Oracle® Fusion Cloud EPM

Deploying and Administering Oracle Smart View for Office (Mac and Browser)

F17311-42

ORACLE®

Contents

6 Reusing a Previously-Saved Manifest File

7 Sideloading and Logging In

8 Deploying the Manifest File to Office 365 Users

9 Tips and Troubleshooting

Documentation Accessibility

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.

Documentation Feedback

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.

1
Creating and Running an EPM Center of Excellence

A best practice for EPM is to create a CoE (Center of Excellence).

An **EPM CoE** is a unified effort to ensure adoption and best practices. It drives transformation in business processes related to performance management and the use of technology-enabled solutions.

Cloud adoption can empower your organization to improve business agility and promote innovative solutions. An EPM CoE oversees your cloud initiative, and it can help protect and maintain your investment and promote effective use.

The EPM CoE team:

- Ensures cloud adoption, helping your organization get the most out of your Oracle Fusion Cloud EPM investment
- Serves as a steering committee for best practices
- Leads EPM-related change management initiatives and drives transformation

All customers can benefit from an EPM CoE, including customers who have already implemented EPM.

How Do I Get Started?

Click to get best practices, guidance, and strategies for your own EPM CoE: Introduction to EPM Center of Excellence.

Learn More

- Watch the Cloud Customer Connect webinar: Creating and Running a Center of Excellence (CoE) for Cloud EPM
- Watch the videos: Overview: EPM Center of Excellence and Creating a Center of Excellence.
- See the business benefits and value proposition of an EPM CoE in *Creating and Running an EPM Center of Excellence*.

2
Overview

This guide describes how to deploy and administer Oracle Smart View for Office (Mac and Browser). It is intended for Oracle Fusion Cloud Enterprise Performance Management and Oracle Essbase Service Administrators overseeing Smart View and those responsible for administering Microsoft Office 365.

The Smart View add-in for Mac and Browser allows Office 365 users to take advantage of Smart View functionality on the browser-based version of Excel 365 or on Excel 365 for Macs.

To use the Smart View add-in for Mac and Browser, you first create a *manifest file*. Smart View provides a utility to help you quickly create this manifest file.

You can *sideload* the manifest file to your Mac or browser and then run Smart View for testing purposes. After testing, you can then deploy the manifest file to your Office 365 users.

The procedures in this document will show you how to:

- Create a manifest file for the Smart View add-in for Excel 365 on a Mac and in a browser
- Sideload the add-in to a Mac or browser for initial development and testing
- Deploy the add-in to your Office 365 users using Microsoft's "Centralized Deployment" wizard

3
Prerequisites

Consider the following prerequisites before using Oracle Smart View for Office (Mac and Browser).

- Your Microsoft Office 365 license permits you to use either or both:
  - Excel 365 on a Mac
  - Excel 365 on Google Chrome

    Currently, Smart View (Mac and Browser) supports only the Chrome browser.

- You have administrator privileges on the environment to which you want to connect.

- Oracle Fusion Cloud Enterprise Performance Management: Your Cloud EPM environment is updated to release 19.02 or later.

> **Note:**
>
> Native mode for ad hoc operations: Oracle Smart View for Office (Mac and Browser) does not support Native mode for ad hoc operations in supported Cloud EPM applications. Native mode is being phased out in favor of Standard mode, which offers enhanced features and is recommended for all users.
>
> To utilize Smart View (Mac and Browser) effectively, Oracle advises you to configure your Cloud EPM applications to use the **Standard** mode option for the **Smart View Ad Hoc Behavior** setting. This ensures compatibility and access to the latest functionalities.

- Oracle Essbase:
  - Your Essbase environment (Essbase on Oracle Cloud Infrastructure via Marketplace) is of release 21.5.2.0.1 and later.
  - You have enabled the **Deploy Smart View Server** option when creating the Essbase stack, described in Create Stack in *Essbase Stack Deployment on Oracle Cloud Infrastructure*.

  > **Note:**
  >
  > Smart View can only be deployed on a fresh Essbase deployment. If you are upgrading from a previous release, you are not given the option to deploy Smart View (Mac and Browser).

- You have access to a test environment.
- You have Office 365 users provisioned in your organization.

4

Creating the Manifest File

Office 365 uses the Oracle Smart View for Office (Mac and Browser) manifest file to provide users with access to Smart View on a Mac or in a browser.

Related Topics

- About the Manifest File
  Office 365 uses the Oracle Smart View for Office (Mac and Browser) manifest file to provide users with access to Smart View on a Mac or in a browser.

- Creating and Saving the Manifest File
  Office 365 uses the Oracle Smart View for Office (Mac and Browser) manifest file to provide users with access to Smart View on a Mac or in a browser.

- Working with Multiple Login Domains
  If users access more than one application domain while working with Oracle Smart View for Office (Mac and Browser), then the Service Administrator must add all the required domain URLs to the manifest file.

- Changing the Smart View Ribbon Tab Name
  In the **Create Manifest File** page, the **Add-in Name** is the ribbon tab name that users will see in the Oracle Smart View for Office (Mac and Browser) interface and when downloading the Smart View add-in from Excel.

- Adding Commands to the Right-Click Menu
  The right-click menu is a convenient way to access frequently-used menu items within the context of the selected cell.

- Specifying Localized Versions of Smart View (Mac and Browser)
  Oracle Smart View for Office (Mac and Browser) supports localized versions of the user interface.

- Enabling Functions Support and Functions Builder
  You can enable support for functions and enable access to the Function Builder while working in Oracle Smart View for Office (Mac and Browser).

- Enabling Extensions in Smart View (Mac and Browser)
  You can enable extensions for users when creating the manifest file.

About the Manifest File

Office 365 uses the Oracle Smart View for Office (Mac and Browser) manifest file to provide users with access to Smart View on a Mac or in a browser.

The easy-to-use **Create Manifest File** page allows you to quickly begin testing and deploying Smart View (Mac and Browser).

In the **Create Manifest File** page, you can specify or enable the following information and features:

- Domain information—Important when your environment is set up with multiple login domains, described in Working with Multiple Login Domains

  In addition to the default login domain, two domain URLs are included to aid in application domain login verification. They are:

- `https://login.oci.oraclecloud.com`

- `https://consent.truste.com`
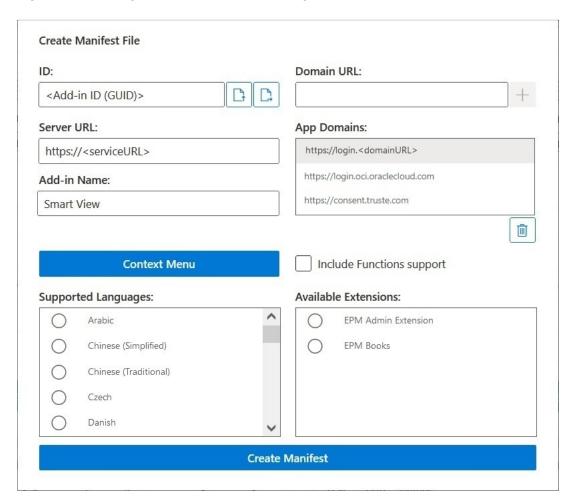
  Do not delete these default URLs.

- Smart View ribbon tab name—You can use the default name, Smart View, or customize the name to fit your user requirements

- Support for Smart View functions

- Smart View ribbon commands for the context menu

- Additional language support

- Support for available extensions

After specifying and enabling items in the **Create Manifest File** page, you save it, sideload it for testing purposes, and then deploy it to your users.

Figure 1 is an example of the **Create Manifest File** page.

Figure 4-1   Example CreateManifest.html Page

Creating and Saving the Manifest File

Office 365 uses the Oracle Smart View for Office (Mac and Browser) manifest file to provide users with access to Smart View on a Mac or in a browser.

To create a manifest file:

1. Create a folder on your local drive for storing manifest files.

2. Log in to your cloud environment; for example:

   - If you are an Oracle Fusion Cloud Enterprise Performance Management service administrator for Planning, log in to your Planning environment.

   - If you are an Oracle Essbase administrator, log in to your Essbase environment.

3. Once logged in, go to the **Create Manifest File** page, `CreateManifest.html`, by manually changing the business process URL as follows:

   For Cloud EPM environments:

   ```
   https://serviceURL/HyperionPlanning/CreateManifest.html
   ```
   For Essbase environments:

   ```
   https://serviceURL/essbase/sv/CreateManifest.html
   ```

   > ✎ **Note:**
   >
   > If your browser language is set to one of the 27 non-English languages supported by the Smart View user interface, then the **Create Manifest File** page is displayed in that localized language. See Specifying Localized Versions of Smart View (Mac and Browser) for more information.

   See Figure 1 in About the Manifest File for an example of the **Create Manifest File** page.
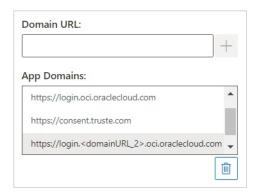
4. Enter the required URLs in **Domain URL**, and then click the **Add** button, ⊞.

   Add application login domain URLs in the following scenarios:

   - Your non-OCI environment uses more than one application login domain

     In this scenario, use the following format for the domain URLs:

     ```
     https://login.<domainURL>.oraclecloud.com
     ```

     In this example, these URLs appears in the **App Domains** list: the default login URL (<domainURL_default>) and verification URLs appear at the top of the list; the additional login URL (<domainURL_2> is added to end of the list:

- You're in an OCI environment using Oracle Identity Cloud Service (IDCS)

  The following is an example of a domain URL format in an OCI environment
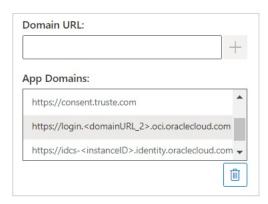
  ```
  https://login.<domainURL>.oci.oraclecloud.com
  ```

  The format of your URL may differ.

  You must also add an IDCS URL in the **Domain URL** field in the following format:

  ```
  https://idcs-<instanceID>.identity.oraclecloud.com
  ```

  In the following example, the visible portion of the **App Domains** list contains the following URLs: a certification URL (https://consent.truste.com) appears at the top of the visible list (not in view are the default login URL and the default https://login.oci.oraclecloud.com URL); an additional login URL (<domainURL_2>, and the IDCS URL (idcs-<instanceID>.identity.oraclecloud.com) are listed under the default https://consent.truste.com URL:

  The URLs are added to the **App Domains** list.

  By default, the domain URL from which you accessed the **Create Manifest File** page is already added to **App Domains**, along with two additional URLs related to application domain login verification, as described in About the Manifest File.

> **Note:**
>
> For more information on multiple login domains, see Working with Multiple Login Domains.

> **Tip:**
>
> For the correct domain URL syntax, log in to the appropriate cloud service, copy the URL, paste the URL into the **Domain URL** field, and then click **Add**.

You must add all login domains used in your environment. Any time a domain (URL) is accessed that is not defined within the manifest file after sideloading or deploying the Smart View add-in, Excel launches this URL in the browser and loading fails. This is an indication to add that domain to the manifest, regenerate the manifest file, and sideload or redeploy.

5. Customize your manifest file in the following ways to fit your requirements.

   • Rename the Smart View ribbon tab name, described in Changing the Smart View Ribbon Tab Name

   • Add commands to the right-click menu, described in Adding Commands to the Right-Click Menu

   • Select additional languages, described in Specifying Localized Versions of Smart View (Mac and Browser)

   • Enable support for functions, described in Enabling Functions Support and Functions Builder

   • Enable extensions in Smart View, described in Enabling Extensions in Smart View (Mac and Browser)

   Additionally, see these topics if you require:

   • Generate a unique ID for the manifest file for use in a multiple manifest scenario, described in Working with Multiple Manifest Files

   • Reuse an existing manifest file, described in Reusing a Previously-Saved Manifest File

6. Review and finalize your changes to the manifest, and then click **Create Manifest**.

   At the prompt, enter a name for the manifest file and choose a location to save it.

> **Note:**
>
> Do not include spaces in the manifest file name.

By default, the manifest file is saved to the location you've specified as the download location for your browser; typically, the `Downloads` folder.

7. Move the manifest file you just created from `Downloads` to the folder you created earlier for storing manifest files.

8. Continue with Sideloading and Logging In to test before deploying; then complete the deployment process with Deploying the Manifest File to Office 365 Users.

Working with Multiple Login Domains

If users access more than one application domain while working with Oracle Smart View for Office (Mac and Browser), then the Service Administrator must add all the required domain URLs to the manifest file.

In addition to information about the Smart View user interface for Excel on a Mac or in a browser (described in About the Manifest File), the manifest file also includes information about the application domains that users will access, using the **Domain URL** and **App Domains** fields:
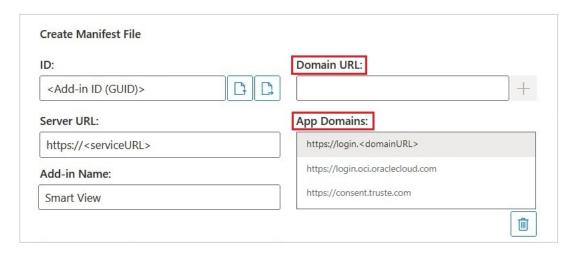
- **Domain URL**—Used to add login domain URLs when more than one login domain is configured. After adding, the additional login domains will be listed in **App Domains**.

- **App Domains**—Lists the default login domain URL, derived from the entry in **Server URL**. If your environment uses more than one login domain, lists the additional domains that you added in **Domain URL**.

  In addition to the default login domain, two domain URLs are included to aid in application domain login verification. They are:

  - `https://login.oci.oraclecloud.com`

  - `https://consent.truste.com`

Figure 1 highlights the portion of the **Create Manifest File** page that contains the **Domain URL** and **App Domains** fields.

Figure 4-2   Domain URL and App Domains Fields in Create Manifest File Page

The **Server URL** field displays the URL for the server you logged in to when you accessed the **Create Manifest File** page. This field is read-only. The example in Figure 1 shows generic URL syntax.

Enter additional application login URL information in the **Domain URL** field, as described in 4 in Creating and Saving the Manifest File.

If you're in an OCI environment using Oracle Identity Cloud Service (IDCS), add the IDCS URL as a domain URL. For example, you may add a URL in the following format:

`https://idcs-<instanceID>.identity.oraclecloud.com`

The format of your URL may differ.

> **Note:**
>
> If no domain URLs are listed under **App Domains**, then the browser session is launched with an unknown domain error and Smart View fails to sign in.

After adding, the additional application domain URLs and the IDCS URL (if applicable) appear in the **App Domains** field, as shown in the examples in Figure 2 and Figure 3.

Figure 4-3   App Domains Field Listing Additional Domain URLs
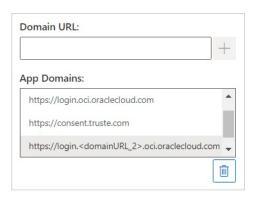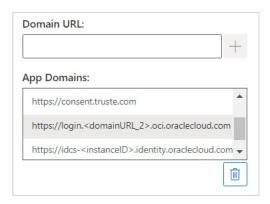
Figure 4-4   App Domains Field for OCI Environment Listing Additional Domain URL and IDCS URL

To obtain the Identity Domain URLs and the Oracle Cloud EPM URLs required for the manifest file, consult the Identity Domain Administrator or Service Administrator.

Domain Administrators and Identity Domain Administrators: Access identity domain information from the IAM interface in the Oracle Cloud Console.

Changing the Smart View Ribbon Tab Name

In the **Create Manifest File** page, the **Add-in Name** is the ribbon tab name that users will see in the Oracle Smart View for Office (Mac and Browser) interface and when downloading the Smart View add-in from Excel.

When creating the manifest file, you can change the name of the ribbon tab. This can be helpful when working with deployments for multiple business processes; for example, Planning and Tax Reporting. In such a case, you may specify ribbon names for each deployment, such as **Smart View Planning** for Planning and **Smart View Tax** for Tax Reporting. Then, when users launch Excel on the Mac or in the browser, they would see the ribbon tabs named **Smart View Planning** and **Smart View Consolidation**.

> **Note:**
>
> • The default name ribbon tab name is **Smart View**.
>
> • The name is limited to 24 characters.

To specify a ribbon tab name other than the default, in the **Add-in Name** field in the **Create Manifest File** page, enter the ribbon tab name that users will see for Smart View in the Office 365 application on the Mac or in a browser.

This is also the name that will appear when downloading the Oracle Smart View for Office add-in from Excel using the **Insert, Add-ins** command.

In the following example, in the **Add-in Name** field, **Planning** is appended to the default ribbon name, **Smart View**, so the ribbon name and add-in name will read **Smart View Planning**.

Add-in Name:

Smart View Planning

Adding Commands to the Right-Click Menu

The right-click menu is a convenient way to access frequently-used menu items within the context of the selected cell.

You can add and remove commands from right-click menu items by editing the manifest file and redeploying or sideloading again.

> **Note:**
>
> The **Context Menu** button and the selected menu items apply only to the right-click menu.
>
> **Cloud EPM only:** The options on the right-click context menu differ from the options available in the **Context Menu** button in the provider ribbon. In the **Context Menu** button in the provider ribbon, the available options to select from are determined by your Service Administrators and form designers, and can consist of business rules or any action menu items that are defined for currently-opened form.

Adding Commands
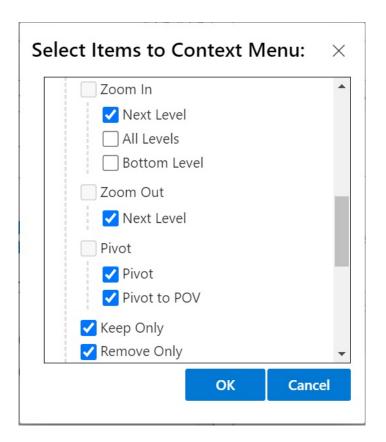
To add commands to the right-click menu:

1. In the **Create Manifest File** page, click the **Context Menu** button.

2. In the **Select Items to Context Menu** dialog, select the check boxes next to the menu items to add to the right-click menu.

   Select only the bottom-level command names. Group names are not selectable. After making selections, click the **OK** button.

   Selected items for the right-click menu appear in red italicized and underlined text in the **Select Items to Context Menu** dialog.

   In the following example, you can see that the **Next Level** command for both **Zoom In** and **Zoom Out** have been added to the right-click menu, along with **Pivot**, **Pivot to POV**, **Keep Only**, and **Remove Only**:

3. Click **OK** to close the dialog and return to the **Create Manifest File** page.

   Following is an example of the context menu that was configured in the previous step. Note that the menu option name is repeated in the context menu:

Figure 4-5   Right-click Context Menu Example

Removing Commands

To remove commands from the right-click menu:

1. In the **Create Manifest File** page, click the **Context Menu** button.

2. In the **Select Items to Context Menu** dialog, locate the item in the list (the check box next to the item should be checked), and then clear the check box.

3. Click **OK** to close the dialog and return to the **Create Manifest File** page.

Specifying Localized Versions of Smart View (Mac and Browser)

Oracle Smart View for Office (Mac and Browser) supports localized versions of the user interface.

Supported languages are: Arabic, Czech. Danish, German, Greek, English, Spanish, Finnish, French, French Canadian, Hebrew, Hungarian, Italian, Japanese, Korean, Dutch, Norwegian, Polish, Portuguese, Brazilian Portuguese, Romanian, Russian, Slovak, Swedish, Thai, Turkish, Simplified Chinese, Traditional Chinese.

The localized versions of Smart View (Mac and Browser) provide users with an improved non-English experience where they can switch to their desired language to work with the Smart View user interface, as required.
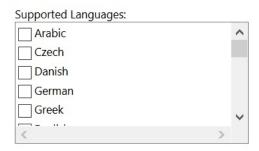
• Information for Administrators

• Information for Users

Information for Administrators

The manifest file creation page, CreateManifest.html, is also localized and may be used in your browser language, if set to one of the languages supported by Smart View.

To include localized versions of Smart View (Mac and Browser) in your deployment, in the Create Manifest File page, use the check boxes under **Supported Languages** to select up to 10 languages to include in your deployment:

> **Note:**
>
> • There is a limit of 10 languages allowed per manifest file. Selecting more than 10 languages in **Supported Languages** results in a warning message. If your users require more than 10 languages, then you must create another manifest file with the additional required languages and perform an additional centralized deployment. For more information, see Working with Multiple Manifest Files.
>
> • In the "Supported Languages" option:
>   - The limit of 10 languages applies even if you plan to only sideload a manifest file.
>   - English is always selected by default, even in non-English environments and locales.

Once deployed, all supported localized languages are available to be selected by Smart View users.

Information for Users

On the Mac, users change the locale of their Mac system to use a localized version of Smart View (Mac and Browser). On the Chrome browser, users change the language preference of Office 365. Users can change languages to any supported language at any time. For example, a user may change from English to French, and then later, change from French to Simplified Chinese. There is no limit on changing the interface language.

To use a localized version of Smart View (Mac and Browser):

• On a Mac, change the language version of your Mac system. See Change the language your Mac uses for instructions.

 When you change the language on your Mac system, the change is instant.

• On Windows 10, change the language display preference in the browser version of Office 365. See Change your display language and time zone in Microsoft 365 for Business for instructions.

When you change the language in Office 365 on Windows, allow at least 20 minutes for the change to take effect.

Enabling Functions Support and Functions Builder

You can enable support for functions and enable access to the Function Builder while working in Oracle Smart View for Office (Mac and Browser).

To enable support for functions and access to the Function Builder, select the **Include Functions support** check box in the **Create Manifest File** page when creating or editing the manifest file.

Following is an example of the **Include Functions support** check box.

✅ Include Functions support

With this check box selected, users can:

- Manually add or edit supported functions on a worksheet.
- Access the **Function Builder** interface to create functions using a wizard.

  After deployment, users can access the **Function Builder** from the Smart View ribbon. In the **Edit** group, select **Functions**, then **Build Function** to launch the **Function Builder**.

> **Note:**
>
> The **Include Functions support** check box is disabled by default. To work with functions in Smart View, you must select the **Include Functions support** check box when creating or editing the manifest file.

Enabling Extensions in Smart View (Mac and Browser)

You can enable extensions for users when creating the manifest file.

These extensions for Oracle Fusion Cloud Enterprise Performance Management are listed under **Available Extensions** section.

- EPM Admin Extension
- EPM Books

> **Note:**
>
> There are no available extensions for Oracle Essbase.

EPM Admin Extension

To use EPM Admin Extension functionality in Oracle Smart View for Office (Mac and Browser), select the **EPM Admin Extension** option.

The Admin Extension gives you access to dimension management and application management functionality. Oracle recommends that you deploy or side load a separate custom manifest file exclusively for Service Administrators with the **EPM Admin Extension** check box selected.

EPM Books

To use EPM Books functionality in Smart View, select the **EPM Books** check box.

In Cloud EPM, Books are a collection of one or more Reports, Books, and other documents, that you generate into a single PDF or Excel output. Using the EPM Books extension for Smart View (Mac and Browser), you can import Books in to Microsoft Excel and work with them by changing POV values and refreshing. You can also open and work with Books that were downloaded in Excel format from the web application.

5

Working with Multiple Manifest Files

You can deploy or sideload multiple manifest files.

Related Topics

- Using Multiple Manifests
  You may want to deploy or sideload multiple manifests for different purposes.

- Creating Files for Multiple Manifest Deployment or Sideloading
  You can create a manifest file for use in a multiple-manifest file scenario.

- Deploying or Sideloading Multiple Manifest Files
  You can deploy or sideload multiple manifest files.

- Guidelines for Working with Multiple Manifest Files
  Consider the following guidelines when working with multiple manifest files.

Using Multiple Manifests

You may want to deploy or sideload multiple manifests for different purposes.

For example:

- You may want to deploy a subset of Oracle Smart View for Office (Mac and Browser) functionality to your users while, at the same time, sideload a manifest containing new features that you plan to test and then deploy.

- Users may need to create multiple-grid sheets containing grids based on Planning and Financial Consolidation and Close data sources.

- Your users require the Smart View interface in more than 10 localized languages. Due a limit of 10 languages per manifest file, you must spread the languages across multiple manifest files.

You may deploy or sideload multiple manifests:

1. From the same cloud data source for the same business process

2. From the same cloud data source for different business processes

3. From different cloud data sources for the same business process

4. From different cloud data sources for the different business processes

Generally, deploying or sideloading multiple manifest files is as simple as repeating the deployment or sideloading procedures. However, if you plan to work with multiple manifests based on the same business process, described in numbers 1 and 3 above, an extra step required where you must redefine the <Id> element within the XML file in order to differentiate the manifests.

Creating Files for Multiple Manifest Deployment or Sideloading

You can create a manifest file for use in a multiple-manifest file scenario.

To create manifest files:

1. Log in to the applicable cloud business processes to create or edit the manifests you require for each business process.

> **Note:**
>
> When working with multiple manifest files, you may enable function support on only one of the multiple files that you plan to deploy or sideload. For example, if you plan to deploy three manifest files, the **Include Functions support** option may be enabled on only one of the three manifest files.

For instructions on creating a manifest file, see Creating and Saving the Manifest File.

If you would like to reuse a manifest file that you have already used in a multiple-manifest file scenario, see Reusing a Previously-Saved Manifest File.

2. In the **Add-in Name** field, provide a unique name for the Smart View ribbon for each manifest file that you create.

The **Add-in Name** is the ribbon name that users will see in the Oracle Smart View for Office (Mac and Browser) interface.

The **Add-in Name** is also the name that will appear when downloading the Smart View add-in from Excel using the **Insert**, **Add-ins** command

In the following example, **Planning** is appended to the default ribbon name, **Smart View**, so the ribbon name and add-in name will read **Smart View Planning**.

Add-in Name:

Smart View Planning

> **Note:**
>
> The name is limited to 24 characters.

Oracle recommends that you provide a unique name for each ribbon and add-in so that you and your users will know the purpose of each. For example, if you are creating manifests for a Planning data source and for a Tax Reporting data source, you might use the name **Smart View Planning** for the Planning source, and **Smart View Tax** for the Tax Reporting source.

3. Ensure that you have added all application login domain URLs, including an Oracle Identity Cloud Service (IDCS) URL if you're in an OCI environment using IDCS, as described in step 4 in Creating and Saving the Manifest File.

For additional information, see Working with Multiple Login Domains.

4. If you plan to create multiple manifests for the same business process, as described in numbers 1 and 3 in Using Multiple Manifests, continue to step 5.

If each manifest you plan to create is for a different business process, described in numbers 2 and 4 in Using Multiple Manifests, continue to step 6.

5. In the **Create Manifest File** page, click [icon] to generate a new GUID for the manifest file.

> ✎ **Note:**
>
> Do not manually edit GUID in the **ID** field. Always click the **Generate new unique GUID** button, , to generate a new GUID. Manual edits to this field may invalidate the manifest.

The new GUID for the manifest file is now displayed in the **ID** field.

Following is the **ID** field and its **Generate new unique ID for the add-in GUID** button, :

6. Continue with Deploying or Sideloading Multiple Manifest Files.

Deploying or Sideloading Multiple Manifest Files

You can deploy or sideload multiple manifest files.

To deploy or sideload multiple manifest files:

1. Complete the procedures in Creating Files for Multiple Manifest Deployment or Sideloading to prepare the manifest files you require for each business process.

2. Perform the deployment or sideloading procedures for each manifest file you have created.

   Alternatively, perform any combination of deployment and sideload you require. For example, you may perform a deployment and then a sideload; or a sideload and then a deployment.

   For more information, see these chapters:

   • Deploying the Manifest File to Office 365 Users

   • Sideloading and Logging In

Guidelines for Working with Multiple Manifest Files

Consider the following guidelines when working with multiple manifest files.

• Clearing the Mac or browser cache removes sideloaded add-ins, but does not remove centrally-deployed add-ins. Anytime you clear your cache on the Mac or in the browser on the Mac, you will need to sideload the add-in again. However, any add-in deployed via centralized deployment will automatically display, even after clearing the cache.

• When sideloading on the Mac, you will need to add the Smart View add-in each time you launch Excel 365.

• When opening a worksheet that already has data on it, including multiple-grid sheets, the worksheet metadata will cause the applicable ribbons to automatically load, without clearing the cache or re-sideloading.

- In the **Create Manifest File** page, do not manually edit the **ID** field. Always click the

  Generate new unique GUID button, [icon], to generate a new GUID. Manual edits to this field may invalidate the manifest.

6

Reusing a Previously-Saved Manifest File

When you reuse a manifest, you are reusing the add-in ID, along with several other elements that were defined in the original manifest. You will also need to edit or recreate other elements in order to match the original manifest.

To reuse an existing manifest file:

1. Log in to your business process environment; for example:

    -   If you are an Oracle Fusion Cloud Enterprise Performance Management service administrator for Planning, log in to your Planning environment.

    -   If you are an Oracle Essbase administrator, log in to your Essbase environment.

2. Once logged in, go to the **Create Manifest File** page, `CreateManifest.html`, by manually changing the business process URL as follows:

    For Cloud EPM environments:

    ```
    https://serviceURL/HyperionPlanning/CreateManifest.html
    ```
    For Essbase environments:

    ```
    https://serviceURL/essbase/sv/CreateManifest.html
    ```
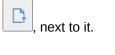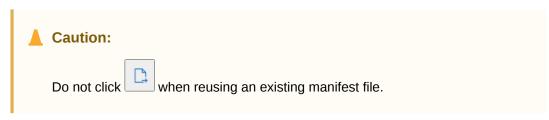
3. In the **Create Manifest File** page, click the **Select manifest file to reuse** button, , located next to the **ID** field, then select the manifest file that you want to reuse, and then click **Open**.

    The ID from the manifest file that you selected is now displayed in the **ID** field.

    The following shows the default **ID** field and the **Select manifest file to reuse** button, , next to it.

    > ⚠ **Caution:**
    >
    > Do not click when reusing an existing manifest file.

4. In the **Create Manifest File** page, these elements are repopulated with your original selections, which you can verify and edit as you require:

    -   **App Domains**

    -   **Add-in Name**

    -   **Include Functions support**

> **✎ Note:**
>
> The **Server URL** field is not editable.

5. **Important!** In the **Add-in Name** field, Oracle recommends that you use the same name you used in your original manifest file.

   For example, if you previously used `Smart View Planning` in the **Add-in Name** field, then ensure that `Smart View Planning` is entered in the **Add-in Name** field.

   Add-in Name:

   Smart View Planning

> **✎ Note:**
>
> The entry in the **Add-in Name** field is limited to 24 characters.

   The **Add-in Name** is the ribbon name that users will see in the Oracle Smart View for Office interface. The **Add-in Name** is also the name that will appear when downloading the Smart View add-in from Excel using the **Insert, Add-ins** command.

   If you plan to deploy multiple manifest files, Oracle recommends that you provide a unique name in the **Add-in Name** field for each manifest you plan to deploy. This way, you and your users will know each add-in and ribbon's purpose. For example, if you are creating manifests for a Planning data source and for a Tax Reporting data source, you might use the name **Smart View Planning** for the Planning source, and **Smart View Tax** for the Tax Reporting source. See Working with Multiple Manifest Files for more information.

6. If the **Include Functions support** check box was previously selected, then ensure that it is selected.

   See Enabling Functions Support and Functions Builder for more information.

7. Click **Context Menu** and verify that any right-click context menu items that you require are selected.

   See Adding Commands to the Right-Click Menu for more information.

8. In **Available Extensions**, verify that any extensions you require are selected.

   See Enabling Extensions in Smart View (Mac and Browser) for more information.

9. After making all updates, click the **Create Manifest** button.

10. Move the manifest file you just created to the folder where you store manifest files.

11. **Optional:** If you plan to reuse manifest files in a multiple-manifest file deployment, repeat the steps above for each manifest, customizing as required.

   Refer to Working with Multiple Manifest Files for information on deploying or sideloading multiple manifest files.

7

Sideloading and Logging In

Related Topics

- Mac: Sideloading on Excel 365 and Logging In
  Sideloading on the Mac is a way for you to test the Oracle Smart View for Office (Mac and Browser) add-in before deploying it to a wider audience.

- Chrome: Sideloading and Logging In
  Sideloading on a browser is a way for you to test the Oracle Smart View for Office (Mac and Browser) add-in before deploying it to a wider audience.

Mac: Sideloading on Excel 365 and Logging In

Sideloading on the Mac is a way for you to test the Oracle Smart View for Office (Mac and Browser) add-in before deploying it to a wider audience.

> ✎ **Note:**
>
> You will need perform the steps in Sideloading on Excel 365 on a Mac to add the Smart View add-in each time you launch Excel 365.

See:

- Sideloading on Excel 365 on a Mac
- Logging in to Smart View on Excel 365 on a Mac

Sideloading on Excel 365 on a Mac

For Excel 365 running on a Mac, you can use the manifest file you created in Creating and Saving the Manifest File to sideload the Smart View add-in.
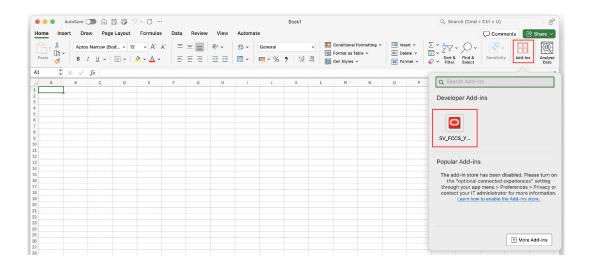
> ✎ **Note:**
>
> Oracle requires that you clear the Office cache before sideloading a manifest file. See Clearing the Office and Web Cache on a Mac for more information.

Use this procedure for your personal testing. To sideload the manifest file on Excel 365 on a Mac:

1. Copy the manifest file you saved in Creating and Saving the Manifest File to this location:

   `/Users/<user>/Library/Containers/com.microsoft.Excel/Data/Documents/wef`

   If the `wef` folder does NOT exist in this location, then create it.

2. Launch Excel 365.

3. Select the **Home** tab.

4. Click **Add-ins**, and under **Developer Add-ins**, select the Smart View add-in.

The Smart View ribbon tab should now appear in Excel.

> **Note:**
>
> When sideloading on the Mac, you will need to add the Smart View add-in each time you launch Excel 365.

5. Continue with Logging in to Smart View on Excel 365 on a Mac.

6. **Optional:** If you plan to sideload multiple manifest files, repeat the steps above for each manifest you want to sideload.

   Refer to Working with Multiple Manifest Files for information on sideloading multiple manifest files.

Logging in to Smart View on Excel 365 on a Mac

Once you've completed the steps in Sideloading on Excel 365 on a Mac and added the Smart View add-in to Excel 365, you can log in to your environment.

To log in to your environment:

1. In the Smart View ribbon, click **Home**.

   In the Home panel, the Oracle Cloud login dialog is displayed.

2. Enter your user name and password in the login dialog and click **Sign In**.

   You're now connected to the environment. You'll see the environment library folders and cubes in the Home panel.

Chrome: Sideloading and Logging In

Sideloading on a browser is a way for you to test the Oracle Smart View for Office (Mac and Browser) add-in before deploying it to a wider audience.

See:

- Sideloading on Chrome
- Logging in to Smart View on Excel 365 on Chrome

> **Note:**
>
> The steps in this section are for enabling Smart View in Chrome. Support and instructions for other browsers to be provided in a future update.

Sideloading on Chrome

In this procedure, you'll learn how to quickly sideload the Smart View ribbon in to Excel 365 running on the Chrome browser.

> **Note:**
>
> You must clear the browser cache before sideloading a manifest file. See Clearing the Chrome Browser Cache for more information.

The steps in this procedure assume that you either have not previously deployed Smart View or that you have cleared the browser cache before you begin.

To sideload the manifest file on Chrome:

1. Launch Chrome.

2. Log in to the web application in your test environment before logging in to Office 365 and Smart View.

   For example, if you created a manifest file while logged in to an environment called "pbcspod," then launch Planning on "pbcspod" and log in.

   > **Note:**
   >
   > You must run the service in the browser before logging in to Smart View.

3. Open another tab in the browser and log in to **portal.office.com** using your Office 365 credentials.

4. Click on **Excel** and create a new blank workbook.

5. Go to the **Home** ribbon, and in the **Add-ins** section, click **Advanced**.

6. In the **Office Add-ins** dialog, click **Upload My Add-in**.

7. Browse to the location of the manifest file you created in Creating and Saving the Manifest File.

8. Select the manifest XML file you created and click **Upload**.

   You'll see the tab for the Smart View ribbon and, because you logged in to the environment in step 2, click **Home** in the Smart View ribbon and you should also see your environment's library folders and cubes in the Smart View Home panel.

9. **Optional:** If you plan to sideload multiple manifest files, repeat the steps above for each manifest you want to sideload.

   See Working with Multiple Manifest Files for information on sideloading multiple manifest files.

Logging in to Smart View on Excel 365 on Chrome

If you are continuing with login immediately after sideloading the Smart View add-in, then you should already be logged in to Oracle Essbase or an Oracle Fusion Cloud Enterprise Performance Management service, such as Planning.

If you sideloaded the Smart View add-in in an earlier session, and are not already logged in to a Cloud EPM cloud service, then complete the following procedure to log in to Office 365, your Cloud EPM service, and Smart View.

1. In Chrome, log in to the web application in your test environment before logging in to Office 365 and Smart View.

   For example, if you created a manifest file while logged in to an environment called "`pbcspod`," then launch Planning on `pbcspod` and log in.

   > **Note:**
   >
   > You must have the service running in the browser before logging in to Smart View.

2. Open another tab in the browser and log in to **portal.office.com** using your Office 365 credentials.

3. Click on **Excel** and create a new blank workbook.

4. Go to the **Home** ribbon, and in the **Add-ins** section, click **Advanced**.

5. In the **Office Add-ins** dialog, click **Upload My Add-in**.

6. Browse to the location of the manifest file you created in Creating and Saving the Manifest File.

7. Select the manifest XML file you created and click **Upload**.

8. Select the Smart View ribbon.

9. Click **Home** to launch the Smart View Home panel.

   You should already be logged in to the environment and see the environment library folders and cubes in the Home panel.

   If the Home panel is grayed out, this is a temporary bug. Perform these steps:

   a. Acknowledge the error messages; that is, let the panel time out and click the Retry button, and then time out again and click the Start button.

      The Home panel should no longer be gray.

   b. Log in using your credentials for the environment.

      You'll see the web page for the provider in the panel.

   c. Close the panel.

   d. Click the **Home** button again.

You're now connected to the environment and should now see the environment's library folders and cubes in the panel.

Deploying the Manifest File to Office 365 Users

Once you have created the manifest file, you can deploy it to your Office 365 users.

The procedure in this chapter assumes that you have completed the steps in Creating and Saving the Manifest File and that you are ready to begin deployment to your Office 365 users.

Important! Before deploying the Oracle Smart View for Office (Mac and Browser) add-in to your Office 365 users, you should first sideload the add-in in order to perform your own testing and development tasks. For more information, see:

*   Chrome: Sideloading and Logging In
*   Mac: Sideloading on Excel 365 and Logging In

> ✏️ **Note:**
>
> If the "Include Functions support" option is enabled in the manifest file, users must clear their cache before deployment. See Clearing the Office and Web Cache on a Mac and Clearing the Chrome Browser Cache for more information.

To deploy Smart View to your Office 365 users:

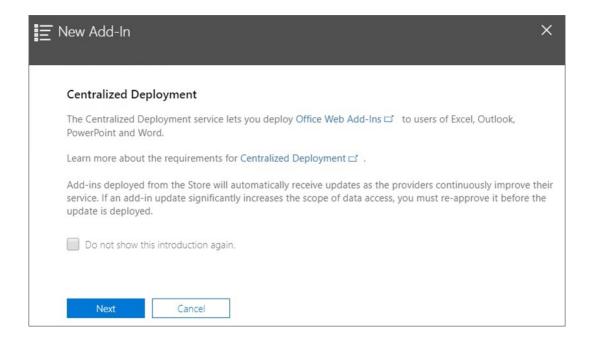1. Log in to Office 365 and click the Admin link to access the Microsoft 365 Admin Center.

2. In the left panel, go to **Settings**, then **Services & add-ins**.

3. On the **Services & add-ins** page, click **Deploy Add-In**.
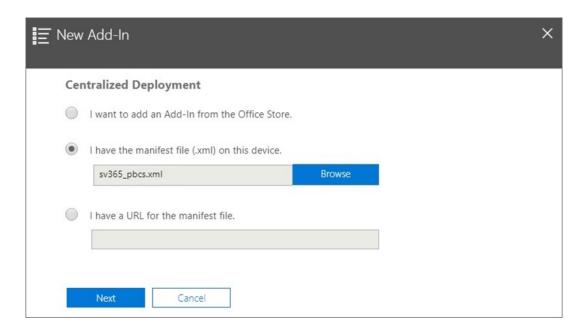

4. In the **New Add-In, Centralized Deployment** wizard, click **Next**.

5. In the second page of the wizard, select **I have the manifest file (.xml) on this device**, then click **Browse**, then navigate to the location of the saved manifest file and select it, then click **OK**, and then click **Next**.

   In this example, we navigated to a locally-saved manifest file called `sv365_pbcs.xml`.
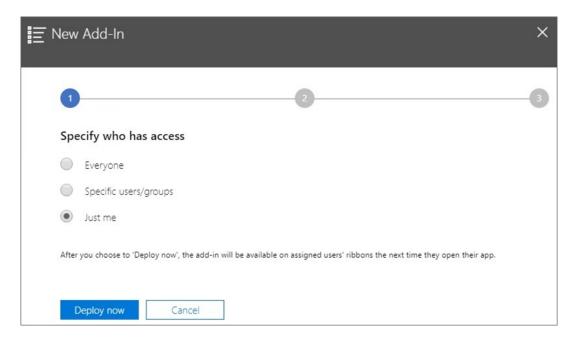
6. Specify who should have access to the Smart View add-in for Office 365, and then click **Deploy now**.

    You can choose to deploy to all Office 365 users, specific users of groups that you have already defined, or just to yourself.

    Note that if you choose **Specific users/groups**, a search box is displayed to assist you in adding users or groups.
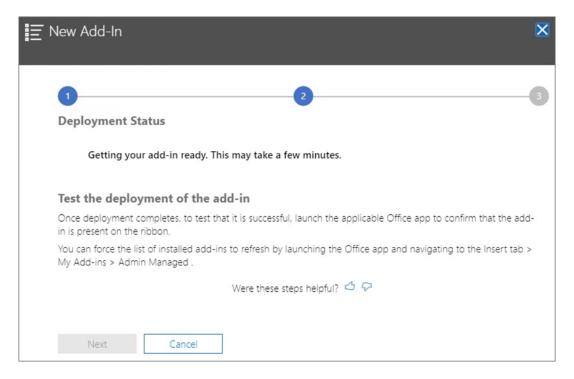

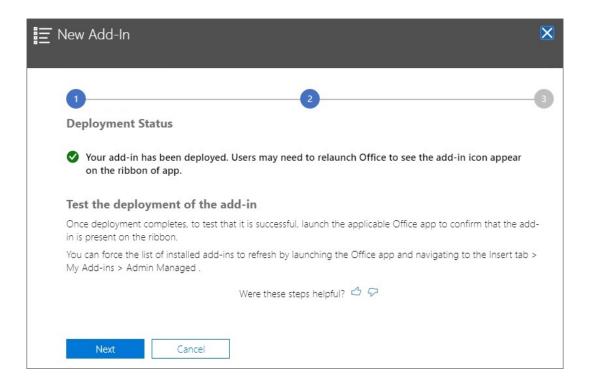   For this example scenario, we'll select **Just me**.

After clicking **Deploy Now**, the deployment is processing.

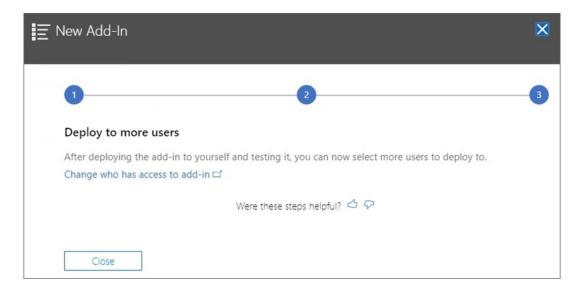You're now moving to step 2 of the deployment wizard; a status screen is displayed:

When the deployment is finished, a green check mark should appear in step 2 of the deployment.
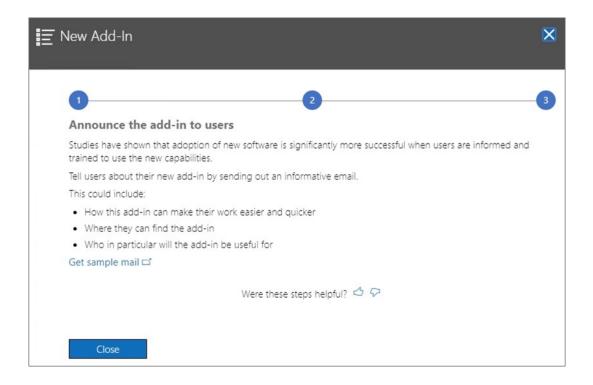
7. Click **Next**.

   You're now in the final step (step 3) of the deployment. Because we chose **Just me** earlier, you now have the option of adding more users to the deployment:

   This screen is displayed if you selected **Everyone** or **Specific users/groups** earlier, giving you the option of reviewing a sample email announcement for the Smart View add-in users.

8. Click **Close**.

   Optionally, if you chose to deploy to other users, click the **Get sample mail link** to view a suggested email text that you can send to users to announce the new Oracle Smart View for Office add-in for Office 365.

9. **Optional:** If you plan to deploy multiple manifest files, repeat the steps above for each manifest you want to deploy.

   Refer to Working with Multiple Manifest Files for information on deploying multiple manifest files.

Users should see the Smart View ribbon the next time they log into Office 365 and launch Excel on a Mac or in a browser.
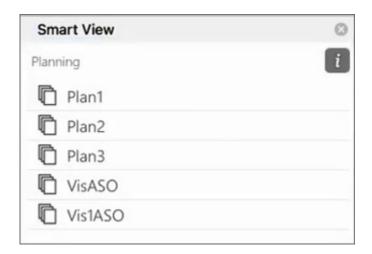
9

Tips and Troubleshooting

Related Topics

- Library Folders do not display in Home Panel (Clear Storage Option)

- Disabling the Popup Blocker on Chrome

- Clearing the Chrome Browser Cache

- Clearing the Office and Web Cache on a Mac

- Task List Display Issue

- Office 365 Add-ins Command Change by Microsoft to Impact Buttons in Smart View (Mac and Browser)

Library Folders do not display in Home Panel (Clear Storage Option)

After login, sometimes the Library folder for your application does not appear in the Home panel. For example:
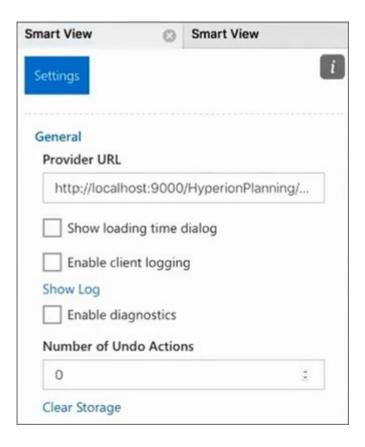

If the Library folder for your application does not display in the Home panel after logging in, try this procedure to clear Smart View cache:

1. In the Smart View ribbon, click the **Options** button:

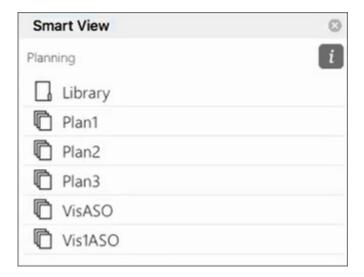**2.** In the **Settings** tab of the **Options** panel, click **Clear Storage**.

3. Exit and then relaunch Excel 365 on the Mac or browser.

   If you have sideloaded the Smart View add-in on Excel 365 on the Mac, then you must perform the sideload again. See Sideloading and Logging In.

4. Select the Smart View ribbon, and then select **Home**.

   The Library folder is displayed in the Home panel along with the application cubes.

Disabling the Popup Blocker on Chrome

To use drill-through, you must disable the Chrome popup blocker for your environment.

To disable the Chrome popup blocker:

1. Click the Chrome menu (the three dots icon, ⋮) on the browser toolbar.

2. Select **Settings**.

3. Scroll down the page and click **Advanced** to see more settings.

4. In the **Privacy and security** section, click ▸ , for **Site Settings**.

5. In the **Pop-ups and redirects** section, click ▸ .

6. Under **Allow**, click **Add**.

   In the **Add a site** dialog, enter the URL for the environment; for example:

   ```
   https://<<your env name>>.oraclecloud.com
   ```

7. Click **Add**.

   The URL should appear in the list under **Allow**.

Clearing the Chrome Browser Cache

Clear the browser cache, along with the contents of two folders in Windows, before sideloading or deploying a modified or updated manifest file in the following cases:
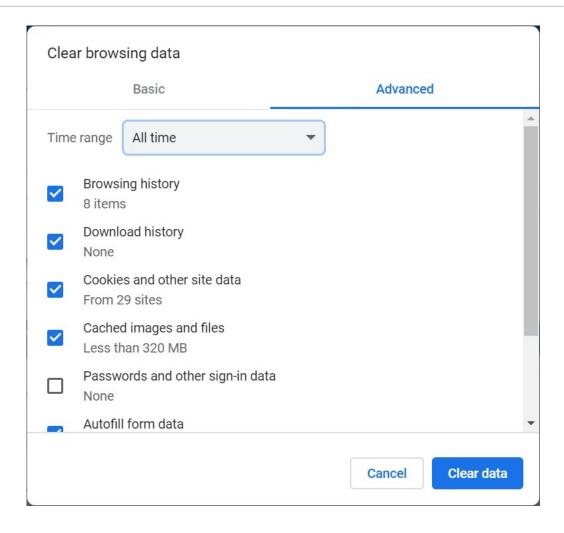
• If you have previously sideloaded the Oracle Smart View for Office (Mac and Browser) add-in in an earlier session.

• If the "Include Functions support" option is enabled in the manifest file, to avoid seeing this error:

   ```
   There was an issue installing custom functions in this add-in. Please try to
   install this add-in again. If this issue persists, please visit: https://aka.ms/
   customfunctions-troubleshooting.
   ```

To clear the cache in Chrome:

1. Launch Chrome.

2. Click the Chrome menu (the three dots icon, ⋮) at the right of the Chrome screen.

3. Select **More tools**, and then **Clear browsing data**.

4. Click the **Advanced** tab, and make these selections:

   • In **Time range**, select **All time**

   • Select all check box items except **Passwords and other sign-in data**, which is cleared

5. Click **Clear data**.

6. In Windows File Explorer, perform these tasks:

   • Clear the contents of this folder:

     ```
     %LOCALAPPDATA%\Microsoft\Office\16.0\Wef\
     ```

   • If it exists, clear the contents of this folder:

     ```
     %userprofile%
     \AppData\Local\Packages\Microsoft.Win32WebViewHost_cw5n1h2txyew y\AC\
     ```

7. Relaunch Chrome.

Clearing the Office and Web Cache on a Mac

Clear the Office and Web cache for Excel on a Mac in the following cases:

• If the provider you are connecting to has been updated; for example, after a monthly update has been applied.

• Before sideloading or deploying a new or modified manifest file.

• If you have previously sideloaded the same Oracle Smart View for Office (Mac and Browser) add-in in an earlier session and are experiencing issues, such as login issues.

• If the **Include Functions support** option is enabled in the manifest file.

To clear the Office cache for Excel on a Mac:

1. Clear the Office cache by manually deleting files:

    a. Close all Office applications.

    b. Delete the contents of the following folder:

    ```
    /Users/{your_name_on_the_device}/Library/Containers/
    com.Microsoft.OsfWebHost/Data/
    ```

    If that folder does not exist on your Mac, then check your system for the following folder locations and, if found, delete their contents:

    ```
    ~/Library/Containers/com.microsoft.excel/Data/Library/Caches
    ```

    ```
    ~/Library/Containers/com.microsoft.excel/Data/Library/Application Support/
    Microsoft/Office/16.0/Wef
    ```

    ```
    com.microsoft.Office365ServiceV2/Data/Caches/
    com.microsoft.Office365ServiceV2/
    ```

    For more information, see Clear the Office cache on the Microsoft support site and see "Clear the Office cache on Mac."

2. Re-sideload or redeploy the manifest file, launch Excel, and log in to Smart View.

    See Mac: Sideloading on Excel 365 and Logging In or Mac: Sideloading on Excel 365 and Logging In.
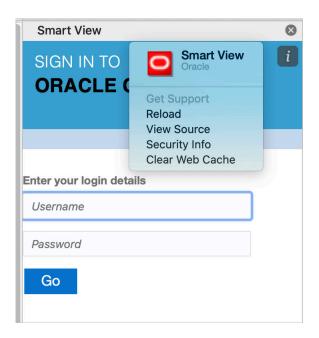
3. Clear the web cache using the **Clear Web Cache** command:

    a. In the Smart View ribbon, select **Home**.

    b. Click the *i* icon in the upper-right corner of the Login dialog or the Home panel to display the"personality" menu.

    c. From the personality menu, select **Clear Web Cache**.

    In this example, the personality menu is accessed from the Login screen:

For more information, see Clear the Office cache on the Microsoft support site and see "Clear the Office cache on Mac."

4. Continue working in Smart View.

Task List Display Issue

The current logged-on user must be assigned to at least two task lists in order to display them in the Task List panel.

If there is only one task list assigned to the current logged-on user, then the following message is displayed in the Task List panel:

• Chrome:

    "TypeError: e is not iterable Please close this panel"

• Mac:

    "TypeError:undefined is not a function (near '...t of e...')Please close this panel"

Workaround: Create another task list for the user.

Office 365 Add-ins Command Change by Microsoft to Impact Buttons in Smart View (Mac and Browser)

To improve security in Office Add-ins, Microsoft Office 365 has made changes to its ExecuteFunction add-in command from October 30, 2022. Since Smart View for Office (Mac and Browser) uses this command in its ribbon buttons and menus, some buttons may stop working from October 30. For example, buttons such as Undo, Redo, or Refresh on the Smart View and provider ribbons. This issue is resolved in the latest Smart View update of 22.11. As the changes are limited to server update, you are not required to create and deploy a new manifest file again for resolving this issue.

For more information on Microsoft's announcement, see Announcing changes to Office Add-ins' ExecuteFunction commands.