Oracle® Smart View for Office

Readme

Release 23.200

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Smart View 23.200 Readme

Related Topics

Purpose

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

New Features in Release 23.200

Related Topics

- Formula, Label, and Comment Rows and Columns Supported in Flex Forms
- Set Formatting for Numbers in Oracle Essbase
- Support for Special Characters in Oracle Essbase
- New Diagnostic Options Settings to Focus Data Collection
- New Health Check Setting to Enable Compatibility Between Smart View and Smart View (Mac and Browser)
- Compatibility of Oracle Essbase Ad Hoc Grids Between Smart View and Smart View (Mac and Browser)
- Support for Microsoft Office Themes (Including Dark Theme) for Extensions in Smart View
- Improved Experience when Submitting from Free-Form Grid with Scaling Options Enabled
- New VBA Functions
- Additional Properties Viewable in Member Information Dialog in Smart View
- View Substatus for Child Jobs in the Job Console
- Support for Calc on the Fly on Forms 2.0
- Enhanced Support for Task Manager in Smart View
- Improved Ancestor Member Access
- Narrative Reporting Features and Updates

Search for Reports, Documents, and Task Lists in Smart View

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

You can now search for reports, documents, and task lists present in your Oracle Enterprise Performance Management Cloud business process in Oracle Smart View for Office. The ability to search helps you find and access the artifacts you need faster.

This is an extension of the existing ability to search for forms, ad hoc grids, dashboards, Smart Forms, and composite forms. Earlier, the search was limited to the artifacts in the Library folder. With this enhancement, you can search within the Reports, Documents, and Task Lists folders.

> **✎ Note:**
>
> - For searching documents, your service administrator must enable the Documents folder in Smart View. This is done by setting the value of `<enableLibrary>` property to `1` in the `properties.xml` file. You can then view the Documents folder in the Smart View Home panel and search its contents.
>
> - Searching task lists requires the Oracle Enterprise Performance Management Cloud update 23.08 or later.

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. You can open an item directly from the search results. You can also right-click an item in the search results to view the context menu options specific to the selected item. 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*.

Member Selection Available for POV and Prompts in Reports

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Planning, Planning Modules, Tax Reporting; Oracle Essbase for Cloud; Profitability and Cost Management, Oracle Fusion ERP

You can now pick members for the POV and for prompts from the **Member Selection** dialog when importing or inserting a report in Oracle Smart View for Office. Users are able to choose from members to which they have access if the report designer has enabled POV dimensions to allow selecting any member or if a prompt choice list was not defined.

Once a report is imported or inserted, the **Member Selection** dialog can be used when editing the POV or prompts.

- To use the **Member Selection** dialog in prompts or the POV, report designers must do the following:

  – Clear the **Display Suggestions Only** option when defining POV dimensions

  – Do not specify a **Choice List** when defining prompts

  In both cases, users can use the **Member Selection** dialog to select the members to which they have access for the POV and prompts.

> **✎ Note:**
>
> For reports with multiple data sources:
>
> – When a dimension name is unique among the data sources, then the Member Selection dialog can be made available for the POV (clear **Display Suggestions Only**) and prompts (do not specify a **Choice List**).
>
> – When the same dimension name occurs in more than one of the multiple data sources, then a suggestions or a choice list must be defined for the POV and prompts.

- If the report designer has enabled POV dimensions to allow selecting any member or if a prompt choice list was not defined:

  – Users can select members when choosing **Edit POV** or **Edit Prompts** in Smart View.

  – **Optional:** To select members from **Member Selection** when importing or inserting a report, users must enable the **User Preferences** option, **Preview POV**, in the web business process.

With the above conditions met, to use the **Member Selection** dialog in Smart View:

1. Select a report—one with editable POV, prompts, or both—and then select either **Import Formatted Report** or **Insert**.

2. To edit the POV if **Preview POV** was selected in **User Preferences** on the web:

   a. In the **Select POV** dialog, select the drop-down menu for a POV dimension, and then click **Select…**.

   b. In the **Member Selection** dialog, choose a member for the POV and click **OK**.

   > **✎ Note:**
   >
   > In this step, and in the following steps, whenever you're setting or editing the POV or prompts, ensure that you choose only one member in the **Member Selection** dialog.

3. To edit prompts when importing or inserting a report:

   a. In the **Select Prompts** dialog, click the ellipsis button (**…**) for a grid dimension.

   b. In the **Member Selection** dialog, choose the member for the prompt, and then click **OK**.

4. To change the POV of an imported or inserted report, in the Smart View ribbon, click **Edit POV**, then select the drop-down menu for a dimension, and then click **Select…**; in the **Member Selection** dialog, choose the member for the POV, and then click **OK**.

5. To change the prompts of an imported or inserted report, in the Smart View ribbon, click **Edit Prompts**, and in the **Member Selection** dialog, choose the member for the prompt, and then click **OK**.

> **Note:**
>
> For prompts which have a default selection but no defined choice list, the **Edit Prompt** dialog will not show the selected member if the member was changed when importing.

For more information, see:

- Designing with Reports for Oracle Enterprise Performance Management Cloud
- Working with Reports for Oracle Enterprise Performance Management Cloud
- Importing and Working with Fully Formatted Reports in *Oracle Smart View for Office User's Guide*

Insert Multiple Reports in the Same Workbook

Applies to: Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Narrative Reporting, Planning, Planning Modules, Tax Reporting; Oracle Essbase for Cloud; Profitability and Cost Management, Oracle Fusion ERP

The new "Insert Formatted Report" command allows you to add, or *insert*, multiple reports into a single Excel workbook.

With the new **Insert Formatted Report** command in the Action Panel or right-click menu, you may insert into a single workbook:

- Multiple-page reports
- Single-page reports
- Reports from different data sources

Using **Insert Formatted Report**, all the reports can be included in the same workbook.

Previously, each report was imported into separate workbooks.

To insert multiple reports into one workbook:

1. In the tree in the Smart View Panel, select the first report to add to your workbook, and click the **Insert Formatted Report** command in the Action Panel, or right-click the report name, and select **Insert Formatted Report**.

> **Note:**
>
> To add multiple reports to a workbook, you must always begin by selecting the **Insert Formatted Report** command; do not use **Import Formatted Report**.

2. Select the next report to add, and use the Action Panel or right-click menu option to select **Insert Formatted Report**.

3. Repeat the previous step until all the reports you require have been added to the workbook using the **Insert Formatted Report** command.

4. Continue working with your reports as required; for example, edit the prompts or POV.

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

New Search Field in Business Rules Dialog

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

The Business Rules dialog in Oracle Smart View for Office now contains a Search field, where you can search for business rules and rule sets to run.

Launch the **Business Rules** dialog from the provider ribbon or provider ad hoc ribbon by selecting **Calculate**, and then **Business Rules**. For forms only, you may select **Calculate**, and then **Rules on Form**.

In the **Business Rules** dialog, type your search criteria in the **Search** field, and then press **Enter** or click the arrow at the right of the **Search** field. For example, you may search for all rules and rule sets that contain the string `expense`. After pressing **Enter** or clicking the arrow, the results list shows all business rules or rule sets that contain "Expense" anywhere within the name: beginning, middle, or end.

When you first launch the **Business Rules** dialog, all cubes and rule set check boxes are selected by default. You may optionally narrow the search by clearing the check boxes for cubes and rule sets that you do not need to see, and then enter your search criteria.

The new Search field in the Business Rules dialog helps you to more easily locate the business rules that you want to run.

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

- Launching Business Rules in Excel in "Smart View and EPM Cloud"
- Launching Business Rules in Excel in "Smart View and Oracle Hyperion Planning"

Formula, Label, and Comment Rows and Columns Supported in Flex Forms

In Oracle Smart View for Office, you can now retain formula rows and columns on flex forms by enabling the "Show invalid members for flex form" option during form definition. When this option is enabled, formula rows and columns are retained on the flex form after a refresh or a submit.

After a refresh or submit operation, all members and data on a formula row or column are highlighted using the same cell style as used for invalid members.

Previously, formula rows and columns were not supported in flex forms. Upon submit, a message noted that a refresh must first be performed; and upon refresh, the formula rows and columns were removed from the flex form.

> **✎ Note:**
>
> - Formula rows and columns are also referred to as *label* or *comment* rows and columns.
>
> - 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, select the entire row or column, right-click, and then select **Delete** from the Excel context menu.

Enabling the **Show invalid members for flex form** option gives users the versatility of flex forms when working with forms containing formula rows and columns.

To retain formula rows and columns in flex forms, 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.
   During form design, 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.

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

Set Formatting for Numbers in Oracle Essbase

Applies to: Oracle Essbase on Oracle Cloud Infrastructure via Marketplace (Essbase Cloud), Oracle Essbase on Independent Deployments (Essbase On-premises)

You can now set formatting for numbers in Oracle Essbase ad hoc grids using Smart View Options.

To set the formatting options, click **Options** on the Smart View ribbon, and then click **Formatting** in the **Options** dialog box. The following existing formatting options present in the **Number Formatting** section are now enabled for Essbase:

- **Use Custom Number Format:** Apply custom formatting to numbers to gain more control and flexibility for customizing the appearance of numbers. Select this check box and enter a valid format. For example, `$#,##0.000_);[Blue]($#,##0.000)`. Custom number format overrides other formatting settings set in the Number Formatting section.

- **Use Thousands Separator:** Set a comma or other thousands separator in numerical data.

- **Decimal Places:** Select the decimal places to be displayed for numeric data values. You can select to display up to 30 decimal places and preview the format.

- **Negative Number Format:** Select the format in which negative numbers must be displayed and preview it. The formats include Default (which displays the minus sign), Parentheses, Red Color, and Parenthesis and Red Color.

> ✏️ **Note:**
>
> For Essbase, if the number formatting options are not set or retained as default in Smart View Options, then the existing behavior of using the General format for numbers will continue for Essbase grids.

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

Support for Special Characters in Oracle Essbase

Applies to: Oracle Essbase on Oracle Cloud Infrastructure via Marketplace (Essbase Cloud)

Oracle Smart View for Office now supports the use of special characters in member names and aliases in Oracle Essbase ad hoc grids. The following special characters are supported:

- Equal To sign (=): For example, =units, =sales

- Single Quote sign ('): For example, 'price, 'margin

For more information on Essbase naming conventions, see Application Workbooks Reference in the *Using Oracle Essbase*.

New Diagnostic Options Settings to Focus Data Collection

New settings are added to the Diagnostic Options dialog to help in focusing the data that is collected when running diagnostics in Oracle Smart View for Office.

A new section in the dialog, labelled **Include (check all required)** provides the following options for these diagnostic areas:

- **Memory data**
- **Detailed network data**
- **API calls diagnostics**
- **Reporting diagnostics**—Selected by default
- **Detailed grid-related diagnostics**—Selected by default
- **Metadata diagnostics**—Selected by default

As noted above, certain items are selected by default. In many cases, these are all that is needed for diagnosing your issue.

You may select the remaining items if you feel those are the problem area or if you are advised by Oracle Support to do so. You may also deselect items that you feel are not relevant to your issue.

As an added security measure, starting in this release, the **Mask Data** check box is now selected by default. You can choose to clear the check box, if your issue requires it.

For information on using Diagnostics in Smart View, see the topics on diagnostics in Smart View Diagnostics and Health Check in the *Oracle Smart View for Office User's Guide*.

New Health Check Setting to Enable Compatibility Between Smart View and Smart View (Mac and Browser)

A new setting called **Compatibility** has been added in the **Health Check** dialog of Oracle Smart View for Office. This setting is used to enable or disable the compatibility of forms and ad hoc grids (Standard mode) between Smart View for Office and Smart View for Office (Mac and Browser).

When compatibility is enabled, you can work on a form or an ad hoc grid in Smart View on your desktop version of Microsoft Excel, refresh or submit the changes before closing the sheet, and open the same form or grid in Excel 365 on a Mac or on browser using Smart View (Mac and Browser) to see the changes you made earlier and continue working on it.

Introduced first in release 23.100, service administrators had to enable compatibility for 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`). The new **Health Check** setting offers an easier way of enabling compatibility from the Smart View user interface, in addition to enabling it from the `properties.xml` file.

In the **Health Check** dialog, the **Compatibility** setting is present under **Smart View Options** and is **Disabled** by default.

- To enable it, click in the **Fix/Update/Help Link** column, select **Enable**, and then click **Update Settings**.

- To disable it, click in the **Fix/Update/Help Link** column, select **Disable**, and then click **Update Settings**.

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

- Working Compatibly on Forms and Ad Hoc Grids Between Smart View and Smart View (Mac and Browser)

- Performing a Health Check On Your System

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

Applies to: Oracle Essbase on Oracle Cloud Infrastructure via Marketplace (Essbase Cloud)

Starting 23.200, compatibility of Essbase regular ad hoc grids is supported between Smart View for Office and Smart View for Office (Mac and Browser). Regular ad hoc grids in Essbase 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).

> ✎ **Note:**
>
> - Multiple-grid ad hoc sheets are not compatible between Smart View products.
>
> - Compatibility for EPM Cloud forms and ad hoc grids is already supported since Oracle Smart View for Office 23.100 release.

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) for Extensions in Smart View

Applies to: All

You can now apply a theme of your choice and customize your Office application while working with the Smart Query, Oracle Journals for Financial Management, and Oracle BI EE extensions for Oracle Smart View for Office.

These extensions when used with Smart View 23.200 support 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 Smart Query ribbon and panel, Oracle BI EE ribbon and View Designer, Oracle Journals ribbon, and related menus and dialog boxes.

Office themes are already supported for the Narrative Reporting extension and the EPM Books extension since Smart View 23.100 release.

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 Theme** list.

3. Click **OK**.

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*.

Improved Experience when Submitting from Free-Form Grid with Scaling Options Enabled

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

When attempting a free-form submit with scaling options enabled, and using the **Submit** button in the Smart View ribbon or provider ad hoc ribbon, the following warning will be shown:

```
You are in free-form mode. Perform a Refresh before Submit.
```

Click the **Details** button, and the following note is displayed:

```
Free-form submit is not allowed when scaling is enabled.
```

Using the **Submit Data Without Refresh** or **Submit Data Range** options on the **Submit** button in the provider ad hoc ribbon, the following warning will be shown:

```
To submit scaled data, refresh the grid and submit. You are attempting
free-form submit; data will not scale per scaling options and will be
submitted as is. Do you want to continue?
```

If you decide to submit after viewing this message, then the data will be submitted as is.

Additionally, for any free-form submit, a status will now be shown in the Excel status bar until the submit processing is completed (this status remains depending on the processing time). The status is added to let you know that the values are being submitted as is, without considering the dirty status or scaling options set.

> **Note:**
>
> For EPM Cloud sources only:
>
> *   To take advantage of this feature, the **Smart View Ad Hoc Behavior** option in your application must be set to **Standard**.
> *   This feature applies to ad hoc grids in free-form mode and flex forms.

New VBA Functions

This release introduces these new VBA functions:

*   HypLoginEssbaseCloudBasicAuth
*   HypSetBasicAuthToken

HypLoginEssbaseCloudBasicAuth

Applies to: Oracle Essbase for Cloud

The HypLoginEssbaseCloudBasicAuth function is specifically designed for use with Essbase for Cloud only. It requires users to use the ""/essbase/rest/v1/session"" rest endpoint URL for generating the login token.

> **Note:**
>
> This VBA function is for use in Oracle Essbase Cloud environments that support Basic Auth authentication. This function will not work with the APS_ONLY deployment type on-premises Essbase environments.

See HypLoginEssbaseCloudBasicAuth in the *Oracle Smart View for Office Developer's Guide*.

HypSetBasicAuthToken

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

The HypSetBasicAuthToken function authenticates users using the Basic Auth mechanism in supported cloud instances. It bypasses regular form-based authentication.

This function is useful for environments that support Basic Auth for all protocols.

See HypSetBasicAuthToken in the *Oracle Smart View for Office Developer's Guide*.

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 Smart List and Source Cube Information.
    - The newly added properties specific to dimension type are as follows:
        * Currency: Scale, Precision, Reporting Currency, Thousands Separator, Decimal Separator, Negative Sign, Negative Color
        * Scenario: Exchange Rate Table

- **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*.

View Substatus for Child Jobs in the Job Console

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

You can now view the substatus for ongoing jobs in the **Job Status** column of the Job Console. With the new substatus information, you can:

- Track the real-time progress of a job. This helps you stay informed, especially for jobs that run for long durations.

- Get a better understanding of the ongoing activities. By receiving substantial information about ongoing jobs upfront, you save time and efforts required to open the details of each individual job.

- Easily identify where a job is blocked or running slower than usual. This helps you understand incompatibilities within jobs, take quick actions, and improve job processes.

In Oracle Smart View for Office, you can launch the **Job Console** by right-clicking the application name and selecting **Job Console** from the context menu. Alternatively, you can click **More** in the **Action** panel menu and select **Job Console**. The status of a job along with its substatus appears in the **Job Status** column.

For jobs with no child jobs, the status appears in the format of Job Status: [Sub_Status]. For example, Processing: Merging Data

For parent-child job relationships, the substatus appears in the following format:

- The parent job displays the ongoing child job. For example:

  Processing: [Executing Child Job 1 Of 1: %CHILD_JOB_NAME%]

- Each child job displays the specific operation being performed as part of its execution. For example:

  Processing: [Step 3 Of 5: Fetching source data]

- If a cube is busy with the current job, a Waiting indicator is appended to the status. For example:

  Processing: [Step 5 Of 5: Clearing and pushing data to target[Waiting].]

After a job is completed successfully, the substatus is cleared. However, if the job encounters any errors, then the job status and substatus where the error occurred continues to display, instead of getting cleared. For example, Error: [Step 2 Of 5: Fetching target data].

For more information, see Monitoring Job Status in the *Oracle Smart View for Office User's Guide*.

Support for Calc on the Fly on Forms 2.0

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

You can now perform calc on the fly calculations on Forms 2.0 in Oracle Smart View for Office. You can change data values to view the calculations quickly in forms containing member formulas.

Calc on the fly is available only in Forms 2.0 for applications on which the Redwood Experience has been enabled. Ensure that the **Forms Version** is set to **Forms 2.0** under **Settings** in the web application. Also, the calc on the fly feature needs to be enabled for each form on which you wish to perform calc on the fly. To do so, select the **Enable Calc on the Fly** check box under **Grid Properties** in the **Layout** tab of the required form.

With calc on the fly enabled for Forms 2.0, on opening the form in Smart View, you can hover on cells containing member formulas to view the formula details in tooltips. You can save calculation time by making multiple changes to the form and viewing the calculated values instantaneously, without reloading the form every time. When you have completed all your changes and are satisfied with the calculations, you can then submit the changed values to the database. Or you can close without submitting your updated values.

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

- Performing Calculations Without Having to Submit Your Changes (Calc on the Fly)
- Performing Calc on the Fly on Forms 2.0

Enhanced Support for Task Manager in Smart View

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

While accessing the Task Manager from Oracle Smart View for Office, users can now experience better usability with automatically resized columns, gain quicker access to task details, and navigate easily within integrated tasks using embedded task links.

The following enhancements are included:

- In the schedule sheet, all columns are automatically resized based on content for better visibility and usability.

- New options are now available to open tasks quickly from Smart View. You can access these options from the **Task Manager** ribbon and from the new **Quick Actions** column in a schedule sheet. The options are as follows:

  - **Open:** Use this option to open task details in the **Task Manager Task Dialog**. You can use this open as an alternative to double-clicking a task row in the schedule sheet to launch the **Task Manager Task Dialog**.

  - **Open in Browser:** Use this option to open integrated tasks in the web application within a browser quickly. If you have not logged in to the web application in the current session, you will be prompted to establish a

connection and log in as a one-time requirement. Thereafter, you can open integrated tasks directly in the browser, view the task details, and take necessary actions.

– **Open in Excel:** Use this option to open embedded artifacts like forms and dashboards in Excel quickly. Forms open in a new worksheet within the same workbook, while dashboards open in a new workbook.

• For integrated tasks, embedded task links are now available in the task details within the **Task Manager Task Dialog** to help you navigate to the relevant tasks easily. For example, if the task is about Reviewing Financial Reports and you click **Open in Browser**, you will see a **Go to View Financial Reports** link in the **Task Manager Task Dialog**. This way, you can view the contextual information (that is, the financial reports in this example) directly within the Task Dialog, instead of separately navigating from the web application.

> ✎ **Note:**
>
> The above enhancements require the 23.12 Task Manager extension.

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

• Viewing Schedules and Tasks

• Installing and Connecting to the Task Manager Extension

Improved Ancestor Member Access

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

Using the new **Default Ancestor Access** option to automate access assignment, EPM Cloud users in the web and in Oracle Smart View for Office are now able to zoom out to ancestors and see the hierarchy in a tree view, even when, prior to this feature, they wouldn't have had access to the members at the parent level. This feature enhances existing member security to provide a choice of default access to ancestor members. Service administrators can set the default access for ancestors to **None**, **Read**, **Write**, or **Display** access in the application. They can also grant Read, Write, or Display access to one or more ancestors in, for example, the Dimension Editor. In these cases, the explicit security assignment made in the Dimension Editor takes precedence, unless the access set in the Dimension Editor is set to None, in which case the **Default Ancestor Access** setting takes precedence.

Service administrators use the new **Default Ancestor Access** option to specify default user access to the ancestor members of members with access other than **None**, including shared members. This enables Smart View users to view the members that they have access to in context of the subhierarchies that they are part of in, for example, ad hoc grids or the Member Selector.

> **✎ Note:**
>
> The user will not see subhierarchies unless they have access to at least one descendant member.

The available **Default Ancestor Access** options in the application are:

* **None**—By default, users are not able to see the ancestor members of members that they have access to unless they are explicitly granted access to them. When this option is selected, the system works the same way it did prior to the 24.03 update.

* **Read**—By default, users are granted Read Only access to the ancestor members of members that they have access to unless they are explicitly granted **Write** or **Display** access, which would override this default.

* **Write**—By default, users are granted Write access to the ancestor members of members that they have access to unless they are explicitly granted **Read** or **Display** access, which would override this default.

* **Display**—By default, users are granted Display Only access to the ancestor members of members that they have access to unless they are explicitly granted **Read** or **Write** access, which would override this default. Note that members with Display Only access will be displayed, but instead of data values in the cells associated with those members, users will see #NoAccess.

In addition to the **Default Ancestor Access** application setting, note that these access options have also been added wherever you find security on members; for example, in the Dimension Editor.

The new **Default Ancestor Access** option for the application and dimensions gives Service Administrators a simpler way to apply access to hierarchy members, and provides users with clearly navigable hierarchy structures in, for example, ad hoc grids and the Member Selector, both in the web and in Smart View.

> **Note:**
>
> - If **Write** access is selected as the default, the ancestors may still be read-only if other features such as Bottom Up Versions, Dynamic Calc, the presence of a supporting detail, and others, set the cell back to read-only. The **Write** value is primarily provided for customers using either FreeForm, or Target Versions.
>
> - **Default Ancestor Access** applies to ancestors after shared member security is evaluated. This allows it to work correctly both whether the **Include Shared Members in Cube Refresh** option is enabled or disabled.
>
> - Enabling **Default Ancestor Access** facilitates the sharing of Excel workbooks between users having different levels of access to members. When access is configured, and users click **Refresh** in Smart View, cells to which they have access will come back with actual data values (or #NoAccess) and the hierarchy structures are maintained.

For information on working with ancestor members in Smart View, see Accessing Ancestor Members in Ad Hoc Grids in the *Oracle Smart View for Office User's Guide*.

Narrative Reporting Features and Updates

Related Topics

- Narrative Reporting 24.02 Extension Update
- Narrative Reporting 23.12 Extension Update
- Narrative Reporting 23.10 Extension Update

Narrative Reporting 24.02 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:

- Change of Behavior: The Doclet Attribute Dialog is No Longer Presented When Using the Upload and Check In Option in Smart View
- Create Available Content Quickly in Smart View
- New Option to Disable Automatically Resize Table Content for Embedded Word Tables in a Report Package

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 *Oracle Smart View for Office User's Guide*

- 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*

Change of Behavior: The Doclet Attribute Dialog is No Longer Presented When Using the Upload and Check In Option in Smart View

During the doclet check-in process, you can now bypass the **Style Sample** or **Slide Master** attribute dialog and directly check in a Microsoft Word or PowerPoint doclet when you use the **Upload and Check In** option on the **Check In** button in the **Narrative Reporting** ribbon in Smart View. When you select this option, any existing page attribute override selections will be maintained.

When uploading a Word or PowerPoint doclet, the **Doclet Attribute** dialog is displayed where you are asked to review style sample attributes (Word) or slide master attributes (PowerPoint), and select any attributes you wish to override. Previously, the **Doclet Attribute** dialog was displayed whether you selected the **Upload** button or the **Upload and Check In** option available on **Check In** button.

With the 24.02 Narrative Reporting extension, you can quickly upload and check in a doclet, and avoid the **Doclet Attribute** dialog by selecting the **Upload and Check In** option on the **Check In** button. Any selections you made previously in the Doclet Attribute dialog are maintained.

Bypassing the **Doclet Attribute** dialog allows you to more quickly check in doclets when no attribute review or override is required.

> ✎ **Note:**
>
> - The **Doclet Attribute** dialog is still available when you select the **Upload** button.
>
> - This feature requires the 24.02 Narrative Reporting extension.

For more information, see Uploading and Working with Page Attributes and Slide Masters in *Oracle Smart View for Office User's Guide*.

Create Available Content Quickly in Smart View

You can now quickly create available content using the new **Available Content** button in the Narrative Reporting ribbon in Oracle Smart View for Office.

In an Excel reference doclet or reference file, you simply select the table or graphic content, then click the **Available Content** button.

This launches the **Define New Available Content** dialog. The range you selected is entered by default in the **Excel Range** text box. You provide a name and optional description for the new available content, then click **OK**.

Previously, you were required to first define named ranges in the Excel reference doclet or reference file, before creating available content. Using the **Available Content** button in the Narrative Reporting ribbon, the underlying named range is automatically created for you based on the range you select in Excel. You have only to apply a name and optional description to the new content.

When you create new available content using the **Available Content** button, do not check out the reference doclet or regular doclet to which the reference file belongs. Before you begin, ensure that the doclet is checked in.

Once you click **OK** in the **Define New Available Content** dialog, the new content is available for embedding in your Word or PowerPoint doclet.

You can save time by creating available content quickly using the new **Available Content** button in the Narrative Reporting ribbon in Smart View.

> **✎ Note:**
>
> - This feature requires the 24.02 Narrative Reporting extension.
> - When creating available content from a chart, or graphic, be sure to include the row above and below the chart in your selection.

In the *Oracle Smart View for Office User's Guide*, see:

- Creating Available Content Using the Available Content Button in Reference Doclets
- Creating Available Content Using the Available Content Button in Reference Files

New Option to Disable Automatically Resize Table Content for Embedded Word Tables in a Report Package

When you embed a table within a Microsoft Word Doclet, the available content is converted into a Word table. The Word tables have a default option, **Automatically Resize Table Contents**, which adjusts the column widths and row heights slightly for optimal rendering. This resizing may introduce discrepancies between the embedded table and the source table or grid. You can now disable the resizing option on the available content definition to minimize the variations between the embedded Word table and the source reference table or grid.

Within a Word or PDF Report Package, you can disable the automatic resizing option on available content tables. Then, when the available content table is embedded in a Word doclet, the Word table option will not be enabled. By default, this option is enabled for the available content.

To disable the automatic resizing option in Smart View:

1. In a checked out doclet, click **Inspect** in the Narrative Reporting ribbon, then select the **Available Content** tab, and then click the link for the available content to change.

2. In the **Edit** dialog, clear the **Automatically Resize Table Contents** checkbox, and then click **OK**.

This enhancement provides you the ability to enable or disable the resizing option, based on your requirements and preferences.

> ✎ **Note:**
>
> - This feature requires the 24.02 Narrative Reporting extension.
>
> - In Oracle Smart View for Office, when you create new available content using the Excel named range method, the **Automatically Resize Table Contents** option is displayed upon upload in the **Add Report Content** dialog when you click the link for the new content. The option is not displayed when you create available content using the new **Available Content** button in the 24.02 Narrative Reporting extension update. In Smart View, to clear the check box for content created using the **Available Content** button, use the steps noted above.

For more information, see Updating Excel-based Reference Doclet Content in *Oracle Smart View for Office User's Guide*.

Narrative Reporting 23.12 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 the Narrative Reporting feature, Easily Locate the Source of Reference Variable Values in Smart View.

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 *Oracle Smart View for Office User's Guide*

- 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*

Easily Locate the Source of Reference Variable Values in Smart View

You can now easily view all reference variables sourced in a doclet from the **Sourced** tab in the **Variables** panel, and locate a reference variable value's source within your doclets using the **View Source** action in Smart View

From the new **Sourced** tab in the **Variables** panel, you can view all reference variables sourced from the current doclet. The **View Source** action, available from the **Sourced** tab, will quickly locate the cell or text where a reference variable currently gets its value.

Use the **View Source** action to locate a reference variable value's source in Excel reference doclets and reference files. In Word- and Excel-based regular doclets, you can also locate a reference variable value's source if the doclet is also the source of the reference variable's value. You can also open a reference doclet at any time and perform the **View Source** action on any of the variables.

For more information, see Locating the Source of Reference Variable Values in the *Oracle Smart View for Office User's Guide*.

Narrative Reporting 23.10 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:

- Preview Available Content before Embedding in Smart View
- View Available Content Name in Doclets in Smart View

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 *Oracle Smart View for Office User's Guide*
- 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*

Preview Available Content before Embedding in Smart View

Authors can now preview available content before embedding it in a doclet using the new **Show Preview** button in the **Embed Contents** dialog in Oracle Smart View for Office.

After opening and checking out a Word or PowerPoint doclet in Smart View, click the **Embed** button in the Narrative Reporting ribbon. In the **Embed Contents** dialog, you'll see the list of available content and the new **Show Preview** button.

Select an available content, click **Show Preview**, and see a preview of the content in the preview pane below the list of available content. For example, if you select a

monthly sales chart in the available content, you can see the visual of the bar chart in the preview pane. Similarly, if you select a balance sheet statement, you can see its preview in table format.

Scroll bars can be used when the image or table is too large to fit in the preview pane. You can select one available content at a time to preview. To close the preview pane of the dialog at any time, click the **Hide Preview** button.

Once you locate the available content you are satisfied with, click the **Embed** button at the top of the dialog to insert this available content in the document or slide. This action closes the dialog.

The **Show Preview** feature gives doclet authors an easy way to view available content before it's embedded. Note the following considerations while using this feature:

- This feature requires the 23.10 Narrative Reporting extension.

- You must first check out a doclet in order to see the **Embed** button on the Narrative Reporting ribbon. Click the **Embed** button to launch the **Embed Contents** dialog.

- The **Embed Contents** dialog is not resizable. Use the scroll bars to view parts of the image that are not immediately visible.

- This **Embed Contents** dialog displays best your system's Display settings, under Scale and layout, is set to 100%.

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

View Available Content Name in Doclets in Smart View

When you are embedding available content in your Word or PowerPoint doclet using Oracle Smart View for Office, the available content name, or title, is now being included. This allows you to quickly identify the source for the available content.

In the past, or when embedded via the browser, the names were not added so were not viewable from within the doclet. To add the names to these contents, perform a **Refresh Embedded Content** in Smart View.

Available content can come from Excel- and Reports-based reference doclets and reference files. For example, in Excel-based reference doclets, you use named ranges to define available content, which can then be embedded in a doclet. You can view the name of the available content in the **Embed Contents** dialog.

With the 23.10 Narrative Reporting extension, after embedding content, you can select the content in the doclet and view its name. This gives you a quick way to know the name of content that has been embedded in a doclet

In PowerPoint, to view an embedded content name, select the embedded content, right-click and, depending on your Office version, select **View Alt Text** or **Edit Alt Text**. The name of the embedded content appears in the **Alt Text** panel.

> **Note:**
>
> You must open and check out a doclet in Smart View, perform a **Refresh Embedded Content**, then upload and check in the doclet to ensure that the available content name displays correctly in these situations:
>
> - If content was embedded in a Word or PowerPoint doclet using a Narrative Reporting extension version earlier than 23.10
>
> - When content is embedded in a Word or PowerPointdoclet from Narrative Reporting web
>
> - After changing the name of an available content from Narrative Reporting web or from Smart View

For more information, see Viewing Available Content Name in Doclets in the *Oracle Smart View for Office User's Guide*.

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 (23.200 and 23.100) of Oracle Smart View for Office against current products on Premier Support.

Microsoft Windows Operating System and .NET Support

Oracle Smart View for Office 23.200 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 EPM Cloud 20.09 update and EPM System 11.2.2 release, Internet Explorer 11 is no longer supported, based on the Microsoft recommendation that Internet Explorer users move to the new Microsoft Edge as their default browser. Because Oracle will no longer test EPM Cloud and EPM System using Internet Explorer, existing functionality that currently works with Internet Explorer may no longer work starting with the 20.09 update or release 11.2.2. For more information, see Browser Version Support.
>
> Oracle recommends that 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 Oracle Smart View for Office 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.
> - Oracle BI EE does not support WebView2. WebView2 must be disabled when connecting to Oracle BI EE. Use the Health Check dialog to disable WebView2.
> - For two-factor authentication login scenarios, in the **Health Check** dialog, the **WebView2 Runtime** option must be set to **Enable for UI**.
> - Starting with the 21.100 release, Smart View supports WebView2. Full support for WebView2 starts in release Smart View 23.210, which can be obtained on My Oracle Support.

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 (present by default in `C:\Oracle\SmartView\cfg`) and then distribute this file to users.

These are the configuration settings for enabling and disabling WebView2 in `properties.xml`:

- **Enable For All**:

  `<disableWebView2>`**0**`</disableWebView2>`

  `<useWebView2forNetworking>`**1**`</useWebView2forNetworking>`

- **Enable for UI**:

  `<disableWebView2>`**0**`</disableWebView2>`

  `<useWebView2forNetworking>`**0**`</useWebView2forNetworking`

- **Disable** (the default):

  `<disableWebView2>`**1**`</disableWebView2>`

  `<useWebView2forNetworking>`**0**`</useWebView2forNetworking>`

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 23.200 from the following releases:

Table 1-1   Supported Paths to this Release

Release Upgrade Path From	To
21.xxx	23.200
22.xxx	23.200

Backward Compatibility

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

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

Defects Fixed in This Release

Related Topics

- General
- EPM Cloud

- Financial Management
- Narrative Reporting
- Reports

General

- 35338878 – Changes made offline will be retained when users perform a **Submit** or **Submit Without Refresh** before retrieving the data or performing a refresh.

- 35403191, 35653918 – When the option, **Freeze Row and Column Headers**, is enabled, performing any of the following actions after modifying a data cell no longer resets the form or ad hoc grid view to the top:
    – Pressing **Enter** key
    – Pressing **Tab** key
    – Clicking out of the modified cell

    The **Freeze Row and Column Headers** option is located in the Smart View **Options** dialog, **Formatting** tab.

- 35248617 – Issues with number formatting in localized languages are corrected when using color and parentheses color for negative numbers.

- 35317497 – Double-clicking on a date field no longer loses unsaved data.

- 35333783, 35631615, 35761653, 35765274 – Performance is improved when working with a form or ad hoc grid containing Smart List cells. Areas of improvement include opening the form or grid, selecting the Smart List cell, refreshing, and submitting.

- 35446110 – Members can be typed in below the ad hoc grid. Then, by selecting the entire grid, a refresh will retrieve the values for the added members.

- 35498921 – Adjust cell functionality no longer gives a wrong result when some of the selected rows have a hidden row between them.

- 35627095 – A Refresh operation retrieves data on the first attempt when a locally saved ad hoc grid, which contains one or more POV members referenced from another sheet, is opened.

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+.

- 35338878 – Changes made offline in ad hoc sheets are now retained correctly after connecting to the data source, if the Submit Data or Submit Without Refresh option is used before retrieving the data or doing a refresh.

- 35140930 – The Manage Approvals window now appears correctly on laptop and external monitors, including high resolution monitors.

Financial Management

- 34335992 – In forms, custom background colors for row and column headings are now honored when forms are opened in Smart View.

- 35313686 – With WebView2 enabled and using single sign-on, you can now successfully log in to Oracle Hyperion Financial Management using a private connection.

- 35556029 – When the journal name contains special characters, such as `&`, the Oracle Journals tab now displays properly when switching from one sheet to another in Excel.

Narrative Reporting

Server-initiated refresh is now supported for Smart View HsGetValue() functions built with Excel cell references.

In the Excel file, define the connection for the function as:

```
URLFN|URL|Server|Application|Database
```

If your workbook contains HsGetValue functions that use cell references pointing to a private connection name, note that private connections are not portable across machines, and so are not supported by server-initiated refresh. Oracle recommends that you convert those functions to use the URLFN format.

See the following topics in *Working with Oracle Smart View for Office*:

- For information on the portable URLFN connection format, see HsGetValue

- For information on server-initiated refresh, see Working with Server-Initiated Refresh

Reports

- 35317450 – Brackets, `[]`, in a report name no longer cause issues when importing the report in to Oracle Smart View for Office. Note that upon import, brackets are removed from the name displayed in the Excel title bar and worksheet tab.

- 35445125 – Default prompts are chosen correctly and any other prompt in the list with duplicate member names is no longer selected by default.

Known Issues

Related Topics

- General
- EPM Cloud

General

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

- 33992974 – When working in a two-monitor scenario using a laptop screen and an external monitor screen in extended mode, Oracle Smart View for Office may not able to recognize selections in the POV. This is due to having different resolution and scaling settings on each screen, which can result in false clicks where some UI clicks are not captured.

  Workaround: If your display resolution settings are different between the laptop monitor and the external monitor with extended display, use the same scale settings on both screens. For information on monitor display settings, see the Microsoft article, How to use multiple monitors in Windows.

- 34032813 – After installing Smart View 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 launch certain dialogs, the **Script Error** dialog is displayed if WebView2 is disabled; for example, you launch the **Instructions** dialog, and the instructions area is blank and the **Script Error** dialog is displayed.

  Workaround: In the **Health Check** dialog, ensure that WebView2 Runtime is installed and select **Enable for UI**, described in Performing a Health Check On Your System in the *Oracle Smart View for Office User's Guide*.

- 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.

- 36081385 – In Oracle Smart View for Office 23.100 and earlier, when working with saved workbooks containing dimension sheets, performing a Refresh on a sheet causes expanded dimensions to be reset to their top parent level and properties to display twice on columns.

  Workarounds:

  – To avoid this issue, Oracle recommends moving to Smart View release 23.110 or later.

  – If you are not updating Smart View at this time, then perform the following procedure in the saved dimension workbook:

    1. Open the workbook and connect to the provider.

    2. Go to any dimension sheet in the workbook and select any member, then press the **F2** key, then press the **Enter** key, and then click **Refresh**.

    3. Repeat the previous step for all dimension sheets in the workbook, and then save the workbook.

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.

- 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.

- 35673349 – In certain scenarios, the Windows **File Download** dialog erroneously appears. You must click the **Close** button, **X**, in the upper-right corner of the dialog to close it and continue. These are the scenarios where this may occur:

  – When a report is set up where the grid data source of the report is pointing to an environment in a different domain than the one with which you originally logged on, the user performs a member selection from the **Edit POV** dialog, clicks **OK** to download the new report with the updated POV, and multiple authentication prompts appear. In the end, the **File Download** dialog is displayed.

  Click the **X** in the upper-right corner of the dialog and launch the **Edit POV** dialog again but choose members from the drop-down list instead of the **Member Selection** dialog.

  – A report is opened for an extended period of time in Excel, which has resulted in a session time out. When the user refreshes report, the **File Download** dialog may display.

  Click the **X** in the upper-right corner of the dialog and retry the refresh.

- 36183346 – A flex form with the **Show invalid members for flex form** option enabled in the form definition will have issues if any of the suppression options are selected in the form definition (**Suppress missing data – rows** and **Suppress missing data – columns**) or in Smart View **Data Options** (**No Data / Missing** option in **Suppress Rows** or **Suppress Columns**). Oracle recommends that you

do not use these suppression options when **Show invalid members for flex form** is enabled.

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
- Other Documentation Updates
    In addition to documentation updates resulting from new features and fixed defects, the Smart View documentation was also updated for the items listed in this topic.

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 **See All** under **Cloud Applications**, **Fusion Applications Suite**, 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 **See All** under **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 Oracle Technical Resources (https://www.oracle.com/technical-resources/) and on the Oracle Software Delivery Cloud website (https://edelivery.oracle.com).

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.

Other Documentation Updates

In addition to documentation updates resulting from new features and fixed defects, the Smart View documentation was also updated for the items listed in this topic.

Related Topics
- Excel Grouping Guideline
- Submitting Text Datatype in Free-Form Mode

Excel Grouping Guideline

35011269 – Excel grouping is expanded in two cases:

- Filters are used. In this case, grouping is expanded on rows.
- **Adjust Column Width and Row Height** is checked (**Options** dialog, **Formatting** tab).

If you want to preserve Excel grouping, do not use filters or the **Adjust Column Width and Row Height** option. The Excel grouping expanded/collapsed state cannot be restored programmatically, and Excel automatically expands everything if filtering is applied or the row height/column width is automatically adjusted.

Submitting Text Datatype in Free-Form Mode

35623418 – When updating text datatype values in free-form mode, the **Submit Without Refresh** action should be used. This applies to Standard Ad Hoc mode only (the application setting, **Smart View Ad Hoc Behavior**=Standard.)

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

Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

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.

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