Oracle® Smart View for Office

Readme

Release 23.100

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Smart View 23.100 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 23.100

Related Topics

- Ability to Preview POV while Importing Reports
- Compatibility of Forms and Ad Hoc Grids Between Smart View and Smart View (Mac and Browser)
- Support for Microsoft Office Themes (Including Dark Theme)
- New Health Check Options to Facilitate Microsoft Edge WebView2 Support
- New VBA: HypGetErrorInfo
- Additional Provider Support for Performing Calculations without Submitting Changes (Calc on the Fly)
- Virus Scan on Uploaded Files in OCI (Gen 2) Environments
- New Flex Form Option to Retain Invalid Members in Smart View
- View Member Name and Alias in Rows, Even When an Alias Table is Not Used in Smart View
- Additional Properties Viewable in Member Information Dialog in Smart View
- Performance Improvement in Zoom In Operations on Multiple Selected Cells in Smart View
- EPM Books Features and Updates
- Narrative Reporting Features and Updates

Search for Forms and Other Artifacts in Smart View

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

You can now search for forms present in your EPM Cloud business process in Oracle Smart View for Office. The ability to search helps you find and access the forms you need faster. In addition to forms, you can also search for Smart Forms, ad hoc grids, dashboards, and composite forms.

Once connected to a supported EPM Cloud business process, using either a shared connection or a private connection, open the Smart View Home Panel. The search box appears in the Smart View Home panel below the Connections field and above the tree view. You can type a term and get the list of matching items filtered based on the searched term. In the search results, the various artifacts are displayed with their respective icons for easy identification.

> **Note:**
>
> Though flex forms are searchable, they are displayed in the search results with the simple form icon and can only be opened as a simple form. You must navigate the tree in the Smart View Panel to locate and open a flex form as a flex form.

You can right-click an item in the search results to view the context menu options specific to the selected item.

Currently, you can search within the Library folder only. The following are supported in search:

- Regular expressions

- Alphanumeric terms: For example, Plan2022, Q3-report, or expenses5Jul

- Case-insensitive search: For example, searching for "plan", "Plan", or "PLAN" fetches the same list of items which have this term in their names, irrespective of their case.

If there are no matching items for the searched term, the panel appears blank. You can clear the search box by clicking the Close icon.

For more information, see Searching for Forms and Other Artifacts in the *Oracle Smart View for Office User's Guide*.

Freeze Row and Column Headers Using Smart View Options

You can now freeze row and column headers in all forms and ad hoc grids dynamically, irrespective of their size and layout, using Oracle Smart View for Office's new **Freeze Row and Column Headers** option.

Applies to: This option is supported for all forms, both cloud and on-premises; for ad hoc grids created from Standard mode applications in EPM Cloud only; and for ad hoc grids created from Essbase Cloud or Essbase on-premises applications. See the complete list of supported business processes and applications at the end of this topic.

Freezing row and column headers helps you retain the context while scrolling through large sets of data. Different forms may have different numbers of row and column headers. Smart View recognizes this difference and dynamically freezes row and column headers for every form and ad hoc grid.

To enable freezing of row and column headers, in the Smart View **Options** dialog, open the **Formatting** tab, and select the **Freeze Row and Column Headers** check box.

This Smart View option works differently from Microsoft Excel's **Freeze Panes** option in the following way:

Using Excel's **Freeze Panes** options:

- When you manually apply a freeze for one form, Excel continues to freeze the selected rows and columns even if you open another form.

- For example, Form A has 3 header rows so you freeze the first 3 rows manually using the **Freeze Panes** options on Excel's **View** ribbon. Now, if you open Form B which has 2 header rows, Excel continues to freeze the 2 header rows along with the first data row, as it retains the freeze selection done previously for first 3 rows in Form A.

- To correct the view in a new form with a different layout, you have to unfreeze the rows manually and select the required number of rows again to apply the freeze.

- When you refresh the sheet, perform any ad hoc operations, or make any layout changes, the freeze continues to remain on the selected rows or columns.

Using Smart View's **Freeze Row and Column Headers** option:

- When you select this option, Smart View freezes row and column headers dynamically for all forms and ad hoc grids that you open, based on their size and layout.

- For example, for Form A with 3 header rows, Smart View freezes the first 3 rows if you have selected this option. Now, if you open Form B with 2 header rows, Smart View recognizes the difference in the number of header rows, and freezes only the top 2 rows automatically, without affecting any data rows.

- When you open new forms, you do not have to do any manual changes. This option saves your efforts in reapplying the freeze every time you open a new form.

- When you refresh the sheet, perform any ad hoc operations, or make any layout changes, Smart View updates the frozen rows or columns according to the changes. If you click **Undo** in an ad hoc grid, then Smart View removes the freeze and applies it back when you click **Refresh**.

If you disable this option, Smart View immediately removes the freeze from the rows and columns, so that you can freeze them manually as you require.

This feature is supported by the following business processes and applications:

- EPM Cloud: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, Planning Modules, Tax Reporting—Supported for forms and ad hoc grids. For ad hoc grids, the application setting for the **Smart View Ad Hoc Behavior** option must be set to **Standard**.

- EPM System: Oracle Hyperion Financial Management, Oracle Hyperion Planning—Supported for forms only.

- Essbase Cloud and Essbase (on-premises)—Supported for ad hoc grids only.

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

New Smart View Options for Formatting Numbers

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

The following new options have been introduced for formatting numbers in forms and ad hoc grids using Oracle Smart View for Office Options. These options can be used only when the **Use Cell Styles** option is selected, instead of the **Use Excel Formatting** option in the **Formatting** tab of Smart View Options. After setting any of these options, click **Refresh** to reflect the changes in the sheet.

Increased number of decimal places

Smart View now supports displaying numbers with up to 30 decimal places. This helps to get a clear and accurate view of numbers such as 0.076579982761 which may appear rounded off as 0, if the actual decimal places are not displayed.

> **Note:**
>
> Although Excel supports only 15 digit precision for decimal places based on IEEE standard, users can still use up to 30 decimal places using Excel's formatting options. For more information about Excel's 15 digit precision for decimal places, see Microsoft's article on Floating-point arithmetic may give inaccurate results in Excel.

To set decimal places, open the Smart View Options dialog. In the **Formatting** tab under the **Number Formatting** section, select the required number of decimal places from the **Decimal Places** list. You can preview the format based on the selected option.

Multiple formats for displaying negative numbers

Smart View now supports the standard negative number formats that are supported by Excel. The following formats are available for negative numbers:

- **Default:** Displays negative numbers with a minus (-) sign. For example, -125.
- **Parenthesis:** Displays negative numbers within parentheses. For example, (125).
- **Red Color:** Displays negative numbers in Red font color.
- **Parenthesis and Red Color:** Displays negative numbers within parenthesis and in Red font color.

> **Note:**
>
> As per Excel's functionality, the negative numbers are not displayed in Red font color while using the high contrast mode.

To set the negative number format, open the Smart View Options dialog. In the **Formatting** tab under the **Number Formatting** section, select the required option from the **Negative Number Format** list. You can preview the format based on the selected option.

Custom format for numbers

Smart View now supports custom formatting for numbers. This provides more control and flexibility for customizing the appearance of numbers. Custom number format overrides other formatting settings set in the Number Formatting section. Such custom

formatting applies to numbers in Data cells, and does not affect Member cells, Date, and Text content.

To set custom number format, open the Smart View Options dialog. In the **Formatting** tab under the **Number Formatting** section, select the **Use Custom Number Format** check box and enter the string representing the format. The following are some examples of format strings:

- $#,##0.000_);[Blue]($#,##0.000)

- ($* #,##0.00_);_($* (#,##0.00);_($* "-"??_);_(@_)

- 0.00

> **Note:**
>
> - If the **Use Custom Number Format** check box is selected, then all fields in the Number Formatting section such as **Use Thousands Separator**, **Decimal Places**, and **Negative Number Format** become disabled and cannot be selected.
>
> - If the format is left blank, Excel applies the General number format, which is helpful in scenarios when you want to see raw decimal places in a number to a certain degree as allowed by Excel.
>
> - If the format is of Empty or Accounting or Text type, then a data cell with percentage value uses 0% as the default format.
>
> - Ensure that you enter a valid format. As the format is not validated, Excel may either revert to the General number format or display random characters and undesired results for invalid formats.
>
> - For more information on Excel's custom number formats, see Microsoft's documentation on Number Format Codes.

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

Load Pages on Demand for Opening Forms Faster

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

To enable faster opening of forms in Oracle Smart View for Office, you can now control the loading of pages in forms on demand. When forms contain large number of pages with thousands of members, sometimes it may take a longer time to load such forms. Once loaded, it may also become difficult to filter and select from the long list of members in the POV toolbar.

A new option in Smart View Options, **Load Pages On Demand If Count Exceeds**, helps to speed up the form loading time and offers better search and filtering for selecting pages easily. This option is disabled by default. You can enable it from the Advanced tab in Smart View Options dialog. You can set a count of pages from 100 to

9999. If your form contains pages beyond this count, then you will be able to load pages on demand. For example, if your form contains 10000 pages and you have set the count as 200, then on opening the form, Smart View displays only the selected page in the POV list and you can select the pages you want to load from the POV list. This way, the form opens quickly and you do not have to wait till all the pages are loaded to start working.

To view all pages, you can click the ellipses (…) in the POV list. With the improved search and filter capability of the search bar in the list, you can search for specific pages faster. Once this option is enabled, it applies to all forms, saved and new ones. When you enable or disable this option, the changes in the POV toolbar become effective only after you perform any of the following actions:

- Reopen a saved workbook with Smart View content.

- Modify the page selection and click Refresh. Note that a simple refresh without any modifications will not reload the POV toolbar.

- Open a form for the first time on a sheet.

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

Ability to Preview POV while Importing Reports

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

When you import a report from either Narrative Reporting or Reports, you can now preview and set the POV. Previewing the POV gives you the ability to control and edit it before importing and opening a report.

As a prerequisite for previewing POV, you need to enable it in user preferences in the web application as follows:

- In Narrative Reporting, navigate to **Tools**, click **User Preferences**, and select the **Preview POV** check box in the **Reporting** tab.

- In Reports from an Oracle Enterprise Performance Management Cloud business process, navigate to **Tools**, click **User Preferences**, and select the **Preview POV** check box in the **Reports** tab.

After saving the user preferences, restart Microsoft Excel if it is already open, and connect to the data provider in Oracle Smart View for Office. Now, when you import a report, the **Select POV** dialog appears first and you can control the POV by editing the values. After setting the POV, if the report contains prompts, then the **Select Prompts** dialog appears and you can make the required selections. The report is imported with the selected POV and prompts.

If previewing POV is not enabled in user preferences, then while importing a report, only the **Select Prompts** dialog appears, if the report contains prompts. The report is imported with the default POV and selected prompts. If you want to edit the POV, you can use the **Edit POV** option on the Smart View ribbon to control the POV.

> **📝 Note:**
>
> If you click **Cancel** in the **Select POV** or **Select Prompts** dialog box, the import process is cancelled and the report does not get imported in Smart View. If you do not want to change the default POV or prompts, click **OK** to proceed importing reports.

For more information, see Previewing POV in Reports in the *Oracle Smart View for Office User's Guide*.

Compatibility of Forms and Ad Hoc Grids Between Smart View and Smart View (Mac and Browser)

Starting in 23.100, compatibility of forms and ad hoc grids (Standard mode) is supported between Smart View for Office and Smart View for Office (Mac and Browser) 23.04+. Forms and ad hoc grids are now made compatible such that you can easily work on them between Smart View for Office and Smart View for Office (Mac and Browser).

For example:

1. Open a form or ad hoc grid in Smart View on your desktop version of Microsoft Excel, change the POV, refresh or submit, and close the sheet.

2. Now, open the same form in Excel 365 on a Mac or on browser using Smart View (Mac and Browser) and click Refresh first before starting any operations.

3. Observe that your POV selections are retained in the sheet, and you can continue working on it.

4. Once you make any changes to the POV in Smart View (Mac and Browser), click Refresh to save the changes. You should see the changes when you open the form again in Smart View.

The compatibility between both Smart View products ensures that Smart View:

- Identifies the type of sheet, whether form or ad hoc

- Displays the same sheet information in both products

- Retains the same POV and pages selections

- Displays the same data that is saved, refreshed, or submitted

- Retain preferences set in Data Options and Member Options under Smart View Options

While this compatibility is always enabled for Smart View for Office (Mac and Browser), it needs to be enabled in Smart View for Office by uncommenting or enabling the `JSONMetadata365URL` property present in the Smart View `properties.xml` file, located in the `<Smart View Install>/cfg` folder (for example, `C:\Oracle\SmartView\cfg`). Also, you may need to map the detected connection URL to the actual connection URL in Smart View for Office using the **Manage URL**

Mappings option. For more information, see Managing Connection URL Mappings in the *Oracle Smart View for Office User's Guide*.

> **✎ Note:**
>
> - Composite forms, flex forms, and multiple-grid ad hoc worksheets are not yet compatible between the Smart View products.
>
> - Whenever you open a form or ad hoc grid from Smart View for Office in Smart View for Office (Mac and Browser) and vice versa, it is recommended that you always click Refresh first before starting any operations on the sheet.
>
> - It is recommended not to keep the same form or ad hoc grid open in both Smart View for Office and Smart View for Office (Mac and Browser) at the same time, as it can cause conflict between cell styles.
>
> - When you create workbooks containing forms or ad hoc grid in Smart View for Office and open them in Smart View for Office (Mac and Browser), you have to first open the Smart View Home Panel and either click Refresh or open another sheet in order to launch the relevant provider context ribbon such as the Planning ribbon.

For more information, see Working Compatibly on Forms and Ad Hoc Grids Between Smart View and Smart View (Mac and Browser) in the *Oracle Smart View for Office User's Guide*.

Support for Microsoft Office Themes (Including Dark Theme)

Applies to: All

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

> **✎ Note:**
>
> - Black theme is available only if you have a Microsoft Office 365 subscription.
>
> - Office themes are supported in Smart View from Microsoft Office 2016 onwards. Office themes are not supported on Office 2013.
>
> - Office themes are supported for the EPM Books 23.02+ and Narrative Reporting 23.06+ extensions.

Office themes can be enabled from the **Options** menu of your Microsoft Office application. In the **General** tab, under **Personalize your copy of Microsoft Office**

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

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

Note the following considerations while using themes:

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

- List view and tree view always retain the white background, irrespective of the theme applied.

- Black theme cannot be fully applied to toolbars and menus in panels and dialog boxes. Instead, these appears with a gray background.

- If high contrast is enabled at system level, then the Office theme is ignored.

For more information, see **Using Microsoft Office Themes (Including Dark Theme)** in Enabling Accessibility for Smart View in the *Oracle Smart View for Office Accessibility Guide*.

New Health Check Options to Facilitate Microsoft Edge WebView2 Support

In the **Health Check** dialog, two new Microsoft Edge WebView2 enablement options are introduced, **Enable for UI** and **Enable for All**, to allow you to select the level of WebView2 support you require.

Previously, the available WebView2 options were **Enable** (now **Enable for UI**) and **Disable**.

Oracle Smart View for Office uses Microsoft Edge WebView2 to display the user interface login pages and facilitate networking. To accomplish this, Smart View supports Microsoft Edge, along with Microsoft Internet Explorer system components, to display the authentication page, leveraging WebView2 to process complex login sequences.

> **✎ Note:**
>
> Microsoft is currently developing and enhancing WebView2. Microsoft and Oracle advise that you do not uninstall Internet Explorer on computers running Smart View. Even though Microsoft has ceased support for Internet Explorer, it is still tightly integrated with the Windows operating system. If you uninstall it, some libraries that Windows requires for proper networking will also be uninstalled, which may lead to issues; for example, handling the certificates necessary for login or working with some older web sites that require Internet Explorer mode from Edge.
>
> Microsoft advises users that they may disable Internet Explorer, but not uninstall it. If you have already uninstalled Internet Explorer, you may experience issues with networking, not only with Smart View, but system wide. You will not be able to use Smart View's **Disable** option in cases where critical issues with WebView2 are introduced by Microsoft, and you will not be able to log in pending further WebView2 development and enhancements.
>
> Due to these issues, Oracle advises you to use the **Disable** option for WebView2 in Smart View (this is the default). You should only use the **Enable for UI** option if your system has implemented two-factor authentication or if you were advised by Oracle to do so.
>
> You should only use the **Enable for All** option if you were advised by Oracle to do so.

To use WebView2, Microsoft Edge WebView2 Runtime must be installed and enabled on each Smart View client machine.

Use the **Health Check** dialog to verify that WebView2 Runtime is installed:

- If WebView2 Runtime is not installed, then **WebView2 Runtime Version** in the **Version Information** group displays **None** and the **WebView2 Runtime** option is not displayed in the **Smart View Options** group.

- If WebView2 Runtime is installed, then a version number is displayed in **WebView2 Runtime Version**, whether it's enabled or disabled, and the **WebView2 Runtime** option is displayed.

When WebView2 Runtime is installed, the new **WebView2 Runtime** options are available in the **Fix** column. The options are:

- **Enable for UI**—When enabled, WebView2 is used by Smart View to assist with some authentication scenarios at login. During runtime, Smart View detects the presence of WebView2 Runtime installed on the machine and launches the WebView2-based dialog to host the login page. Webview2 also works in conjunction with the Microsoft Edge browser to display the wizard when importing reports from Oracle Hyperion Financial Reporting (cloud and on-premises).

- **Enable for All**—Works with the authentication scenarios described in **Enable for UI**, and also enables WebView2 for networking. This option is recommended for use in diagnosing connection issues.

- **Disable**—Default. Select to disable WebView2.

> **Note:**
>
> WebView2 is supported only on Microsoft Windows 10 and 11.

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

For more information on WebView2 in Smart View, see Microsoft Edge WebView2 Support in the Platform Support section of this readme.

New VBA: HypGetErrorInfo

This release introduces a new VBA function, HypGetErrorInfo().

HypGetErrorInfo behaves as a lookup table for error strings, returning meaningful strings for most of the documented error codes.

> **Note:**
>
> - Many negative error codes will return `"Unsupported error"`; this assumes that these codes are no longer in use.
>
> - Some error codes will return "Check Last Error from provider for more information". In these cases, you must use the HypGetLastError VBA function for more error information.

For syntax and examples of HypGetErrorInfo and HypGetLastError, see these topics in the *Oracle Smart View for Office Developer's Guide*:

- HypGetErrorInfo
- HypGetLastError

Additional Provider Support for Performing Calculations without Submitting Changes (Calc on the Fly)

Applies to: Financial Consolidation and Close, Tax Reporting

Starting with the Oracle Enterprise Performance Management Cloud 23.05 update, support for performing calculations without having to submit your changes (calc on the fly) is extended to Financial Consolidation and Close and Tax Reporting.

During ad hoc analysis you can perform calc on the fly in Oracle Smart View for Office, as well as in your Financial Consolidation and Close or Tax Reporting business process, without having to submit the changes to see the results.

Previously, calc on the fly was only supported for FreeForm, Planning, and Planning Modules from 22.03+. In Smart View, calc on the fly is supported starting in the 21.200 release.

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.

Once calc on the fly is enabled:

- In the web application, hover over a cell to see the formula associated with the cell.

- In Smart View, the formulas appear as tool tips in the cells with formulas.

For more information on enabling and using calc on the fly, see:

- Financial Consolidation and Close

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

  - *Working with Financial Consolidation and Close:*

    * Setting Your Display Preferences

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

- Tax Reporting

  - Specifying Application Settings in *Administering Tax Reporting*

  - *Working with Tax Reporting*

    * Setting Your Display Preferences

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

- Performing Calculations Without Having to Submit Your Changes (Calc on the Fly) in *Oracle Smart View for Office User's Guide*

Virus Scan on Uploaded Files in OCI (Gen 2) Environments

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

Service Administrators can now enable virus scan on the files being uploaded to OCI (Gen 2) environments using the EPM Automate command or REST API introduced in the Oracle Enterprise Performance Management Cloud 23.06 update. Scanning files before they are uploaded prevents the possibility of uploading viruses to the environment.

When connected to any supported EPM Cloud business process from Oracle Smart View for Office, there are user-initiated procedures that require file upload, attachment, or saving.

Some examples are:

- Attaching a file to a cell in a Planning form

- Uploading a doclet to a report package in Narrative Reporting

- Saving a file to the Library folders under the Documents in Enterprise Profitability and Cost Management

When virus scan is enabled, and a virus is detected in a file during an applicable supported operation, the file is not saved in the environment.

Enabling virus scanning helps to enhance the security of your OCI (Gen 2) environment by ensuring that no one can upload infected files to the environment.

EPM Cloud Service Administrators enable virus scan using the new EPM Automate command or REST API described in EPM Automate Updates and Migration REST API Updates.

For more information, see:

- Virus Scan on Uploaded Files in OCI (Gen 2) Environments in *Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*

- *Working with EPM Automate for Oracle Enterprise Performance Management Cloud*:
    – Installing EPM Automate
    – getVirusScanOnFileUploads
    – setVirusScanOnFileUploads

- *REST API for Oracle Enterprise Performance Management Cloud*:
    – Migration REST APIs
    – Get Virus Scan on File Upload
    – Set Virus Scan on File Upload

New Flex Form Option to Retain Invalid Members in Smart View

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

In flex forms, you can now retain invalid members on the sheet after a refresh. To accomplish this, Service Administrators enable the new Oracle Smart View for Office option, **Show invalid members on flex form**, during form design.

When entering member names in a flex form, errors may occur; for example, you may:

- Mistype or misspell a name, creating an invalid member in the cell

- Make an error when copying and pasting member names from one sheet to another, or within the same sheet, resulting in invalid members

- Enter a member name that is beyond the form definition, resulting in an invalid member

Previously, when this occurred, the rows or columns with invalid members were removed from the sheet upon refresh, making it difficult to know what the issue was, and forcing you to reenter member names.

Starting in the 23.07 update, the flex form can retain any invalid members on the form after refresh if the Service Administrator enables the **Show invalid members for flex form** check box under **Smart View Options** in the Layout tab of the form definition.

> **Note:**
>
> - Note that the **Show invalid members for flex form** check box is enabled only when **Enable flex form for rows** or **Enable flex form for columns**, or both, are enabled.
>
> - In rows and columns containing multiple dimensions, if even a single member is invalid, all members on the row or column are highlighted as invalid. For example, if a row contains the *Tablet* and *Current* members, and you type *Tablet* correctly, but type *Currnt* in error, both the Tablet and Currnt members will be highlighted as invalid. You should examine all the highlighted member names and correct those that are typed incorrectly.
>
> - Attempting to delete an entire row or column by using the Delete key to delete only the member cells of a row or column will result in invalid members in the member cells upon refresh. To delete entire rows or columns on a flex form, use the **delete entire row** or **delete entire column** operations in Excel.

Enabling the new **Show invalid members for flex form** check box lets users easily understand and correct any error they may have made in entering member names in flex forms.

To retain invalid members on a flex form, a Service Administrator performs these steps from the Oracle Enterprise Performance Management Cloud web interface:

1. From the Navigator, under **Create and Manage**, click **Forms**.

2. Select an existing form to edit or, in the **Form and Ad Hoc Grid Management** page, click the **Actions** drop-down menu and click **Create Simple form**.

3. In the form definition page, 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.

4. Select the **Show invalid members for flex form** check box. This option is displayed only when a row or column flex option is selected, as described in the previous step.

5. Optionally, for individual rows or columns, in **Dimension Properties**, enable the **Flex beyond form definition** option, as you require.

6. Save the form.

For more information, see:

- Flex Forms in the *Oracle Smart View for Office User's Guide*
- *Administering FreeForm*
    - Designing Flex Forms
    - Setting Smart View Form Options
    - Setting Dimension Properties
- *Administering Planning*
    - Designing Flex Forms
    - Setting Smart View Form Options
    - Setting Dimension Properties

View Member Name and Alias in Rows, Even When an Alias Table is Not Used in Smart View

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

Using the **Member Name and Alias** option, you can now view member name and alias in rows even when an alias table is not used, that is, set to **None**, without impacting the display of member names in POV columns.

The **Member Name and Alias** option allows you to view both the member names and their aliases in adjacent columns for row dimensions in ad hoc grids when connected to a Standard-mode application.

Previously, when this option was selected, member names and aliases were displayed in rows, if an alias table was selected or set to **Default** using the **Change Alias** option on the provider ad hoc ribbon. Now, you can view member names and aliases in rows even when an alias table is not used, that is when it is set to **None**. When the **Member Name and Alias** option is selected and the alias table is set to **None**, the row dimensions retain the aliases based on the last used alias table, while the POV columns display the member names or aliases based on the last used alias table.

In Smart View, to view 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, click **Options**.
3. In the Member Options tab, select the **Member Name and Alias** option from the **Member Name Display** list, 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.
5. In the provider ad hoc ribbon, click **Change Alias** and select the **None** option. Observe that the member names and their aliases for row members are retained in the grid.

Users, especially those migrating from Essbase, now get the same functionality of viewing member names and their aliases side-by-side, irrespective of whether an alias table is selected or not.

> **Note:**
>
> 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**.

For more information, see the following topics in *Oracle Smart View for Office User's Guide*:

- Working with Aliases and Alias Tables
- Displaying Member Names and Aliases in Grid
- Member Options

Additional Properties Viewable in Member Information Dialog in Smart View

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

In Oracle Smart View for Office ad hoc grids, additional members properties are now included in the **Member Information** dialog.

In the **Member Information** dialog, member properties are grouped and displayed on the following tabs. Only the tabs that are applicable to the member and connection are displayed.

- **Information:** A list of general information about the member such as the Name, Dimension, Data Storage, Data Type, Scenario Rollup, Skip Value, and so on.

    – The newly added properties include Generation, Parent Member Name, Child Count, Two Pass Calculation, Hierarchy Type, Solve Order, Flow Metric, Aggregation Level, Level, Share, Category, Attributed, Formula, Dynamic Child Bucket Size, and Dynamic Child Access Mode.

    – The newly added properties specific to Dimension type are as follows:

        * Version: Standard Bottom up, Sandbox Enabled, Enabled For PM

        * Scenario: Scenario Rollup, Beg Balance, Start Time Period, End Time Period, Start Year, End Year

        * Account: Exchange Rate Type, Enable445, Sub Account Type, Account Type, Time Balance, Variance Reporting, Flow Metric

        * Period : Q1, Q2, Q3, Q4 (Start Period, End Period)

- **Aliases:** A list of alias tables and corresponding aliases associated with the member

- **Attributes:** A table of the dimensions, members, and types of attributes associated with the member

- **Formula:** The formula associated with the member

- **Comments:** A list of comments associated with the member

- **User Defined Attributes:** A list of user defined attributes (attributes of the member defined by the administrator)

You access the **Member Information** dialog from the provider ad hoc ribbon in Smart View. For example, in Smart View, connect to a Planning data source and create a new ad hoc grid or open a saved one. Select a member cell and then, from the Planning Ad Hoc ribbon, select **Cell Information**.

You can also use these methods to access the **Member Information** dialog:

- In the ad hoc grid, right-click the selected member cell, then select **Smart View**, and then select **Cell Information**.

- In the **Member Selection** dialog, select a member in the right pane, and then from the **Options** button drop-down menu, select **Cell Information**.

The information you view in the Member Information dialog can also be saved to an Excel file by clicking the **Save** button.

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

Performance Improvement in Zoom In Operations on Multiple Selected Cells in Smart View

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

While zooming in on a range of selected cells in an ad hoc grid, performance issues like out of memory and worksheet loading failures are no longer encountered.

Multiple cells can be selected across rows and columns for zooming in on many levels like the next level, all the levels, or the bottom level. Zooming in on multiple cells, especially on all levels, results in a large number of cells being selected. If the data suppression options like suppress rows with no data or missing values are not enabled, it may lead to insufficient memory and failure to load worksheets while zooming in.

To prevent this issue, a governor limit for the number of selected cells is introduced along with the following improvements:

- If the number of selected cells is within the threshold, then the zoom in operation happens successfully, without any performance issues like out of memory and worksheet loading failures.

- If the number of selected cells exceeds the threshold, then a warning message informs users about the inability to load data as the number of cells before

suppression exceeded the threshold. Users can reduce their cell selection range to proceed with the zoom in operation.

To zoom in:

1. Select a range of cells.

2. In the provider ad hoc ribbon, click the down arrow next to **Zoom In** and select the level that you want to zoom in to.

3. Users can zoom in on multiple selected cells, without experiencing any out of memory issues and worksheet loading failures. A useful warning message also alerts them if they exceed the threshold for number of selected cells

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

EPM Books Features and Updates

Related Topics

- EPM Books 23.08 Extension Update
- EPM Books 23.06 Extension Update
- EPM Books 23.04 Extension Update

EPM Books 23.08 Extension Update

An updated EPM Books extension for is now available to download and install. In addition to general improvements and defect fixes, this update includes the ability for Service Administrators and Book Designes to enable users to select from all members to which they have access for the Book Point of View, as described in Member Selection Available for EPM Books POV when POV Definition is Set to Allow All Selections.

To take advantage of the features, improvements, and defect fixes in the EPM Books extension:

1. From within Oracle Smart View for Office, in the **Options** dialog, **Extensions** tab, click the **Check for Updates, New Installs, and Uninstalls** link.

2. Select your business process instance, then follow the prompts.

For more information on working with EPM Books in Smart View, see these topics in the *Oracle Smart View for Office User's Guide*:

- Installing the EPM Books Extension
- Books

Member Selection Available for EPM Books POV when POV Definition is Set to Allow All Selections

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

When editing the POV for an imported or exported Book in Excel using the Smart View EPM Books extension, users can now choose members using the Member Selection dialog if the Book designer has enabled member selection for one or more POV dimensions.

When a Book's POV setting is set to "Allow All Selections" instead of "Display Suggestions Only," viewers will see **Select...** as the last item in the POV drop-down list.

Choose the **Select** option to display the **Member Selection** dialog, from which any member in the dimension can be selected.

Then click **OK** in **Member Selection** to close the dialog, and then click **OK** in the **Select POV** dialog. A message notifies you that a refresh of the Book is in progress. Refresh the job in the Jobs Console until the job is complete and then reopen the Book.

Administrators or Book Designers: To enable users to select from all members to which they have access for the Book Point of View:

1. Open a Book in edit mode of the Book Designer.

2. To set POV option for a dimension, click the **Action** icon next to a POV dimension.

3. Toggle between **Allow All Selections** and **Display Suggestions Only**, choosing **Allow all Selections** to allow Book viewers to select from all members for the selected POV dimension.

*   Setting the Book Point of View in *Designing with Reports for Oracle Enterprise Performance Management Cloud*

*   *Working with Oracle Smart View for Office:*

    –   Importing Books into Smart View

    –   Working with Downloaded Books in Smart View

EPM Books 23.06 Extension Update

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

An updated EPM Books extension for is now available to download and install. This update includes general improvements and defect fixes.

For more information on working with EPM Books in Oracle Smart View for Office, see Books in the *Oracle Smart View for Office User's Guide*:

EPM Books 23.04 Extension Update

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

An updated EPM Books extension for is now available to download and install. This update includes general improvements and defect fixes.

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

Narrative Reporting Features and Updates

Related Topics

- Narrative Reporting 23.08 Extension Update
- Narrative Reporting 23.06 Extension Update
- Narrative Reporting 23.05 Extension Update
- Narrative Reporting 23.04 Extension Update

Narrative Reporting 23.08 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 defect fixes.

To take advantage of the features, improvements, and defect fixes in the Narrative Reporting extension, choose an option to install the extension update:

- From within Smart View, click the **Check for Updates, New Installs, and Uninstalls** link in the **Options** dialog, **Extensions** tab, select your Narrative Reporting instance, then follow the prompts.
- From the Narrative Reporting web interface, **Downloads** page, download the "Smart View Extension for EPM Cloud Narrative Reporting" SVEXT file, then double-click the file to install.

For more information, see:

- Installing the Narrative Reporting Extension in *Working with Oracle Smart View for Office*
- Downloading and Installing Clients in *Oracle Enterprise Performance Management Cloud Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*
- Downloading and Installing Clients in *Oracle Enterprise Performance Management Cloud Getting Started with Oracle Enterprise Performance Management Cloud for Users*

Narrative Reporting 23.06 Extension Update

An updated Narrative Reporting extension for Oracle Smart View for Office is now available to download and install. Along with general improvements and defect fixes, this update includes support for these Narrative Reporting features:

- Virus Scan on Uploaded and Saved Files in Narrative Reporting
- Support for Microsoft Office Themes Enabled in the 23.06 Narrative Reporting Extension

Downloading and installing the latest Narrative Reporting extension for Smart View gives you access to the latest features, improvements and defect fixes.

For more information, see:

- Installing the Narrative Reporting Extension in *Working with Oracle Smart View for Office*

- Downloading and Installing Clients in *Oracle Enterprise Performance Management Cloud Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*

- Downloading and Installing Clients in *Oracle Enterprise Performance Management Cloud Getting Started with Oracle Enterprise Performance Management Cloud for Users*

Support for Microsoft Office Themes Enabled in the 23.06 Narrative Reporting Extension

You can now apply a theme of your choice and customize your Office application while working with the Narrative Reporting extension for Oracle Smart View for Office.

The Narrative Reporting extension when used with Smart View 23.100 supports the use of themes provided by Microsoft Office. In addition to the default Colorful theme, you can now apply the Dark Gray, Black, and White themes while working with the extension in Smart View. Once applied, the background color and font color changes are seen for interface elements, including the Narrative Reporting Home panel.

To enable Office themes:

1. In your Office application, click **File** and then click **Options**.

2. In the **General** tab, under **Personalize your copy of Microsoft Office** section, select the required theme from the **Office Themes** list.

3. Click **OK**.

Keep in mind the following:

- Black theme is available only if you have a Microsoft Office 365 subscription.

- Office themes are supported in Smart View and in its extensions from Microsoft Office 2016 onwards.

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

For more information, see Using Microsoft Office Themes (Including Dark Theme) in *Oracle Smart View for Office Accessibility Guide*.

Virus Scan on Uploaded and Saved Files in Narrative Reporting

A virus scan is now performed in Narrative Reporting when uploading doclets and documents, or saving documents.

In Narrative Reporting web, the virus scan is performed when:

- Uploading a doclet in a report package, adding a new doclet, uploading reference files, uploading attachments to review comments

- Uploading a document to a folder in the Library, outside of a report package

In Oracle Smart View for Office, when connected to Narrative Reporting, the virus scan is performed when:

- Uploading a doclet in a report package, adding a new doclet, uploading reference files, and uploading attachments to review comments (requires Narrative Reporting extension 23.06 or later, described in Narrative Reporting 23.06 Extension Update)

- Saving an Office document in the Library using the Save or Save As buttons in the Smart View ribbon; and when downloading a document from the Library (does not require the Narrative Reporting extension)

When virus scan is enabled, and a virus is detected in a file during an applicable supported operation, the file is not saved in the environment.

Performing a virus scan on doclets and documents uploaded and saved to Narrative Reporting helps to protect your work, your files, and your Oracle Enterprise Performance Management Cloud environment.

EPM Cloud Service Administrators enable virus scan using the new EPM Automate command or REST API described in EPM Automate Updates and Migration REST API Updates.

For more information, see:

- Virus Scan on Uploaded Files in OCI (Gen 2) Environments in this *Readme*
- Uploading Doclets in *Authoring and Approving Doclets for Narrative Reporting*
- *Working with Oracle Smart View for Office*
    - Saving Office Documents to EPM Cloud
    - Uploading and Working with Page Attributes and Slide Masters

Narrative Reporting 23.05 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 defect fixes.

Install the Narrative Reporting extension to take advantage of the latest features, improvements, and defect fixes.

Narrative Reporting 23.04 Extension Update

An updated Narrative Reporting extension for Oracle Smart View for Office is now available to download and install. Along with general improvements and defect fixes, this update includes support for these Narrative Reporting features:

- Improved Clarity of Embedded Content Images within PowerPoint Report Packages

- Report Reference Doclets Now Support Adding Report Text and Note Boxes as Available Content in the Report Package
- Support for Notes Objects when Importing Reports to Excel

Install the Narrative Reporting extension to take advantage of the latest features, improvements, and defect 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 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 (23.100 and 22.200) of Oracle Smart View for Office against current products on Premier Support.

Microsoft Windows Operating System and .NET Support

Oracle Smart View for Office 23.100 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.

For information on additional Windows operating system support, see the matrix for your release in Supported Platforms Matrices.

Microsoft Office Support

Related Topics

- Microsoft Office 2016, 2019, and 2021
- Microsoft Office 365

Microsoft Office 2016, 2019, and 2021

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

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

> ✏️ **Note:**
>
> Users upgrading to the latest Office 365 Beta Channel or Current Channel versions may face issues using drop-down lists in Smart List, member drop-down, in-cell POV, and other such drop-down lists. For example, on clicking any drop-down lists in cells, only ellipses (…) may be displayed instead of the actual drop-down values. You will need to upgrade to Smart View 22.200 or later in order to see the drop-down values in cells properly.

Browser Support

Related Topics

- [Browser Add-ons](#)
- [Updated Smart View Browser Extension Required for Chrome and Edge](#)
- [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 all users move 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 library on the Oracle Help Center here:

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

Updated Smart View Browser Extension Required for Chrome and Edge

An updated browser extension for Google Chrome and Microsoft Edge was made available in November, 2022. This extension is required for Smart View to interact with supported browser-based EPM Cloud business process and EPM System applications in the following 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.

> **Note:**
>
> This required browser extension update is strictly for the Chrome and Edge browsers only. This is not an update for extensions, such as the Planning Admin or Narrative Reporting extensions, within Smart View.

This update is required only if your default browser is Chrome or Edge. If your default browser is Mozilla Firefox, then this update does not affect you.

The extension is available in the Chrome Web Store from either the Chrome or Edge browser. In the Chrome Web Store, search for "smart view" to locate the extension update. The updated version number is 22.200. Then follow the instructions for Google Chrome or Microsoft Edge in Installing Browser Add-ons in the *Oracle Smart View for Office Installation and Configuration Guide*.

Note that as of January 1, 2023, the previous browser extension no longer works with Chrome or Edge. You must update your extension in order to continue interactions between Smart View and browser-based applications in EPM Cloud and EPM System.

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.

> **✏ Note:**
>
> WebView2 is supported only on Microsoft Windows 10 and 11.

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 23.100 from the following releases:

Table 1-1   Supported Paths to this Release

Release Upgrade Path From	To
21.xxx	23.100
22.xxx	23.100

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
*   Reports, Books

About Defects Fixed in This Release

The topics in this section include defects fixed in Release 23.100.

To review the list of defects fixed in 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

*   34111979 – No error message is generating while refreshing in SmartView after adding a single quote (`'`) in a blank cell between two dimension members of a column.

- 34281482 – HsGetSheetInfo shows the "Last retrieved" date and time properly when reopening a workbook.

- 34779092 – When opening a workbook:

  - Issues such as "stale data" and `#NeedRefresh` no longer occur for certain functions.

  - Function cache mechanism is improved.

- 34779607 – All Oracle Smart View for Office DLL files are now digitally signed with the current version and build.

- 34627193 – Setting different fonts and font size values in the Cell Styles tab of Smart View Options now works properly.

- 34914704 – Refresh time for large ad hoc grids is improved. There should be some noticeable time saved, especially when refreshing grids with thousands of cells having duplicate member names.

- 34767239, 35068663, 35080443 – On Microsoft Windows 11 (64-bit) with Office 365, Excel no longer suspends or stops responding when working with Smart View, including working with function sheets.

- 33879146, 33489145, 34530215, 34551225, 34640285 – After enabling WebView2 using either of the two new options, Enable for UI and Enable for All:

  - No login failures are seen when trying to create a private or a shared connection.

  - Smart View does not repeatedly prompt for login.

  See New Health Check Options to Facilitate Microsoft Edge WebView2 Support for more information on the WebView2 options available in the Health Check dialog.

EPM Cloud

> **Note:**
>
> Unless otherwise noted, the fixed defects described in this topic apply to these Oracle Enterprise Performance Management Cloud business processes:
>
> - 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 this release:

- 31734137, 35618546 – Using the **Open in Smart View** command in the web business process, flex forms now open as flex forms in Oracle Smart View for Office (not as simple forms, as in earlier EPM Cloud updates). Requires EPM Cloud 23.08+.

- 34769178 – In forms, while selecting a member from the POV toolbar, the dropdown list no longer appears blank. In the POV dropdown search box, start typing the member name, and as list filters, select the required member using the mouse.

- 34978798 – Setting user variables in **User Preferences** of Smart View using the **Member Selection** dialog no longer gives errors.

Reports, Books

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

- 34735790, 34859489, 34696210 – Editing the POV in reports and then refreshing the reports no longer throws error when the selected member name contains special characters like colon (:), ampersand (&), and plus (+).

- 34806617 – Opening a Financial Reporting report in Smart View via a shared connection no longer fails on Office 365.

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.

- 35116820 – If the Health Check option, **WebView2 Runtime**, is set to **Enable for UI** or **Enable for All**, then you cannot update extensions using the **Check for Updates, New Installs, and Uninstalls** in the Smart View **Options** dialog.

  Workaround: In the **Health Check** dialog, set the **WebView2 Runtime** option to **Disable**. Restart Office. Then proceed with the extension update (or install or uninstall) using the **Check for Updates, New Installs, and Uninstalls** link in the **Options** dialog. When you're finished with extension update tasks, reenable the **WebView2 Runtime** option in the **Health Check** dialog and restart Office.

EPM Cloud

> **Note:**
>
> Unless otherwise noted, the known issues described in this topic apply to these Oracle Enterprise Performance Management Cloud business processes:
>
> - 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.

- 34372232 – In ad hoc grids connected to Standard-mode applications, when repeated members are suppressed, the **Preserve Format** option does not preserve any formatting changes done for data cells corresponding to the repeated members. The formatting changes are lost on refreshing the grid..

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 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 13.0.2

- Office PIA 14.0

- InstallShield 2019

- Open XML SDK 2.18.0

- Zlib Data Compression Library 1.2.13

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

Access to Oracle Support

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

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