

Smart View 26.200 Readme

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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 26.200

Related Topics

- [Enhancements to IPM Insights in Smart View](#)
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Enhancements to IPM Insights in Smart View

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

You can now view and insert Period Movement Variance insight in Oracle Smart View for Office. You can also view form-specific insights in context of an open form in Smart View.

In Smart View release 26.200, the following enhancements have been made to IPM Insights.

Support for Period Movement Variance Insight

Smart View now supports inserting Period Movement Variance insight. This insight detects significant variance between the current period and a benchmark period, that includes Year-on-Year, Custom Period, and Historical Average.

While inserting the insight in Smart View, the chart for the benchmark with the highest variance percentage is inserted by default. To view the charts for other available benchmarks, select the required benchmark from the Comparison list above the chart.

Inserting Period Movement Variance insight is supported in Microsoft Excel and Microsoft PowerPoint.

See [Inserting Insights in Smart View](#).

View Contextual Insights for Forms

In addition to viewing IPM insights at the application level, you can now view insights and insight summaries in context of an open form. This enhancement makes accessing insights easier, especially if you are tracking a particular form on a regular basis. You can view insights for the form as a whole or for a cell range in the form.

The **Insights AI** dialog box displays the number of insights categorized by insight type and priority, along with an AI summary of the insights, if Generative AI is enabled in the web application of the business process.

Viewing IPM insights for a form is available only in Microsoft Excel.

- To view all insights for a form, select and right-click a cell in the form grid, click **Smart View** in the right-click context menu, and then click **Insights AI**.
- To view insights for a data slice within a form, select and right-click a range of cells in the form grid, click **Smart View** in the right-click context menu, and then click **Insights AI**.

See [Viewing Insights for a Form](#).

For more information on working with IPM in Smart View, see [Using IPM Insights in Smart View](#) in *Oracle Smart View for Office User's Guide*.

Work on Reports in Microsoft PowerPoint using Smart View

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

You can insert and work on Reports from Oracle Fusion Cloud Enterprise Performance Management and Narrative Reporting in Microsoft PowerPoint using Oracle Smart View for Office. You can insert fully formatted reports in a PowerPoint presentation as a set of slides ready for presentation. Each report sheet is rendered on a separate slide.

You can insert reports in the following ways:

- **Insert Formatted Report:** The report objects, including logo, header, grid, and chart are inserted as images in the slide.
- **Insert Report as Table:** The report grid is inserted as an editable table which you can format in terms of color, font, font size, and so on as per your requirement. The rest of the objects are inserted as images.

After inserting a report, you can do the following:

- Change the report POV.
- Edit any prompts available in the report.
- View report properties.
- Analyze a report by directly opening it in Excel ad hoc from the slide.
- Refresh reports.

For more information, see [Working on Reports in PowerPoint](#) in *Oracle Smart View for Office User's Guide*.

Improvements in Member Selection Search in Smart View

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

You can now view the hierarchy of a selected member in the flat list of search results and have the option of searching members in the Member Selection dialog box using both the existing Find option and the new Search option.

In Oracle Smart View for Office release 26.200, the following improvements have been made in the Member Selection dialog box.

View Hierarchy of Members from the Flat List of Search Results

Previously, with responsive search powered by Suggest REST API, the flat list view of the search results did not give information about the hierarchy of a member.

Now, you can right-click a member in the flat list of search results, and select **View Hierarchy** to view the hierarchy of the selected member in the search results. The member list switches to the hierarchy view highlighting the selected member, where you can view the parents, siblings, and children of the member.

Use Preferred Option to Search Members

Previously, when responsive search powered by Suggest REST API was available for a business process, the **Find** option could not be used for searching members. Now, you can choose your preferred option for searching members, that is use the existing **Find** option or use the new **Search** option. The option you select is persisted as user preference the next time you open and work in the Member Selection dialog box.

The new **Search** option enables you to view and filter the member list incrementally as you type each letter, thus displaying search results in a flat list view faster. To use the new **Search** option, click the down arrow next to **Find**, and select **Search**. The **Search** displays a tick mark indicating that you can now use the responsive search.

The **Find** option enables you to find members by typing partial or full member name and then clicking **Find** to view the search results in a hierarchical view. You can use the **Find Next** and **Find Previous** options to navigate to the next matching search result. To use the **Find** option, ensure that the **Search** option is not selected, that is the tick mark does not appear on the **Search** option.

For more information, see [Searching for Members in the Member Selection Dialog Box](#) in *Oracle Smart View for Office User's Guide*.

Open a Flex Form as a Regular Form from Task List and Right-Click Context Menu

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

You now have the option of opening a flex form as a regular form from a task list and from the right-click context menu. Opening a flex form as a regular form helps you run Groovy rules better and take advantage of form-related operations.

If a task from a task list opens a flex form, the Action Panel of the task list now offers the **Open form** option along with the **Open flex form** option. Use the **Open form** option to open it as a regular form

Similarly, on a form if you have a right-click context menu which opens a flex form, this context menu now has a sub-menu with two options, **Open form** and **Open flex form**.

For more information, see [Working with Flex Forms in Smart View](#) in *Oracle Smart View for Office User's Guide*.

New Health Check Option: WebView2 Runtime Shared

A new option, **WebView2 Runtime Shared**, has been introduced in the **Health Check** dialog box.

In Windows, the **WebView** user data folder, located at %AppData%/Oracle/SmartView/WebView, is shared by default between Office applications. Oracle Smart View for Office uses this shared folder to track connections to data sources made from different Microsoft Office applications. In some cases, an organization may not want to allow the **WebView** folder to share the connection information between different Office apps. The **WebView2 Runtime Shared** option controls whether Smart View can share the **WebView** folder across Office applications.

This option has the following two states:

- **Enabled:** This is the default state. It indicates that the WebView folder is shared across Office applications, reducing the need to sign in again from different Office apps.
- **Disabled:** This state indicates that a separate folder is created for each Office application, and users are prompted to sign in separately when connecting from another Office application.

You can change the state in the **WebView2 Runtime Shared** option by selecting **Enable** or **Disable** in the **Fix/Update/Info** column.

Other ways to control the sharing of WebView folder is by configuring perAppFolders either in the Windows Registry or in the properties.xml file. However, the new **WebView2 Runtime Shared** option provides an easier way to check the current state and change it, if required.

For more information, see the following topics:

- [Performing a Health Check On Your System](#) in *Oracle Smart View for Office User's Guide*
- [Preventing Office Apps from Hanging on Connection by Disabling AppData WebView2 Folder Sharing](#) in *Oracle Smart View for Office Installation and Configuration Guide*

Installation Information

You can download this release from My Oracle Support (MOS): <https://support.oracle.com>

For information on Oracle Smart View for Office, including the link to downloading the latest Smart View release, see Knowledge Article [Smart View Support Matrix and Compatibility FAQ \(FAQ1580\)](#) (Doc ID [1923582.1](#)) on MOS. 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 [Available Patch Sets and Patch Set Updates for Oracle Smart View for Office \(KB169715\)](#) on MOS.

Complete installation instructions are in the *Oracle Smart View for Office Installation and Configuration Guide*. This guide is available in the [Smart View for Office](#) library on the Oracle Help Center:

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 Version Support

Oracle supports and certifies the current release and one release prior (26.200 and 26.100) of Oracle Smart View for Office against current products on Premier Support.

Microsoft Windows Operating System and .NET Support

Oracle Smart View for Office 26.200 is supported on Windows 11, and requires a supported version of Microsoft .NET Framework. Oracle recommends using .NET Framework 4.8 or higher.

Note

- Microsoft Windows 10 is no longer supported after October 14, 2025. For more information, see [Windows 10 support has ended on October 14, 2025](#).
- 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 2021 and 2024](#)
- [Microsoft Office 365](#)

Microsoft Office 2021 and 2024

Oracle Smart View for Office supports Microsoft Office 2021 and 2024.

Note

Office 2016 and Office 2019 users: Microsoft stopped supporting Office 2016 and Office 2019 as of October 14, 2025 as per their announcement in [End of support for Office 2016 and Office 2019](#). Oracle Smart View for Office 25.100 was the last Smart View release to support Office 2016 and Office 2019. Starting release 25.200 onwards, Oracle Smart View for Office no longer supports Office 2016 and Office 2019.

Microsoft Office 365

Smart View for Windows requires locally installed supported versions of Microsoft Office 365 applications, including Office 365 ProPlus installed using Click-to-Run. Smart View (Mac and Browser) provides an interface between Oracle's 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](#)).

Browser Support

Related Topics

- [Browser Add-ons](#)
- [Browser Version Support](#)
- [Microsoft Edge WebView2 Support](#)

Browser Add-ons

You can use Oracle Smart View for Office to interact with supported browser-based applications in Oracle 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>

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

Microsoft Edge WebView2 is required to be installed on each user's computer.

Certain authentication schemes require newer controls, such as WebView2, to process a complex login sequence. To use WebView2, ensure that Microsoft Edge WebView2 Runtime is installed and enabled on each Oracle Smart View for Office 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.
- Microsoft Edge WebView became a requirement starting in Smart View 25.200.
- WebView2 is supported only on Microsoft Windows 11.
- Although WebView2 is supported on Windows 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 distributing 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>
```

- **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.

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 26.200 from the following releases:

Table 1-1 Supported Paths to this Release

Release Upgrade Path From	To
25.200	26.200
26.100	26.200

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](#)
- [Reports](#)
- [Essbase](#)

General

These defects are fixed in this release:

- 39531604 – Smart View core features, including member selection workflows, no longer depend on Windows VBScript components that may be disabled or unavailable.
- 39597459, 39473648 – The Smart View installer can now complete installation and uninstallation when Windows VBScript is disabled or unavailable.
- 38612312 – The HypDisconnectAll VBA function no longer causes Excel to crash after recent Microsoft Office updates.
- 39163160 – Smart View formula refresh now handles provider timeout responses without returning mismatched response values for HsGetValue.
- 39766679 – Smart View now handles inactive-session responses properly, lets users sign in again, and avoids showing a DTD-related error during refresh or reconnect.

Cloud EPM

Note

Unless otherwise noted, the fixed defects described in this topic apply to the Oracle Fusion Cloud Enterprise Performance Management business processes of Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, and Tax Reporting.

These defects are fixed in this release:

- 39033684 – Smart View forms now preserve user-entered time-period values correctly when proportional spreading rolls up to locked parent members.
- 39270507 – Smart View ribbon no longer disappears from Excel after users connect, refresh, disconnect, and reopen Excel.
- 40108485 – When using Suggest REST API for member search, right-clicking a member in search result flat list and selecting the new View Hierarchy option now provides a hierarchical view for the member. See [Improvements in Member Selection Search in Smart View](#).
- 39979330 – When connected to two or more data providers and performing ad hoc analysis in each data provider, re-authentication after the initial authentication is no longer required every time an ad hoc grid is refreshed against a different data provider.

Reports

These defects are fixed in this release:

- 39751489 – In Smart View, the Edit POV dialog box can now be resized so that long member names and aliases are easier to view and select.
- 39962186 – Refreshing imported formatted reports after editing POV now refreshes existing worksheets, preserves worksheet mappings for renamed sheets, prevents breaking of formula, and avoids creating duplicate report sheets.
- 39812958 – Opening report package Word doclets with review comments using the Open in Smart View option no longer causes Microsoft Word to crash.
- 39830533 – Report Prompts in Smart View now open full member selection when only a default prompt selection is available.

Essbase

These defects are fixed in this release:

- 39784097 – The HypGetSubstitutionVariable VBA function used in Essbase now returns substitution variables correctly
- 39778299 – Smart View now shuts down Excel more cleanly after using extensions, and prevents cases where Excel remains running and the Smart View ribbon disappears on restart.

Known Issues

Related Topics

- [General](#)
- [Cloud EPM](#)
- [Narrative Reporting](#)

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 be 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*.

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

Workaround: First connect to Narrative Reporting in Smart View before running the **Check for Updates, New Installs, and Uninstalls**. Then in the **Health Check** dialog box, set the **WebView2 Runtime** option to **Enable for All**. 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 box.

- 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.

Workaround: Select the Excel icon from the task bar and select the login dialog.

Cloud EPM

Note

Unless otherwise noted, the known issues described in this topic apply to the Oracle Fusion Cloud Enterprise Performance Management business processes of Enterprise Profitability and Cost Management, Financial Consolidation and Close, FreeForm, Planning, and Tax Reporting.

These are the known issues related to Cloud EPM:

- 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.
- 35480273 – Comments outside the flex form grid area will not be adjusted to match grid layout changes.
- 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.

Narrative Reporting

36721015 – In Word doclets, any alt text entered for an image is lost upon check-in and replaced with a code added by Narrative Reporting. Note that alt text is preserved in PowerPoint upon check-in.

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 1.3.2

Oracle Smart View for Office Readme

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