **OK** and select **Export Options**.

The exported options are stored in an `options.xml` file at `<Smart View Install>/cfg` folder (for example, `C:\Oracle\SmartView\cfg`). You can distribute this file to your users, so that they can get the default options you set when they use Smart View.

As a user, you must have the `options.xml` file present in their **cfg** at `<Smart View Install>/cfg` at the time of launching Smart View for the first time. However, if you have already launched Smart View before your service administrator distributes the `options.xml` file, then you have the alternative to reset your options and use the default ones provided by the service administrator.

To reset existing Smart View options and use the default options, open the **Options** dialog from the Smart View ribbon and click **Reset**. Close the Office application and reopen it to see the default options set in the **Options** dialog.

> **✎ Note:**
>
> Oracle recommends that you not modify the options from the `options.xml` file, as it can result in errors and mismatches. Manual modifications to the `options.xml` file are not supported. You should continue using the **Options** dialog for making any changes.

For more information, see:

- [Exporting Default Smart View Options](#) in *Oracle Smart View for Office Installation and Configuration Guide*
- [Sheet Options](#) in *Oracle Smart View for Office User's Guide*

New Cell Styles for Parent and Child Members

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting, Oracle Hyperion Planning (on-premises)

You can now set cell styles for parent and child member cells in forms and ad hoc grids. This is in addition to the existing ability to set cell styles for members. The Planning Admin Extension also supports cell styles when editing dimensions. You can now highlight the parent and child members within the member hierarchy by assigning them different formatting such as a font style, a background color, and a border color.

Cell styles are set in the **Options** dialog under the **Cell Styles** tab. To set the parent and child styles, expand the **Member cells** group, and select the check boxes next to **Parent** and **Child** cell types. To change their default style, right-click the cell type and set the required formatting. Click **Refresh** to see the newly set cell styles in the form or ad hoc grid.

The cell styles are displayed based on the order of precedence and selected cell styles. You can enable these styles in following ways:

- Deselect the check box for **Members** cell type and select the **Parent** and **Child** cell types. This will remove formatting from blank member cells also.
- Keep the check box for **Members** cell type selected. Move the **Parent** and **Child** cell types above the **Members** cell type to set the priority of cell styles.

Consider the following guidelines while using cell styles.

- The precedence overrides the conflicting styles but continues to preserve and display non-conflicting styles. For example, you have set the Parent and Child cell types in a higher order of precedence, that is moved them above the Member cell type. Now, if you set the border colors for parent and child cell types and the background color for member cell type, the parent and child cells will display the border colors and also the background colors set for member cell type, since these are two different styles that do not conflict with each other.

- If a root level dimension does not have any children or none of its children are enabled in the provider application cube, then it is considered as a child member and the Child cell style is applied to it.

- There is a difference between how parent and child cell styles are displayed in forms and ad hoc grids.

  - In forms, the members for which the Start Expand property is enabled in the provider application are considered as parents and the cells under them are their children. So the Parent cell style is applied to such expandable members. Since forms have a static layout and cannot be zoomed into, the parent cells which are not expandable and do not have any children enabled are not displayed in the Parent cell style. Instead, such cells are indicated with the Member or Child cell style, as they are appear at the lowest level.

  - In ad hoc, the hierarchy set in the outline is followed and you can zoom in and out to see all the parent and child members. So the Parent and Child cell styles appear properly based on the outline. If a member is both a parent and a child, then the Parent cell style is applied to it.

  For example, Expense and Revenue are parent member cells under Account, such that Expense is set as expandable, while Revenue is not. Expense has Utilities and Rent as children, which are enabled in the form. Revenue has Salary and Commission as children, which are not enabled in the form. When you set cell styles and refresh the form, the Parent cell style is applied to Account and Expense but not to Revenue, since only expandable members and members with children enabled are considered as parents. As Revenue is at the lowest level, it is indicated with Child cell style. Now if you open it in ad hoc, both Expense and Revenue members are indicated with Parent cell styles, since both can be zoomed into to reveal their respective children.

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

New Health Check Item for Microsoft .NET Version

A new item in the Health Check dialog, **.NET Framework Versions**, gives you information about the Microsoft .NET Framework version used by Oracle Smart View for Office.

The **.NET Framework Versions** item is listed in the **Version Information** section and provides this information:

- The **Details** column displays all .NET versions currently installed on the machine.

- The **Fix/Update/Info** column displays the .NET version used by Smart View

In general, Oracle recommends that the latest version of .NET is installed for use with Smart View. To help you to keep your system up-to-date, use the **Health Check** dialog to verify your .NET version.

You access the **Health Check** dialog from the Smart View ribbon. Select **Help**, and then **Health Check**. In the **Version Information** section, view the **.NET Framework Versions** item for information on the .NET versions installed on your machine.

See Microsoft Windows Operating System and .NET Support for information on Smart View .NET requirements.

Suppress Repeated Members Now Supported in Standard Mode Ad Hoc Grids

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax ReportingTax Reporting

You can now suppress repeated members in Oracle Smart View for Office ad hoc grids when connected to Standard-mode applications.

Grids can contain members that are repeated on multiple rows. To simplify the view and improve readability for users, these repeated members can be suppressed in ad hoc grids when connected to Standard-mode applications.

Previously, suppressing repeated members was only supported when connected to Native mode applications.

To use the **Repeated Members** suppression option for Smart View users working with ad hoc grids, Service Administrators set the application option, **Smart View Ad Hoc Behavior**, to **Standard**.

All new and recreated applications are automatically set to Standard.

> **✏ Note:**
>
> Suppressing repeated members is supported with Standard-mode applications in Oracle Enterprise Performance Management Cloud 22.08+.

In Smart View, to suppress repeated members in ad hoc grids:

1. Open an ad hoc grid with repeated members.

2. In the Smart View ribbon, click **Options**, and then select the **Data Options** tab.

3. In the **Suppress Rows** section, select the **Repeated Members** check box, and then click **OK**.

4. In the Smart View ribbon, click **Refresh**. The repeated members are no longer seen in the ad hoc grid.

For information on setting the **Smart View Ad Hoc Behavior** option, see:

- Enterprise Profitability and Cost Management: System Settings in *Administering and Working with Enterprise Profitability and Cost Management*

- Financial Consolidation and Close: Specifying Application Settings in*Administering Financial Consolidation and Close*

- FreeForm: What Application and System Settings Can I Specify? in *Administering and Working with FreeForm*

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

- Tax Reporting: Specifying Application Settings in *Administering Tax Reporting*

For information on suppressing repeated members in Smart View, see Data Options in the *Oracle Smart View for Office User's Guide*.

Display Member Names and Aliases in Separate Columns in Standard Mode Ad Hoc Grids

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax ReportingTax Reporting

A new member display option in Oracle Smart View for Office, **Member Name and Alias**, allows you to display both the member names and their aliases in separate columns on row dimensions in ad hoc grids when connected to a Standard-mode application.

Aliases are alternate names for database members. You can create ad hoc grids that use the database member name, which is often a stock number or product code, and also display the member's alias name, which can be more descriptive than the member name, in your ad hoc worksheet.

For example, in the Vision database, the alias name for the Product member P_110 is Sentinal Standard Notebook. By selecting the **Member Name and Alias** option in Smart View, you can display both the P_110 member name and the Sentinal Standard Note alias, on the same row in two columns in your ad hoc grid. At a quick glance, you can view the product code along with the product name, side by side in two columns along the row dimensions.

Additionally, side-by-side display of member names and aliases is a common feature in Essbase ad hoc, which helps in migrating worksheets maintained in Essbase into the FreeForm business process in Oracle Enterprise Performance Management Cloud.

> **Note:**
>
> The **Member Name and Alias** option is supported only with Standard-mode applications in EPM Cloud 22.08+.

To enable the **Member Name and Alias** option for Smart View users working with ad hoc grids, Service Administrators set the application option, **Smart View Ad Hoc Behavior**, to **Standard**.

All new and recreated applications are automatically set to **Standard**.

In Smart View, to display both member names and their aliases in an ad hoc grid:

1. Place an ad hoc grid on a worksheet. You may have more than one row dimension in the grid.

2. In the Smart View ribbon, select **Options**.

3. In the **Member Options** tab, **Member Name Display**, select **Member Name and Alias**, then click **OK**.

4. In either the Smart View ribbon or the provider Ad Hoc ribbon, click **Refresh**.

    For row members, both member names and their corresponding aliases are displayed in the ad hoc grid.

For information on setting the **Smart View Ad Hoc Behavior** option, see:

*   Enterprise Profitability and Cost Management: System Settings in *Administering and Working with Enterprise Profitability and Cost Management*

*   Financial Consolidation and Close: Specifying Application Settings in *Administering Financial Consolidation and Close*

*   FreeForm: What Application and System Settings Can I Specify? in *Administering and Working with FreeForm*

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

*   Tax Reporting: Specifying Application Settings in *Administering Tax Reporting*

For information on displaying member names and aliases in an ad hoc grid, see these topics in the *Oracle Smart View for Office User's Guide*:

*   Member Options
*   Displaying Member Names and Their Aliases in the Grid

Support for New EPM Cloud Business Process: Enterprise Profitability and Cost Management

Starting with the 22.100 release, Oracle Smart View for Office extends support to Enterprise Profitability and Cost Management, the new Oracle Enterprise Performance Management Cloud business process introduced in the 22.06 update.

Enterprise Profitability and Cost Management is an analytic software tool that manages the cost and revenue allocations that are necessary to compute profitability for a business segment, such as a product, customer, region, or branch.Smart View

Using forms and ad hoc grids in Smart View, you can work with data from Enterprise Profitability and Cost Management in familiar Microsoft Office applications—Excel, Word, and PowerPoint. You can also import Reports directly in Office with Smart View.

> **Note:**
>
> Tasks Lists are not supported in the initial release of Enterprise Profitability and Cost Management. Look for Task List support in a future update.

For more information on Enterprise Profitability and Cost Management, see the Enterprise Profitability and Cost Management pages on the Oracle Help Center. https://docs.oracle.com/en/cloud/saas/enterprise-profitability-cost-management-cloud/books.html.

For more information on Smart View, see *Working with Oracle Smart View for Office* .

Changes to Planning Admin Extension Installation and Update Process

The installation process and file format for the Planning Admin Extension for Oracle Smart View for Office has changed to take advantage of the Smart View extension installation and update process.

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting

The Planning Admin Extension allows Service Administrators to quickly import and edit dimension and member metadata directly in Smart View.

> **Note:**
>
> The Planning Admin Extension is also referred to as the Smart View Add-on for Administrator or Admin Extension.

Previously, to install the Planning Admin Extension, an MSI file was downloaded from the Downloads page of the supported business process, and then installed using an installation wizard. Now the Planning Admin Extension is in SVEXT format, which allows it take part in the extension installation and update process available in Smart View.

To use the new SVEXT file format, you are required to first uninstall the MSI version of the Planning Admin Extension using Windows Programs and Features.

After uninstalling the MSI version, then you can install the new Planning Admin Extension in SVEXT format in either of these ways:

- From the business process **Downloads** page, download the SVEXT, and then double-click the SVEXT file.

- From the Smart View **Options** dialog, **Extensions** tab, click **Check for Updates, New Installs, and Uninstalls**, then follow the prompts to download and install the Planning Admin Extension.

Once the SVEXT is installed, you can always click the **Check for Updates, New Installs, and Uninstalls** to check for any updates, following the extension update process outlined in *Working with Oracle Smart View for Office*. You can also continue to use the Admin Extension download from the **Downloads** page of your business process. Note, however, that the only way to remove the Admin Extension, or to know whether an updated version of the Admin Extension is available, is by using the extension update process in Smart View.

> **✎ Note:**
>
> - You must uninstall the MSI version of the Planning Admin Extension before installing the SVEXT version. If you keep the MSI version on your machine, the Smart View extension update process will not recognize updates to the SVEXT version of the Planning Admin Extension.
>
> - You may continue to use the MSI version of the Planning Admin Extension that you previously installed. However, this version of the extension will not be updated in the future so will not contain any future bug fixes or enhancements. For this reason, Oracle recommends moving to the Planning Admin Extension in SVEXT format.

For more information, see:

- Using Smart View to Import and Edit Application Metadata in *Administering Planning*
- Installing Extensions in *Working with Oracle Smart View for Office*

Moving the Planning Admin Extension to the SVEXT format allows users to regularly check for and install updated versions of the extension directly in Smart View.

Smart View SVEXT Extensions Now Downloadable from Firefox

Applies to: Account Reconciliation, Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting Planning, Planning Modules, Tax ReportingTax Reporting

Using Mozilla Firefox, you can now download Oracle Smart View for Office extensions (SVEXT files) from the **Downloads** page of your business process.

For example, you can now use Firefox to download the Planning Admin Extension (also referred to as the Admin Extension) or Task Manager extension directly from the **Downloads** page.

Once downloaded, double-click the SVEXT file to install it. Then, start (or restart) your Microsoft office application (Excel, Word, or PowerPoint). View the newly installed in the Smart View **Options** dialog, **Extensions** tab.

Most Smart View extensions have the SVEXT file extension. Previously, when attempting to download an SVEXT extension from a business process **Downloads** page, Firefox did not allow opening or saving the extension. Instead, it opened a new tab showing binary data. You were required to use an alternative supported browser to

download SVEXT extensions. Starting in Oracle Enterprise Performance Management Cloud 22.08, there is no longer any issue with downloading Smart View SVEXT extensions from Firefox.

> **✏ Note:**
>
> - Smart View extensions (SVEXT files) are now downloadable from all supported browsers.
> - The Strategic Modeling extension for Smart View was not affected by this Firefox issue because that extension is an EXE file.
> - Smart View SVEXT extensions can also be downloaded using the extension download and update process in Smart View, using the **Extensions** tab in the Smart View **Options** dialog.

For information on installing extensions, see:

- Downloading and Installing Clients in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*
- Downloading and Installing Clients in *Getting Started with Oracle Enterprise Performance Management Cloud for Users*
- Installing Extensions in *Oracle Smart View for Office User's Guide*

Increased Limit to Save Office Documents to EPM Cloud Library from Smart View

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close FreeForm, Planning, Planning Modules, Tax Reporting

When you save Microsoft Office files to the EPM Cloud Library from Oracle Smart View for Office, you can now upload files that are up to 20 MB in size. Previously, you could upload files only up to 5 MB.

You can save Microsoft Office documents (Word, Excel, and PowerPoint files) to the EPM Cloud Library. Storing files in the EPM Cloud Library gives you an option for saving files in a central location and facilitates sharing documents with other users.

Any Word, Excel, and PowerPoint file that is up to 20 MB can now be saved to the EPM Cloud Library from Smart View. This enables you to upload, save, and share Office files of larger sizes.

To upload and save Office documents to the EPM Cloud Library, first you need to create a folder under the **Documents** folder in the Smart View panel. You can then use the **Save** or **Save As** option to upload and save your documents to the EPM Cloud Library. If you are not already connected, you will be prompted to sign in to an EPM Cloud business process while saving.

> **📝 Note:**
>
> - You will not be able to save Microsoft Office files that exceed 20 MB.
>
> - The size limit to upload PDFs remains the same at 100 MB.
>
> - There is no size limit for saving Narrative Reporting reports to the EPM Cloud Library.

For more information, see Saving Office Documents to EPM Cloud in the *Oracle Smart View for Office User's Guide* .

Narrative Reporting Features and Updates

Related Topics

- Narrative Reporting 22.09 Features and Updates
- Narrative Reporting 22.06 Features and Updates

Narrative Reporting 22.09 Features and Updates

Related Topics

- Support for Linked Regular Doclets
- Narrative Reporting 22.09 Extension Update

Support for Linked Regular Doclets

In Narrative Reporting, linked regular doclets enable you to easily share common library documents across multiple report packages.

Documents stored in folders in the Narrative Reporting library can be added to report packages as linked regular doclets. A linked regular doclet maintains a persistent link to the library document. When the library document is updated, Narrative Reporting automatically updates all doclets linked to the library document. Narrative Reporting continues to update the doclet file until the doclet link is deactivated.

Linked regular doclets are an easy way to ensure the consistency of common content across report packages.

> **Note:**
>
> - Linked doclets are applicable to regular doclets only.
> - Linked regular doclets are not supported for reference doclets and supplemental doclets.
> - Embedded content and variables are not supported in linked doclets.
> - Use Narrative Reporting web to add linked regular doclets to a report package.
> - Workflow activities, such as Submit, Approve, Reject, and Recall, apply to linked regular doclets. These tasks can be completed in Oracle Smart View for Office.
> - The link is deactivated when the doclet is marked complete.

In Smart View, you can:

- View the content of a linked regular doclet in a report package by selecting the doclet and clicking Open.
- View the properties of a linked regular doclet by selecting the doclet in the Report Center either selecting Properties in the Action Panel or by clicking the Inspect button in the Narrative Reporting ribbon.
- Perform these author phase workflow tasks on a linked regular doclet: Submit, Approve, Recall, Reject.
- Replace the linked regular doclet, and thus remove the link, by checking out the linked regular doclet and clicking the Replace File button in the Narrative Reporting ribbon. Narrative Reporting warns you that the replacing the file will break the link. After confirming the Replace File operation, and checking in the unlinked doclet, the doclet becomes like any other regular doclet in the report package, and can be further authored, uploaded, checked in, submitted, approved, recalled, and rejected.

  Any changes made to the unlinked doclet are reflected only in the doclet in the current report package, and not in the library document that was linked to previously.

  Note that in Narrative Reporting web, the doclet link can also be removed or deactivated when the doclet is marked complete, the author phase is complete, or the report package is marked final.

For more information, see:

- Adding Doclets in *Creating and Managing Report Packages for Narrative Reporting*
- Working with Linked Regular Doclets in *Working with Oracle Smart View for Office*

Narrative Reporting 22.09 Extension Update

An updated Narrative Reporting extension for Oracle Smart View for Office is now available to download and install. This update includes support for linked regular doclets, enabling you to easily share common library documents across multiple report packages, along with general improvements and bug fixes.

Narrative Reporting 22.06 Features and Updates

Related Topics

- Reports Functionality No Longer Requires Narrative Reporting Extension
- Narrative Reporting 22.06 Extension Update

Reports Functionality No Longer Requires Narrative Reporting Extension

Reports functionality is now available in Oracle Smart View for Office and no longer requires the Narrative Reporting extension. Smart View now exposes Reports functionality when connected to Narrative Reporting 22.06+, as well as when connected to supported Oracle Enterprise Performance Management Cloud sources.

With the 22.06 Narrative Reporting extension update, connected to 22.06+ Narrative Reporting, the Reports commands are provided by Smart View.

For Smart View users, access to the Reports commands is the same as in previous updates. Select a report, and the **Import Formatted Reports** and **Properties** commands are displayed. Select a grid, and the **Import as ad hoc query** command is displayed.

> **✎ Note:**
>
> The **Properties** command is no longer available on grids.

Differences in the user interface can occur depending on whether you're connected to Narrative Reporting 22.06 or Narrative Reporting 22.05 and earlier. Note the following:

- When connected to Narrative Reporting 22.06 or later, Smart View is providing access to the Reports commands.

  This is the recommended configuration with Smart View 22.100. With this configurations, users will view a Reports folder in the Narrative Reporting Home panel. Oracle recommends this configuration.

- When connected to Narrative Reporting 22.05 or earlier, the Narrative Reporting extension is providing access to the Reports commands.

  If you're using this configuration, which is not recommended, you may see two Reports folder in the Library tree in the Narrative Reporting Home panel.

  Oracle recommends updating your environment to Narrative Reporting 22.06 or later.

For more information on using Reports while connected to Narrative Reporting, see Reports in the EPM Cloud Platform in the *Oracle Smart View for Office User's Guide* .

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 accessing the Reports menu items when connected to Narrative Reporting, described in Reports Functionality No Longer Requires Narrative Reporting Extension, along with general improvements and bug fixes.

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 22.100 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 (22.100 and 21.200) of Oracle Smart View for Office against current products on Premier Support.

Microsoft Windows Operating System and .NET Support

Oracle Smart View for Office 22.100 is supported on Windows 10 and Windows 11, 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, 2019, and 2021
- Microsoft Office 365

Microsoft Office 2013, 2016, 2019, and 2021

Oracle Smart View for Office supports Microsoft Office 2013, 2016, 2019, and 2021.

> ✎ **Note:**
>
> Office 2021 is supported starting in Smart View 22.100.

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.

> **✎ Note:**
>
> Starting with the Oracle Enterprise Performance Management Cloud 20.09 update and Oracle Enterprise Performance Management 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 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 22.100 library on the Oracle Help Center here:

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

Browser Version Support

Oracle Smart View for Office does not have a browser version dependency; however, it is possible that the products that Smart View works with do.

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.
>
> Smart View 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.
>
> For more information, see Oracle Support Document 2877741.1, Impact on Smart View with Microsoft decommissioning Internet Explorer 11 on June 15, 2022.

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 Microsoft Edge 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 the **Health Check** dialog (described in Performing a Health Check On Your System in the *Oracle Smart View for Office User's Guide*). Administrators can also enable WebView2 by editing the Smart View properties.xml file (by default in `C:\Oracle\SmartView\cfg`) and setting the `<disableWebView2>` property to `1`. The default is `0` (disabled).

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 22.100 from the following releases:

Table 1-1   Supported Paths to this Release

Release Upgrade Path From	To
11.1.2.5.xxx	22.100
20.xxx	22.100
21.xxx	22.100

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
- Narrative Reporting
- Reports, Books

About Defects Fixed in This Release

The topics in this section include defects fixed in Release 22.100. 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

- 33649556, 34072502 – While upgrading Smart View, two entries of Smart View are no longer seen in the Programs and Features section of the Control Panel if the same mode of installation or upgrade, that is either silent installation by administrators or through installation wizard using GUI, is used while installing or uninstalling the previous and current versions. It is recommended to use only one

installation mode and to uninstall the previous version before upgrading to a higher version of Smart View.

- 33936507 – Suppression of rows with 0 or missing values now works for ad hoc grids with formulas after refreshing the sheet.

- 33986952 – When the OutputAliasTable parameter is blank and the connection level alias is set to None, the wrong alias is no longer sent.

- 34015270, 34341096 – Excel no longer stops working when using the VBA function, HypSetAliasTable, if no grid is present on the sheet.

- 34102567 – Change history for text cells, which were earlier empty and then had some values added, now displays correctly in the **Change History** dialog.

EPM Cloud

> ✏️ **Note:**
>
> Unless otherwise noted, the fixed defects described in this topic apply to these Oracle Enterprise Performance Management Cloud services:
>
> - Enterprise Profitability and Cost Management
> - Financial Consolidation and Close
> - FreeForm
> - Planning
> - Planning Modules, including Strategic Modeling
> - Tax Reporting

These EPM Cloud-related issues are fixed in in this release:

- 33385403 – Performance improvements have been made to increase the threshold limits for HsGetValue and HsSetValue functions. These improvements will reduce connection failures while connecting to business processes, such as Financial Consolidation and Close, from Oracle Smart View for Office.

  If a large number of HsGetValue or HsSetValue functions are present on a single Excel sheet and the threshold limit is crossed, then Smart View is unable to retrieve or load the data, and displays an error message. In such cases, Oracle recommends that you reduce the number of HsGetValue or HsSetValue functions and ensure that they are within the threshold limits. These limits may vary from application to application and from cube to cube within the same application depending on the dimensions.

- 33466067, 33647012 – When performing an FDMEE drill-through:

  – 33466067 – An improved error message is returned when the drill-through query does not return any data.

  – 33647012 – Smart View users can now drill through to a new sheet without errors.

- 33648952 – Data in a Smart List is now submitted correctly when using the **Submit Without Refresh** command.

- 33987522 – Resolves some intermittent Strategic Modeling connection issues in Smart View when using OCI environments.

- 34343140 – Excel no longer stops working when changing alias in ad hoc grids.

Narrative Reporting

33703443 – In the Library tree in the Narrative Reporting Home panel, you will now see the main node correctly named as "Narrative Reporting."

Reports, Books

The fixed defects described in this topic apply to Reports or EPM Books in Oracle Enterprise Performance Management Cloud.

- 31747477, 34138407 – All row and column headings layers will be included in Excel ad hoc queries even when they are hidden in the grid in Reports preview. Hidden row/column layers will now appear in the respective dimensions and will no longer move to POV.

- 33756230 – On opening a report containing prompts with default values defined, the prompt values are now listed as expected in the **Select Prompts** dialog.

- 33779908, 34206072, 34339596, 34376567 – When importing Reports into Excel, the **Edit POV** button in the Smart View ribbon is now working correctly. Users can launch the **Select POV** dialog, make changes to the POV, and refresh reports without issues. Additionally, an error no longer occurs when changing the POV of a report to a shared member for any dimension, including the Entity dimension.

- 33822162 – Users can now refresh a saved report without opening the Smart View Connection panel.

- 34176976 – Only data rows or columns are included in the Excel document which is generated using the **Download as Excel Ad Hoc** action in HTML preview. Text, Formula, Separator, and Note rows or columns are ignored.

- 34230330, 34315234 – Extra space no longer appears at the end of especially large grids.

- 34276542 – If TOC Headings for one or more Reports in a Book are configured to be empty, content for those Reports will be added to the end of the workbook when the Book is imported to Excel.

- 34328674, 34361132 – When a Report is imported into Excel, numeric data cells in a grid will appear correctly formatted. It is required that the Windows Region settings related to data format and Excel's advanced data format options for thousand separator and decimal separator must be the same as specified in the Report Designer.

Known Issues

Related Topics

- General
- EPM Cloud
- Financial Management
- 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.

- 34032813 – After installing Oracle Smart View for Office as a System user, when Excel is launched for the first time, the registry key HKEY_CURRENT_USER, or HKCU is updated with the location of the HsTbar.xla file. While uninstalling Smart View, the HKCU entries are not removed automatically. After uninstalling Smart View, when Excel is launched for the first time, Excel tries to locate the HsTbar.xla file and shows an error stating it could not find the file.

  Workaround: To avoid this error, delete the entries from the Windows Registry manually using the steps given in Excel Looks for HsTbar.xla File After Uninstall in the *Oracle Smart View for Office Installation and Administration Guide* .

- 34045185 – When connected to on-premises data sources, launching a drill-through report causes Smart View to crash. This happens when Chrome is the default browser.

  Workarounds:

  – Start Chrome before launching the drill-through report.

  – If you experience the crash, reload the Smart View extension for Chrome:

    1. Click on the balloon at the bottom right of the browser window to reload the extension.

    2. Click the **Reload this page** button at the top left of the browser (on the left of the address bar).

  – Choose Firefox or Edge as your default browser.

- 34344067 – When attempting to view the instructions on a form, the instruction text may not display if WebView2 is disabled.

  Workaround: In the **Health Check** dialog, ensure that WebView2 Runtime is installed and enable it.

EPM Cloud

> **✎ Note:**
>
> Unless otherwise noted, the known issues described in this topic apply to these Oracle Enterprise Performance Management Cloud services:
>
> - Enterprise Profitability and Cost Management
> - Financial Consolidation and Close
> - FreeForm
> - Planning
> - Planning Modules, including Strategic Modeling
> - Tax Reporting

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

- 34399104 – When connected to EPM Cloud 22.08+, a Bindows error can occur when importing an Oracle Hyperion Financial Reporting document.

  Workaround: To avoid this error, set the **Browser Emulation Mode** option to `11001` or `10001` in the **Health Check** dialog:

  1. From the Smart View ribbon in Excel, click the arrow next to **Help**, and then select **Health Check**.

  2. In the **Health Check** dialog, **Registry Information** group, locate the **Browser Emulation Mode** line.

  3. In the **Fix/Update/Info** column, click in the cell to enable the drop-down list, and select either `11001` or `10001`.

  4. Click the **Update Settings** button, and then click **Close**.

  5. Restart Excel, connect to the data source, and import a Financial Reporting document.

- 33622708 – While saving a Microsoft Office file to the EPM Cloud Library from Oracle Smart View for Office, if the file size is nearly 20 MB, an error appears stating that it exceeds the maximum allowed size limit of 20 MB.

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.

- 34191136 – If Chrome is your default browser, then executing Tasks Lists for Oracle Hyperion Financial Management does not work.

  Workaround: To execute Tasks Lists for Financial Management, specify Firefox or Microsoft Edge as your default browser.

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 22.100 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 **Cloud Applications**, and then click **Enterprise Performance Management** in the **Enterprise Resource Planning (ERP)** group. On the Oracle Enterprise Performance Management (EPM) page, click the link for your service to view the documentation.

EPM System

For EPM System documentation on the Oracle Help Center, click **On-Premises Applications** . On the Oracle Applications page, click **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 13.0.1

- Office PIA 14.0

- InstallShield 2019

- Open XML SDK 2.12.1

- Zlib Data Compression Library 1.2.11

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

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