Oracle® Smart View for Office

Readme

Release 24.200

G13041-07

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Smart View 24.200 Readme

Related Topics

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Purpose

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

New Features in Release 24.200

Related Topics

- Refresh Data as is in Ad Hoc Grids in Saved Worksheets
- Retain Numeric Comments on Refresh
- Register Unregistered DLLs Using Health Check
- View Network Traffic Details in Real Time with Smart View's New Trace Traffic Tool



- Submit Data when Flex Forms Contain Invalid Members
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Refresh Data as is in Ad Hoc Grids in Saved Worksheets

A new option, **Refresh Saved Sheet as is (Ad Hoc Standard Mode)**, is introduced in Smart View Options to retain data when ad hoc grids (EPM Cloud Standard mode or Essbase) in saved worksheets are refreshed in Oracle Smart View for Office.

Earlier, data updated in ad hoc grids in saved sheets would be lost upon refreshing the sheet in the following scenarios:

- The sheet was modified outside Smart View, that is updated and saved without installing Smart View.
- A dimension sheet or workbook, that was updated and saved using Smart View Admin Extension version 23.210 or earlier, was refreshed in the later versions.
- A sheet containing formulas localized in different languages is saved and shared with users having different language setups. For example, VLOOKUP (English) / BUSCARV (Spanish).

The new option, **Refresh Saved Sheet as is (Ad Hoc Standard Mode)**, resolves the above issues faced while refreshing saved sheets, including dimension workbooks. When this option is selected, Smart View considers the updates done to the ad hoc grid and refreshes the saved sheet accordingly. For example, a user not using Smart View modifies the year from 2020 to 2023 in the saved sheet. When you open the saved sheet in Smart View and refresh it, the sheet is refreshed with the data values of 2023, instead of reverting back to 2020.

The Refresh Saved Sheet as is (Ad Hoc Standard Mode) check box is present in the Smart View Options dialog, in the Advanced tab under the Compatibility section. It is selected by default. So the updates in your saved sheets will be retained on refresh.



Note:

When the **Refresh Saved Sheet as is (Ad Hoc Standard Mode)** check box is selected, sheets with very large ad hoc grids may sometimes display performance issues or slowness during refresh. To improve performance of such large grids, deselect the **Refresh Saved Sheet as is (Ad Hoc Standard Mode)** check box.

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

- Refreshing Ad Hoc Grids in Saved Worksheets
- Advanced Options

Retain Numeric Comments on Refresh

You can now retain any numeric comments entered in worksheets with Standard mode ad hoc grids while refreshing the worksheets in Oracle Smart View for Office. This also applies to worksheets having multiple ad hoc grids.

Earlier, if you entered any numbers outside an ad hoc grid, such a numeric comment would get lost upon refreshing or submitting the sheet. Now, numeric comments are saved and processed just like text comments in Smart View. The workaround of adding equal to sign (=) or single quotes (') before numbers in a comment is no longer required.

For more information, see Adding Cell Comments in EPM Cloud and Oracle Hyperion Planning in the *Oracle Smart View for Office User's Guide*.

Register Unregistered DLLs Using Health Check

You can now identify and register unregistered DLLs using the Health Check dialog.

In the **Health Check** dialog, you can verify if the Dynamic Link Library files (DLLs) required for various Smart View operations have been correctly registered or not after installing Oracle Smart View for Office. This ability was first introduced in release 24.100.

Starting release 24.200, you get the option to register the DLLs that remain unregistered during installation. After installing Smart View, it is a good practice to open the **Health Check** dialog to verify the registration status of the DLLs to ensure that the functionalities they manage work properly. The **Health Check** dialog displays the status of **BIPlusConnector.dll**, **Profiler.dll**, and **HsSpread.dll** in the **Details** column.

- If a DLL is registered correctly, the status appears as "Registered". For example, 24.200 / Registered.
- If a DLL is not registered correctly, the status appears as "Not Registered". In such cases, you can select the Register option from the drop-down list in the Fix/
 Update/Help Link column and click Update Settings to initiate the registration.



Note:

In the rare scenario that a DLL remains unregistered, even after using the **Register** option in the **Health Check** dialog, you must re-install Smart View using administrator privileges, that is using the "Run as administrator" option.

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

View Network Traffic Details in Real Time with Smart View's New Trace Traffic Tool

Oracle Smart View for Office's new built-in **Trace Traffic** tool helps users to view and capture network traffic details specific to Smart View in real time, and improves Oracle Support's ability to debug issues.

On the Smart View ribbon, a new menu item called **Trace Traffic** is introduced in the **Diagnostics** section. Clicking this menu item launches the **Network Traffic Trace** dialog, in which users can view network traffic details comprised of request and response logs in real time. To view traffic details, select **Smart View Traffic** from the **Capture** list, and then click **Start Capturing**. Once done, click **Stop Capturing**. These logs are saved with Smart View Diagnostics and can be shared with Oracle Support, who can then import the logs in the **Trace Traffic** tool for further diagnostics.

Note:

The **Diagnostics** group actions appear on the Smart View ribbon when you enable the **Show Diagnostics Group on Smart View Ribbon** option in the **Options** dialog, **Advanced** tab.

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

- Using the Trace Traffic Tool
- Using the Smart View Diagnostics Tools

Submit Data when Flex Forms Contain Invalid Members

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

In flex forms, you can now submit data even when there are invalid members on the sheet by using the **Submit Data Without Refresh** action on the provider ribbon.

To use the **Submit Data Without Refresh** option on flex forms containing invalid members, the Service Administrator or form designer must select the **Show invalid members for flex form** option during form design, as described in **Enabling the Invalid Member Option** in *Oracle Smart View for Office User's Guide*.



To submit data on a flex form containing invalid members, from the provider ribbon (for example, the Planning ribbon), select **Submit Data**, then **Submit Data Without Refresh**.

Note:

The **Submit Data** action will appear grayed out or disabled on the ribbon. But you can select the down arrow next to **Submit Data** to view the dropdown menu and see that the **Submit Data Without Refresh** option is enabled.

Support for using **Submit Data Without Refresh** to submit data on a flex form containing invalid members requires, at a minimum, Oracle Smart View for Office 24.200 and Oracle Fusion Cloud Enterprise Performance Management 24.10.

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

- Submitting Data when Flex Forms Contain Invalid Members
- · Retaining Invalid Members on Flex Forms

Display Design-Time Formatting in Forms 2.0

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

In Oracle Smart View for Office, you can display formatting defined in the form when working with Forms 2.0.

Note:

This feature requires Smart View 24.200+, EPM Cloud 24.11+, and Forms 2.0.

Administrators can add formatting rules to forms at design time. This is referred to as design-time formatting.

Format rules are defined by Administrators on the **Layout** tab of the Form Designer. Administrators can add Groovy rules, data validation rules, and formatting (formatonly) rules to the form. They can add format rules at the grid, row, row metadata cell, column, column metadata cell, or cell level.

Smart View users can apply the formatting rules to forms at runtime using the **Apply** options in the provider ribbon (for example, in the Planning ribbon). These options control how formatting rules are displayed on the form:

Cell Styles—Applies cell styles defined in Smart View, data validation rules, and Groovy rules. No format-only rules or Excel custom formatting are applied.



- Custom Styles—Applies formatting rules that were defined in the Format/ Validation Rule Builder at design-time, and any Excel custom formatting that was added in Smart View. Cell styles, Groovy rule formatting, and data validation rule formatting are not applied.
- Custom and Cell Styles—Applies Groovy rules, design-time formatting rules (data validation and format-only), all cell styles, and custom Excel formatting to the form.

It's possible to have multiple rules specified in the same location on a form which could impact how formatting is displayed. For example, a form could include a Groovy rule, a data validation rule, and custom Excel formatting all at the same location. Therefore, there's an order of precedence for displaying rules in forms.

For more information, see Working with Design-time Formatting in Forms 2.0 in the *Oracle Smart View for Office User's Guide*.

To view how design-time formatting rules are defined and the effect of the **Apply** option on the form, see the "Format Rule Scenarios" topic in the administration guide of your business process. For example, in *Administering Planning*, see Format Rule Scenarios.

Administrators and form designers: For information on setting up design-time formatting in forms:

- Administering and Working with Enterprise Profitability and Cost Management, Working with Data in Forms chapter, Creating and Updating Format Rules in Forms
- Administering Financial Consolidation and Close, Managing Forms chapter, Creating and Updating Format Rules in Forms
- Administering FreeForm, Managing Data Validation and Format Rules in Forms chapter, Creating and Updating Format Rules in Forms
- Administering Planning, Managing Data Validation and Format Rules in Forms chapter, Creating and Updating Format Rules in Forms
- Administering Tax Reporting, Managing Forms chapter, Creating and Updating Format Rules in Forms

Import Reports Containing Relational Tables in Smart View

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

You can now import formatted reports containing relational tables from Narrative Reporting and Reports in Oracle Smart View for Office.

To import a report with relational table, in the Smart View Home panel, navigate to the **Reports** folder. Then, select the required report and click **Import Formatted Report**. The report opens and displays the formatted relational tables. You can click **Refresh Report** in the Smart View ribbon to get the latest data, if required. However, the options of **Edit POV**, **Edit Prompts**, and **Analyze** remain disabled for reports with relational tables and will be made available in a future release.



Similarly, in Books, you can import a book that contains a report with a relational table in Smart View. However, the option of **Edit POV** is disabled for such reports.

Note:

You need the Narrative Reporting extension 24.10 or later and EPM Books extension 24.11 or later to use this feature in Smart View.

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

- Importing or Inserting, and Working with Fully Formatted Reports
- Importing Books into Smart View

Use Right-Click Context Menu in Ad Hoc Grids

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

You can now access contextual cell operations in ad hoc grids by right-clicking on member or data cells in the grid in Oracle Smart View for Office.

Earlier, the right-click context menu, also known as the Action menu, was available only in forms. Now, it can be enabled for ad hoc grids also. Using the right-click context menu, you can run business rules and perform cell-specific operations in ad hoc grids. It offers users is a convenient way to access frequently used commands within the context of the selected cell in ad hoc grids

To access the context menu, select a member or data cell in the ad hoc grid, right-click on it, and click the **Smart View** menu. The context menu commands are listed towards the end below the default menu.

The commands available in the context menu can vary depending on the selected member or data cell and are determined by Service Administrators and form designers. To enable a context menu for ad hoc grid, the Service Administrator navigates to the **Action Menus** page and selects the **Enable for Ad Hoc** check box for the specific Action menu and then selects the cubes for which the right-click context menu needs to be enabled. For more information on enabling the right-click context menu, see Administering Action Menus in *Oracle Hyperion Planning Administrator's Guide*.

For more information on using the right-click context menu in Smart View, see Right-Click Context Menu in Oracle Smart View for Office User's Guide.

Invalid Members and Comments Retained in Ad Hoc Grids After Refresh



In ad hoc grids, you can now retain invalid members after refresh when the Service Administrator enables the new **Keep Invalid Members/Comments** option in the application settings of your business process.

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

When the **Keep Invalid Members/Comments** option is enabled, you can detect:

- Unknown or invalid members on a grid
- Text typed outside the grid; for example, your own notes

Additionally, you can set a cell style for comments in Smart View that allows you to quickly and easily spot comment cells, including invalid or unknown members in the grid or pertinent notes you may have made on a sheet outside of the grid.

This feature allows you to quickly identify invalid members and comments in an ad hoc grid without losing your work during a refresh.



Tip:

- In Smart View, invalid members are considered comments. Use Cell Styles to set a distinct style for comments to quickly note invalid members and comments on an ad hoc sheet.
- In multi-dimension rows and columns, changing the member in the first column in the first row dimension or any of the rows in the first member column of the grid will result in an error. Changes to any other member cells will work as expected.

To work with invalid members in ad hoc grids, see these topics in the *Oracle Smart View for Office User's Guide:*

- Retaining Invalid Members and Comments After Refresh
- Cell Styles

Service Administrators: For information on setting the **Keep Invalid Members/ Comments** option in your business process:

- Application Settings in Administering and Working with Enterprise Profitability and Cost Management
- Specifying Application Settings in Administering Financial Consolidation and Close
- What Application and System Settings Can I Specify? in Administering FreeForm
- What Application and System Settings Can I Specify? in Administering Planning
- Specifying Application Settings in Administering Tax Reporting

View Prompts before POV while Importing or Inserting Reports

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

Starting Oracle Smart View for Office release 24.210, while importing or inserting reports from Oracle Fusion Cloud Enterprise Performance Management or Narrative Reporting, you can view and select prompts before setting the POV. This is to ensure consistency with the web application experience.

If the report contains prompts, you can view them in the **Select Prompts** dialog, categorized under prompt labels for clear differentiation. You can choose to use the default prompts by clicking **OK** in the **Select Prompts** dialog; or, you can change the prompts as described in and then click **OK**

Earlier, if **Preview POV** is enabled for reports, the **Select POV** dialog would appear first while importing or inserting reports. Now, the **Select Prompts** appears before the **Select POV** dialog while importing or inserting reports.

For more information, see Importing or Inserting, and Working with Fully Formatted Reports in *Oracle Smart View for Office User's Guide*.

Admin Extension 24.10 Update

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

An updated Admin Extension for Oracle Smart View for Office is available to download and install. This update contains additional debugging information useful for Smart View 's new Trace Traffic tool, described in View Network Traffic Details in Real Time with Smart View's New Trace Traffic Tool.

The Admin Extension allows Service Administrators to quickly import and edit dimension and member metadata directly in Smart View. The Admin Extension is also referred to as the Smart View Add-on for Administrator or the Planning Admin Extension.

You can update the Admin Extension in either of these ways:

- From the business process Downloads page, download the Admin Extension SVEXT file available under Planning Extensions, and then double-click the SVEXT file to install it.
- From the Smart View Options dialog, Extensions tab, click Check for Updates, New Installs, and Uninstalls, then follow the prompts to download and install the Admin Extension.

Fore more information, see

- Using Smart View to Import and Edit Application Metadata in Administering Planning
- Working with Oracle Smart View for Office:
 - Installing Extensions
 - Using the Trace Traffic Tool



EPM Books Features and Updates

Related Topics

- EPM Books 25.02 Extension Update
- Respond to Prompts While Importing Books
- EPM Books 24.11 Extension Update

EPM Books 25.02 Extension Update

An updated EPM Books 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 improvements and defect fixes in the EPM Books extension:

- 1. From within Smart View, 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

Respond to Prompts While Importing Books

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

Book users can now respond to prompts when importing a book in Oracle Smart View for Office.

Previously in books, any reports with prompts within the book needed to have the prompt selection defined by the book designer; prompts were not answerable by book users.

In this release, book users can now respond to prompts when executing a book, as well as have duplicate prompts combined to a single prompt. Designers can still define prompt selections, if needed, for specific prompts if the selection needs to be hardcoded and not selectable by the book user.

In Smart View, using the 24.11 Books Extension, when importing a book and responding to prompts in the **Prompts** dialog, you can either use:

- Full Mode—Displays all prompts in reports and books inserted separately.
- Compact Mode—Consolidates duplicate prompts (same dimension, prompt label, choice list, default selection, and "Allow Multiple Selections" setting for the same data source) across reports.

The same modes are available when previewing a book in the web business process.



You respond to prompts by selecting members from a predefined choice list, if one is defined for the prompt. If no choice list is defined, then the **Member Selector** is displayed. After making selections for each prompt, click **OK**. If you are prompted for the POV, complete those selections, and then a job to import the book is submitted and you can download the book once the job status is complete.

After importing and downloading the book, you may edit the prompts using the **Edit Prompts** button in the EPM Books ribbon.

For more information, see:

- Designing with Reports for Oracle Enterprise Performance Management Cloud
 - Defining Report Prompt Selections
 - Book Prompt Examples
- Installing the EPM Books Extension
 - Responding to and Editing Prompts
 - Books
- Responding to Book Prompts in Working with Reports

EPM Books 24.11 Extension Update

An updated EPM Books 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 prompts when importing books in Smart View, described in Respond to Prompts While Importing Books.

Narrative Reporting Features and Updates

Related Topics

- Narrative Reporting 25.03 Extension Update
- Shared Variable Lists
- Narrative Reporting 24.10 Extension Update
- Highlight All Variables in a Doclet

Narrative Reporting 25.03 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, Shared Variable Lists.

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

For installation information, see:

- Downloading and Installing Clients in Getting Started Guide for Administrators
- Downloading and Installing Clients in Getting Started Guide for Users



 Installing the Narrative Reporting Extension in Oracle Smart View for Office User's Guide

Shared Variable Lists

Shared variable lists serve as a centralized storage for commonly used static variables across multiple report packages. These shared variables are designed for common text and details that are seldom updated, such as company, division, reporting periods, years, and program names.

When creating a new variable list, you can define the name and description of the variable and set its value centrally using *value sets*. The value set allows the variable value to change over time. Value Set 1 is the default option. You can select a value set other than the default, and you can add, reorder, or delete additional value sets as needed.

Report packages can connect to multiple shared variable lists. The report package owner links to the variable list and chooses the value sets and the variables within the list to use in the report package.

Authors use Oracle Smart View for Office to insert shared variables into doclets in report packages, in the same way they insert static or reference variables. Viewing and working with shared variables in Smart View requires the 25.03 version of the Narrating Reporting extension, as described in Narrative Reporting 25.03 Extension Update.

With the new shared variables functionality, you can create, maintain, and delete shared variables collectively within a common area, and allow report packages to easily utilize these static variables.

For more information, see:

- Creating and Managing Report Packages:
 - Learning About Shared Variables
 - Adding Shared Variables to a Report Package
 - Refreshing Shared Variables
- Working with Variables in Working with Oracle Smart View for Office

Narrative Reporting 24.10 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 the Narrative Reporting feature, Highlight All Variables in a Doclet.

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

Highlight All Variables in a Doclet



In Narrative Reporting, you can now quickly view all instances of all variables in a doclet using the new **Highlight All** action on the **Options** menu in the **Variables** panel.

To use **Highlight All**, open a doclet and, optionally, check it out. You don't need to check out the doclet in order to highlight all variables.

From the drop-down menu in the Report Center, select **Variables**. Then select **Highlight All** from the **Options** drop-down menu. (The **Options** menu is accessed from the green gear above the Search box in the Variables panel.) Once selected, all variables in the active doclet are highlighted.

Use the **Unhighlight All** action on the **Options** menu to remove highlighting from all variables within the doclet.

To remove the highlighting from an individual variable when all variables are highlighted, you may select a variable from the list in the Variables panel and, from the **More Actions** menu for the individual variable, select **Unhighlight**.

Keep in mind the following when working with the highlighting:

- Variables within content controls or text boxes will not be highlighted whether
 using the Highlight All action or the Highlight action on the individual variable.
- All highlighting is cleared upon performing an Upload or Upload and Check In.

The new **Highlight All** and **Unhighlight All** actions provide you an easy way to view and locate all variables used in a doclet.

This feature requires the Narrative Reporting extension 24.10 or later. To install the extension, see Narrative Reporting 24.10 Extension Update.

For more information, see Highlighting Variables 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
- Extensions Supporting Only Microsoft Edge-based WebView2
- Smart View and Virtualized Environments
- Mobile Device Support

Smart View Version Support

Oracle supports and certifies the current release and one release prior (24.200 and 24.100) of Oracle Smart View for Office against current products on Premier Support.

Microsoft Windows Operating System and .NET Support

Oracle Smart View for Office 24.200 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.



Note:

Excel 2016 users: Ensure that you have installed the update described in Issue Loading Smart View XLA File After Excel 2016 November 12, 2024 Update.

Issue Loading Smart View XLA File After Excel 2016 November 12, 2024 Update

After installing the November 12, 2024 Microsoft Office update for Excel 2016, Excel was not able to locate the Smart View HsTbar.xla file upon startup. The issue is described in Excel 2016 stopped loading .xlam Excel Addins after security update from 12-nov-2024.

This issue is fixed by Microsoft in November 19, 2024, update for Excel 2016 (KB4484305). If you are using Excel 2016, Oracle advises that you download and install this fix.

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 Oracle Fusion Cloud Enterprise Performance Management 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



Some Office 365 users may face issues viewing drop-down list values in Smart Lists, member drop-down menus, in-cell POVs, and other drop-down lists. For example, on clicking any drop-down list in a cell, only an ellipses (...) may be displayed instead of the actual drop-down values. Users will need to upgrade to Smart View 22.200 or later in order to see the drop-down list values properly in cells.

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 Fusion Cloud Enterprise Performance Management 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 Cloud EPM 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 Cloud EPM 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.

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:

- Smart View began supporting WebView2 in release 23.210. For full support for WebView2, the latest Smart View version is recommended.
- WebView2 is supported only on Microsoft Windows 10 and 11.
- Although WebView2 is supported only on Windows 10 and 11, there may be instances where you are working with Smart View on a Windows Server version, such as Windows Server 2022, with WebView2 installed and enabled. In these cases, after initial login to an Office application, such as Excel, if you attempt to use Smart View in another Office application, you will be required to log in again. For example, if you are copying and pasting data points from Excel to Word, you will be required to log in to Excel, and then log in again to Word. This is due to Office applications not sharing the WebView2 data folder. Any functionality that relies on the shared data folder will not work as expected. The result is that users will need to log in and disconnect independently for each Office application on Windows Server.
- In the Health Check dialog in Smart View, the WebView2 Runtime option is set to Enable for All by default.
- For two-factor authentication login scenarios, in the Health Check dialog, the WebView2 Runtime option must be set to Enable for UI or Enable for All.

Once WebView2 is installed on Smart View client machines, users can enable or disable 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 or disable 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 (the default setting):
 <disableWebView2>0</disableWebView2>

<useWebView2forNetworking>1</useWebView2forNetworking>



Enable for UI:

<disableWebView2>0</disableWebView2>

<useWebView2forNetworking>0</useWebView2forNetworking</pre>

Disable:

<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.

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.

Extensions Supporting Only Microsoft Edge-based WebView2

This topic applies to the following extensions that work with Oracle Smart View for Office:

- Task Manager
- Supplemental Data
- Enterprise Journals
- Strategic Modeling

In Smart View 24.100 and earlier, these extensions supported the Microsoft Internet Explorer browser emulation mode.

Starting in Smart View 24.200, these extensions support only Microsoft Edge-based WebView2.

This means that you will need to install Smart View 24.200 or later in order to work with these extensions the next time they are updated after 24.09.

Oracle advises that you do not update these extensions until you have installed Smart View 24.200 and are working in the supported EPM Cloud environments.

See Table 1 for recommendations on upgrading Smart View, your EPM Cloud environments, and associated extensions.



Table 1-1 Smart View and Extension Compatibility

Smart View Version	Expected Behavior	Oracle Recommendation
23.100 23.200	WebView2 disabled by default	Stay on Smart View 23.100 or 23.200 with EPM 24.06 extensions
24.100	 WebView2 Runtime is enabled by default Enumeration of Models and Rollups is not supported, even when WebView2 Runtime is disabled Task Manager, Supplemental Data, and Enterprise Journals extensions are supported only when, in the Health Check dialog in Smart View, the Browser Emulation Setting = 11001. Strategic Modeling version 24.07+ supports enumeration of Models when WebView2 Runtime is disabled. 	 Upgrade Smart View to 24.100 after the EPM Cloud 24.07 release. In Smart View 24.100, WebView2 Runtime is enabled by default and should be manually disabled for the enumeration of Models work. WebView2 Runtime should be disabled or set to Enable for UI to support the pre-24.09 extensions of Task Manager, Supplemental Data, and Enterprise Journals.



Table 1-1 (Cont.) Smart View and Extension Compatibility

Smart View Version	Expected Behavior	Oracle Recommendation
24.200	 Defect fixes in Smart View and Strategic Modeling to support enumeration of Models with WebView2 Runtime enabled. Strategic Modeling version 24.10 to sync up with Smart View 24.200. Defect fixes in Smart View and the extensions of Task Manager, Supplemental Data, and Enterprise Journals to support working when WebView2 Runtime is enabled. Task Manager, Supplemental Data, and Enterprise Journals version 24.11 to be synced up with Smart View 24.200 version. 	 Upgrade to Smart View 24.200 Upgrade to EPM Cloud 24.11+ Upgrade to extensions later than 24.09

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.



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 24.200 from the following releases:

Table 1-2 Supported Paths to this Release

Release Upgrade Path From	То
24.100	24.200
23.200, 23.210	24.200

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
- Cloud EPM
- Essbase
- Narrative Reporting



General

 36081385 – When working with saved workbooks containing dimension sheets, you can now perform a Refresh and retain any expanded dimensions by selecting the Refresh Saved Sheet as is (Ad Hoc Standard Mode) in the Options dialog, Advanced tab.

For more information, see Refresh Data as is in Ad Hoc Grids in Saved Worksheets.

• 36135269, 36517474 – Saved dimension worksheets can now be properly refreshed when you enable the new option, **Refresh Saved Sheet as is (Ad Hoc Standard Mode)**, available in the Smart View **Options** dialog, **Advanced** tab.

For more information on this feature, see Refresh Data as is in Ad Hoc Grids in Saved Worksheets.

- 36511655 When launching Health Check, a command (CMD) window is no longer flashing or blinking while performing DLL registrations. The registration operations now take place in the background.
- 36526814 When the **Webview2 Runtime** option in **Health Check** is set to **Enabled for All**, Japanese alias characters now display correctly.
- 36643029 When multiple Excel workbooks are opened, and the user switches from one workbook to another, the Smart View panel now displays the correct content for the selected workbook.
- 36645042 Oracle Smart View for Office no longer fails intermittently when WebView2 is enabled.
- 36690935 When working with Reports, the Smart View Member Selection dialog uses the latest prompt label name.
- 36698821 All characters in a member alias are now retrieved correctly.
- 36724658 The list of changes for a selected cell or cell range is now correctly displayed in the **Change History** dialog in Smart View.

Cloud EPM



Note:

Unless otherwise noted, the fixed defects described in this topic apply to these Oracle Fusion Cloud Enterprise Performance Management business processes:

- Enterprise Profitability and Cost Management
- Financial Consolidation and Close
- FreeForm
- Planning
- Planning Modules
- Tax Reporting

These defects are fixed in this release:

- 35431353 Users should experience improved performance in sheets containing a large number of HsGetValue functions and attribute members.
 - This fix requires Cloud EPM 25.02+.
- 36334571 Numeric comments entered in worksheets with Standard mode ad hoc grids are now retained while refreshing the worksheets in Oracle Smart View for Office. This also applies to worksheets having multiple ad hoc grids. For more information, see Retain Numeric Comments on Refresh.
- 36387191 With the Preserve Formula on POV Change option enabled, when
 the POV is changed and a writable cell containing a formula becomes read-only
 after refreshing or submitting the form, the formula is removed to prevent display
 of incorrect data.
- 36455971, 36576593 When you connect to a Strategic Modeling-enabled application from Smart View, models are now displayed as expected when the **WebView2 Runtime** option in **Health Check** is set to **Enable for All**.
 - This fix requires Cloud EPM 24.07+ (36455971).
- 36743676 You can now correctly replace files in the Document Library that were
 downloaded from the web using the Save As action in the Library group on the
 Smart View ribbon.
- 36867786 All dimensions can be successfully zoomed in to Next Level, Bottom Level, and All Levels without encountering any exceptions.
- 36869290 In forms, cells containing the drop-down member selector now continue to display the member name in the cell once they're double-clicked or the drop-down member selector is activated.
- 37103479 When using the Insert Attributes action on the provider ad hoc ribbon, only indexed attributes are displayed in the Insert Attributes dialog. Non-indexed attributes are not included. If your application does not contain indexed attributes, then the Insert Attributes dialog is not displayed when you use the Insert Attributes action. For example, by default, Financial Consolidation and



Close applications contain only non-indexed attributes. Indexed attributes must be added to the application in order display the **Insert Attributes** dialog after clicking **Insert Attributes** on the provider ad hoc ribbon.

This fix required Cloud EPM 25.02+.

Essbase

- 36718572 You no longer need to disable WebView2 for silent authentication using HypLoginEssbaseCloudBasicAuth().
- 36842608 When connected to Essbase, the **Submit Without Refresh** action now submits the value of the cell when the cell has an Excel formula in it.

Narrative Reporting

36994811 – With Narrative Reporting 24.10+, the server-initiated refresh feature now respects the Smart View member option, Indentation: None.

Known Issues

Related Topics

- General
- Cloud EPM

General

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.

 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*.

- 35054608 No keyboard shortcuts are available to select in the Login dialog when WebView2 is enabled.
- 35116820 If the Health Check option, WebView2 Runtime, is set to Enable for UI or Enable for AII, 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.

- 35673178 If different EPM Cloud instances use different Identity Cloud Services (IDCS) instances, users will be prompted once per IDCS instance. For example, after logging into Narrative Reporting and launching a Planning-based Report, you may be prompted to log in again after clicking Analyze.
- 35728359 When performing drill-through to an Excel sheet, data value amounts on the sheet are shown in US format (with . as the decimal separator) and not in the regional format (with , as the decimal separator).
- 36401841 When WebView2 is enabled, selecting outside of a WebView2 dialog, such as the Sign In dialog, switches focus to the Excel application, making it unresponsive.

Cloud EPM



Unless otherwise noted, the known issues described in this topic apply to these Oracle Fusion Cloud Enterprise Performance Management business processes:

- Enterprise Profitability and Cost Management
- Financial Consolidation and Close
- FreeForm
- Planning
- Tax Reporting

These are the known issues related to Cloud EPM:

 33622708 – While saving a Microsoft Office file to the Cloud EPM 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.
- 35029572 When importing metadata for copied content, the POV metadata is not imported in PowerPoint 2019.
- 35480273 Comments outside the flex form grid area will not be adjusted to match grid layout changes.
- 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.
- 36180640 With WebView2 and the Save password dialog enabled, and using a shared connection to connect to an OCI data source, the Save password dialog is not displayed.

Workaround: Connect to the OCI data source a private connection and save the password when prompted. Disconnect or close Excel. Then, log in using the shared connection.

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 Cloud EPM and EPM System Product Documentation



Copying and Pasting Code Snippets from PDFs

Accessing Cloud EPM and EPM System Product Documentation

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

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

Cloud EPM

For Cloud EPM 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.

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 2023 R2
- Open XML SDK 2.18.0
- Zlib Data Compression Library 1.2.13



Oracle Smart View for Office Readme

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