

Smart View 20.200 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 20.200

Related Topics

- [Support for Drill-Through to Source](#)
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Support for Drill-Through to Source

When working with Oracle Enterprise Performance Management Cloud data providers, and performing a drill through to display drill data from Oracle Smart View for Office, the system now supports two ways to display the source data:

- Drill through to the source landing web page using a hyperlink. In this case, when you initiate a source drill, the system launches the source landing page in your default browser.
- Drill through to the source data using an EPM Integration Agent query. In this case, the source data is queried and the data is displayed in a new Excel sheet in Smart View.

When this new drill-through option is enabled, your first drill-through operation takes you from your main worksheet to a staging sheet. The staging sheet contains data from the provider source. From this sheet, you can drill further into a data cell to the source data for the selected cell. Drill-through to source is available on any data cell for any dimension/member combination in the staging sheet. From the source sheet, you can navigate back to the staging sheet, and then back to the main sheet. This navigation works even if you rename the staging sheet.

On the staging or source worksheet, you can use the Sheet Info command in the Smart View ribbon to open the Sheet Information dialog and view the sheet type: staging or source.

In earlier releases, drill to source was only available in a Web Form. This new drill-through option lets you drill all the way through to the source data and view the drill-through reports directly in Smart View.

To use this feature, a Service Administrator must first execute a SQL query in the source database and display the results in a pop-window inside Data Integration. For more information, see [Creating a Drill Down to a Source System Without a Landing Page](#) in *Data Integration Administering Data Integration for Oracle Enterprise Performance Management Cloud* .

For information on using this drill-through feature in Smart View, see the topics in [Drill-Through Reports](#) in the *Oracle Smart View for Office User's Guide* .

Vanity URL Support in Smart View

You can use custom, or *vanity*, URLs to access Oracle Enterprise Performance Management Cloud providers from Oracle Smart View for Office. To configure your custom URL, you use a third-party link shortener, such as T.ly, Bitly, Rebrandly, TinyUrl, or is.gd, or an open source solution, such as YOURLS. Then, depending on the configuration, use the custom URL as your shared connection, private connection, or quick connection.

Administrators or Smart View users can create vanity URLs. For detailed information on creating vanity URLs, see the documentation from the third-party link shortener of your choice.

 **Note:**

- When using a vanity URL, there is the possibility of transmitting sensitive data to your third-party link shortening vendor. For example, when performing a refresh or a submit, you may be transmitting password information during the transaction.
- The extension installation and update command, **Check for Updates, New installs, and Uninstalls**, in the Options dialog, Extensions tab is not supported when logged in using a vanity URL.

For information on using vanity URLs to connect to data sources in Smart View, see the topics in [Connecting to Data Sources](#) in the *Oracle Smart View for Office User's Guide*.

New Health Check for Microsoft Office Documents

With the new Health Check tool in Oracle Smart View for Office, you can perform a health check to optimize Smart View performance in a Microsoft Excel workbook, Word document, or PowerPoint presentation.

 **Note:**

This new Health Check tool is a different feature from the system Health Check found in the Help menu on the Smart View ribbon.

The actions you take with the Health Check tool will fix and/or delete some non-Smart View-related objects, optimizing Smart View performance.

You can also use the Health Check tool to get information about specific items in each Office application, such as named ranges, styles, tags, query objects, and other objects.

To access the new **Health Check** dialog, go to the Smart View ribbon, and then:

- In Excel, select **More**, then **Workbook Health Check**

- In Word, select **Document Health Check**
- In PowerPoint, select **Presentation Health Check**

For information on using the new Health Check tool, see [Performing a Health Check on Microsoft Office Documents](#) in the *Oracle Smart View for Office User's Guide* .

Job Console Autorefresh

You can configure the Job Console window to autorefresh at the interval you specify in the new Windows Registry setting, JobConsoleAutoRefreshInterval.

You can still refresh the Job Console window as often as required using the Go button. However, you can also add the JobConsoleAutoRefreshInterval setting to the Registry and observe the window updating automatically, without clicking Go.

Add the JobConsoleAutoRefreshInterval setting as a new DWORD in the HKEY_CURRENT_USER Registry folder here:

```
Computer\HKEY_CURRENT_USER\Software\Hyperion  
Solutions\HyperionSmartView\Preferences
```

Specify the time interval you require. The minimum is 15 seconds (where Base is set to Decimal, and Value Data is set to 15000).

After adding the setting, leave the Job Console window open in Oracle Smart View for Office and note that the window refreshes at the interval specified.

Anyone with permission to modify their computer's Registry can set configure this setting. See [Monitoring Job Status](#) for more information on using the Job Console.

Cell Styles Now Support Multiple Style Properties

You can now apply more than one type of style property to cells using Cell Styles.

In previous releases, using Cell Styles, you could apply only one style property type to a cell—font style, cell background style, or cell border style.

You can now choose to specify one, two, or all three style properties by selecting the check box next to each style property—Font, Background, and Border—and applying a style choice. For example, when connected to a Planning data source, the default style for supporting details cells is a teal-colored background. You may choose to further call out the supporting details cells by applying bold to the font, and adding a blue border around the cells.

Clear the check box next to a property to remove the style. Style properties that are checked, or selected, will still be applied.

See [Cell Styles](#) in the *Oracle Smart View for Office User's Guide* for more information.

New Indentation Option for Standard Mode Ad Hoc Grids

Applies to these 21.02+ Oracle Enterprise Performance Management Cloud: Planning Planning Modules, Financial Consolidation and Close, Tax Reporting

A new option in Oracle Smart View for Office 20.200 preserves native Excel formatting used for indentation in ad hoc grids. The new option, **Use Excel Indentation (Ad-hoc Standard Mode)**, appears in the **Options** dialog, **Member Options** tab.

In Standard mode, when the Smart View **Indentation** option is set to **Subitems**, the blank spaces used for the indentation could create issues for some users. Now, by enabling the **Use Excel Indentation** option, the indentation for subtotals and totals is handled correctly when your application is set to Standard mode, allowing users see the correct member indentation in ad hoc grids.

To enable the **Use Excel Indentation** to improve indentation in ad hoc grids, ensure that you have installed Smart View 20.200 and are connected to a Standard-mode application in your EPM Cloud source 21.02 or later. Then access the **Options** dialog, **Member Options** tab and make these selections:

- Select the **Use Excel Indentation (Ad-hoc Standard Mode)** check box.
- In the **Indentation** drop-down list, select **Subitems**.

Click **OK** to save your selections.

Create a grid layout using ad hoc analysis or open a workbook containing ad hoc grids and click the **Refresh** button in the Smart View ribbon.

For more information, see [Member Options](#) in *Oracle Smart View for Office User's Guide* .

New Option for Greater Row Dimension Flexibility in Flex Forms

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

A new option for row dimensions in flex forms, **Allow flexible definition**, is now available. During form definition, when the **Allow flexible definition** property is applied to row dimensions in flex forms, Smart View users may enter members outside the form definition for dimensions within the row axis of the form. This allows flex form users to enter data for members that are not displayed on the flex form. Users must have access to the valid members that they enter.

For example, using the Vision application, suppose the Product dimension is placed as a row dimension in a flex form. During form definition, only the Sentinal Standard Notebook and Sentinal Custom Notebook members in the Product dimension have been selected for display on the form. By enabling the **Allow flexible definition** option for the Product dimension, Smart View users may enter other products from the Product dimension, such as Tablet Computer or Keyboard, in the rows in the flex form. As long as they have access to those members, users can either add rows for additional members to the existing flex form or replace existing Product members with the Product members they require.

The **Enable flexible definition** option must be selected on a per-dimension basis. The option applies only to the selected dimension; it does not apply to all row dimensions.

To enable the **Allow flexible definition** option for flex forms during form definition, the form must be enabled as a flex form and the **Enable flexible definition** option must be applied to each applicable row dimension.

1. In the **Layout** tab of the form designer, in **Smart View Options**, select **Enable flex forms**.
2. Select a row dimension, and in Dimension Properties, select Enable flexible definition.

The **Enable flexible definition** option will only be visible if the **Enable flex forms** option is selected in **Smart View Options** (step 1).

3. Repeat step 3 for each row dimension that you want to enable for flexible definition.

When there are multiple dimensions on the form rows, you must be sure to select the Enable flexible definition property for each applicable row dimension individually.

You may use the Dimension Properties option, Apply to all row dimensions, to apply the Enable flexible definition property to all dimensions. Use with care as all other dimension property selections will also be applied to all other dimensions on the row segment.

4. Save the form.

For more information, see:

- *Administering Planning:*
 - [Setting Smart View Form Options](#)
 - [Setting Dimension Properties](#)
- [Flex Forms](#) in *Working with Oracle Smart View for Office*

Support for Saving Grids when Ad Hoc Behavior Option is Set to Standard

You can now save ad hoc grids using the Save Ad Hoc Grid button on the provider ad hoc ribbon in Oracle Smart View for Office when the **Smart View Ad Hoc Behavior** option is set to **Standard** in the application. With the proper permission, Smart View users can then save and store ad hoc grids.

Previously, the **Save Ad hoc Grid** option was not enabled on the ribbon when connected to an application where the **Smart View Ad Hoc Behavior** option was set to **Standard**. The **Save Ad hoc Grid** button was available only when this option was set to **Native**.

Note that when the **Smart View Ad Hoc Behavior** option is set to **Standard**, these items are not supported when saving ad hoc grids:

- In the **Save Grid As** dialog, the **Submit Formatting** option
- In the ad hoc grid, empty rows and columns, and Excel text comments

These items will be supported in a future update.

For more information, see [Saving Ad Hoc Grids as Forms](#) in *Oracle Smart View for Office User's Guide* .

Support for EPM Cloud Cell-Level Security in Smart View

Applies to: Planning, Planning Modules, Tax Reporting

A cell in a form may be secured according to a cell-level security definition.

Cell-level security enables Service Administrators to restrict who can view data in the application by defining rules that remove read or write access to cells that a user would normally have access to due to their regular security.

Cell-level security is defined as an exception to the existing member security. For example, a Department Manager requires access to all accounts in their own department, but only a certain account in all other departments. With the usual metadata security the Manager would have access to all accounts across all departments; using cell-level security enables the Service Administrator to control the intersection of all accounts with the Manager's department and only the specific account in all other departments.

Cell-level security uses rules, similar to valid intersection rules, to deny read or write access to users viewing certain cell intersections anywhere a cell is shown (for example, forms, runtime prompts, ad hoc reports, dashboards, and so on). When cell-level security rules are applied, users with read access can see the data value in a cell but the cell is not editable. If users are denied read access to a cell, the value displayed in the cell is #noaccess.

Cell-level Security provides the ability to restrict or remove user security at the lowest level of dimensional granularity, which provides more flexibility and access control than metadata security alone. This feature allows for cross-dimensional security, which means the same dimension member from one dimension may have different access based on combinations of other dimension members.

Note the following when working with cell-level security in Oracle Smart View for Office:

- 32214725 -- If a user does not have access to a cell, cell styles are not applied to cells for Comments and Attachments. However, these styles are applied when using the same form or grid in the web.
- 32367725 -- Ribbon commands, right-click menu commands, and floating toolbar commands in Smart View will still be enabled, even if cell-level security has resulted in the cell containing #NoAccess. For example, if the cell contains #NoAccess, the user can attempt to perform a cell-level command, such as Supporting Detail, Attachments, Cell History, or Cell Comments, but these commands are not valid for #NoAccess.

Service Administrators define cell-level security in the web application. For more information, see [Defining Cell-Level Security](#) in *Administering Planning*.

Narrative Reporting Features and Updates

Related Topics

- [Narrative Reporting 21.06 Extension Update](#)
- [Narrative Reporting 21.05 Extension Update](#)

- [Narrative Reporting 21.03 Extension Update](#)
- [Narrative Reporting 21.02 Extension Update](#)

Narrative Reporting 21.06 Extension Update

The Narrative Reporting 21.06 extension for Oracle Smart View for Office is available to download and install. This update includes general improvements and bug fixes.

Narrative Reporting 21.05 Extension Update

The Narrative Reporting 21.05 extension for Oracle Smart View for Office is available to download and install. This update includes general improvements and bug fixes.

Narrative Reporting 21.03 Extension Update

The Narrative Reporting 21.03 extension for Oracle Smart View for Office is available to download and install. This update includes general improvements and bug fixes, and also supports the following features introduced in the Oracle Enterprise Performance Management Cloud March update:

- **New Doclet Versioning Optimization**

In Narrative Reporting, the process has been updated to minimize the impact of repetitive automated check-ins. Previously, any system update to a doclet file, such as updating variable values or embedded content, resulted in a new doclet version being generated. Now, the generation of new versions will be optimized so that automated check-ins do not always generate new versions.

- **Align Prefix and Suffix Symbols in Reports Cell Number Formatting**

In Reports, use these new properties to align prefix and suffix number formatting symbols in cells:

- **Align Prefix.** Aligns prefixes in the left-most side of each numeric data cell.
- **Align Suffix.** Aligns numeric data values with other cells in the same columns and suffixes in the right-most side of each data cell.

When importing reports in to Smart View as fully-formatted reports or ad hoc grids, using these formatting options will result in improved report display.

For more information on these features, see:

- [Inspecting Doclets](#) in *Working with Oracle Smart View for Office*
- [Formatting Grid Cells](#) in *Designing with Reports for Oracle Enterprise Performance Management Cloud*

Narrative Reporting 21.02 Extension Update

The Narrative Reporting 21.02 extension for Oracle Smart View for Office is available to download and install. This update includes general improvements and bug fixes.

Account Reconciliation Integration with Smart View

You can now use Excel to load transactions into Reconciliation Compliance by using Oracle Smart View for Office with the new Account Reconciliation extension.

Loading Reconciliation Compliance transactions into Account Reconciliation directly from Excel simplifies the load process for users. There is no longer a requirement to take any extra steps to save the transactions to a text file.

To install and work with the Reconciliation Compliance extension for Account Reconciliation, see [Smart View and Account Reconciliation](#) in *Working with Oracle Smart View for Office*.

Smart View Extensions for Task Manager and Supplemental Data Manager

Starting in 21.05, the Oracle Smart View for Office extension for Task Manager and Supplemental Data has been modified. There are now two separate extensions available for download:

- Smart View Extension for Task Manager
- Smart View Extension for Supplemental Data

You can download separate Smart View extensions to work with Task Manager and Supplemental Data.

These extensions apply to Financial Consolidation and Close and Tax Reporting.

The installers for the extensions have the `.svext` file extension. You can download the extensions on the web from the Downloads page of your business process, and then double-click each extension file to install. You can also install from Smart View using the extension installation process: from the Smart View ribbon, select **Options**, then **Extensions**, then **Check for Updates, New Installs, and Uninstalls**. The process is described in [Installing Extensions](#) in *Working with Oracle Smart View for Office*.

If you are using the older extension for Task Manager and Supplemental Data, you must uninstall it, then install the new extensions. In *Working with Oracle Smart View for Office*, see [Uninstalling Extensions](#).

To create connections to the extensions, see [Creating Connections to the Task Manager and Supplemental Data Extensions](#) in *Working with Financial Consolidation and Close Cloud*.

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](#) (MOS) .

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>

Complete installation instructions are in the *Oracle Smart View for Office Installation and Configuration Guide*. This guide is available in the Smart View 20.200 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 Support](#)
- [Microsoft .NET Framework Support](#)
- [Microsoft Office Support](#)
- [Browser Support](#)
- [Smart View and Virtualized Environments](#)
- [Mobile Device Support](#)

Smart View Version Support

Oracle supports and certifies the current release and one release prior (20.200 and 20.100) of Oracle Smart View for Office against current products on Premier Support.

Microsoft Windows Operating System Support

- Oracle Smart View for Office 20.200 is supported on Windows 10.
Smart View 11.1.2.5.520 was the first release to be supported on Windows 10. Earlier versions of Smart View are not supported on Windows 10.
- Smart View 20.200 is supported on Windows 8.1.
- Smart View 20.200 is not supported on Windows 7.

Microsoft .NET Framework Support

To install and use Oracle Smart View for Office release 11.1.2.5.600+, Microsoft .NET Framework 4.5 or higher is required.

Microsoft Office Support

Related Topics

- [Microsoft Office 2010, 2013, 2016, and 2019](#)
- [Microsoft Office 365](#)

Microsoft Office 2010, 2013, 2016, and 2019

Oracle Smart View for Office supports Microsoft Office 2010, 2013, 2016, and 2019.

- Smart View support for Microsoft Office 2019 began with the 11.1.2.5.900 release.
- Smart View support for Microsoft Office 2016 began with the 11.1.2.5.520 release.
- Microsoft announced that the Office 2010 end of life date is October 13, 2020. After that date, Microsoft no longer supports Office 2010, meaning no further new development, technical assistance, or software updates.

Oracle cannot provide support for an application that a vendor no longer supports. Customers currently on Office 2010 should be aggressively planning their own migration to a supported Office version at this time.

For more information on Office 2010 end of life, see the following Microsoft statement:

https://support.microsoft.com/en-us/office/end-of-support-for-office-2010-3a3e45de-51ac-4944-b2ba-c2e415432789?ui=en-us&=en-us&=us#ID0EAABAAA=Office_2010_at_work_or_school

Microsoft Office 365

Smart View for Windows requires locally installed supported versions of Microsoft Office 365 applications, including Office 365 ProPlus installed using Click-to-Run. Smart View (Mac and Browser) provides an interface between Oracle's EPM Cloud solutions and Microsoft Office 365 deployed either in a web browser on Windows or Mac systems, or on Office for Mac.

For more information, see the Knowledge Article entitled *Smart View Support Matrix and Compatibility FAQ (Doc ID 1923582.1)*:

<https://support.oracle.com/epmos/faces/DocumentDisplay?id=1923582.1>

Browser Support

Related Topics

- [Browser Add-ons](#)
- [Browser Version Support](#)

Browser Add-ons

You can use Oracle Smart View for Office to interact with supported browser-based applications in Oracle Enterprise Performance Management Cloud and Oracle Enterprise Performance Management System in two 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.

If your default browser is Mozilla Firefox, Google Chrome, or Microsoft Edge, you'll require a Smart View add-on for drill-through and web launch.

Note:

Starting with the Oracle Enterprise Performance Management Cloud 20.09 update and Oracle Enterprise Performance Management System 11.2.2 release, Internet Explorer 11 is no longer supported, based on the Microsoft recommendation that Internet Explorer users move to the new Microsoft Edge as their default browser. Because Oracle will no longer test EPM Cloud and EPM System using Internet Explorer, existing functionality that currently works with Internet Explorer may no longer work starting with the 20.09 update or release 11.2.2.

Oracle recommends that you move all users 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 20.200 library on the Oracle Help Center.

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

Browser Version Support

Smart View 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.

Smart View and Virtualized Environments

Oracle does not certify Oracle Smart View for Office with virtualized environments formally. Virtualized environments are not supported by Smart View on an official basis.

 **Note:**

Virtualized environments can also be referred to as virtualized desktop integration (VDI) products.

For more information, see the My Oracle Support Knowledge Article "Support for Oracle's Hyperion Products in 3rd Party Virtualized Environments" ([Doc ID 588303.1](#)).

Mobile Device Support

Oracle Smart View for Office is supported on Microsoft Surface Pro tablets only. Smart View is not supported on any other tablet or smartphone.

Supported Languages

The Oracle Smart View for Office user interface supports these languages:

Language	Language	Language	Language
Arabic	Finnish	Italian	Romanian
Chinese (Simplified)	French	Japanese	Russian
Chinese (Traditional)	French (Canada)	Korean	Slovak
Czech	German	Norwegian	Spanish
Danish	Greek	Polish	Swedish
Dutch	Hebrew	Portuguese (Brazilian)	Thai
English	Hungarian	Portuguese (Portugal)	Turkish

Supported Paths to this Release

You can upgrade to Oracle Smart View for Office Release 20.200 from the following releases:

Table 1-1 Supported Paths to this Release

Release Upgrade Path From	To
11.1.2.5.xxx	20.200

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

- [About Defects Fixed in This Release](#)
- [General](#)
- [EPM Cloud](#)
- [Oracle BI EE, Oracle Analytics Cloud](#)
- [Financial Reporting](#)
- [Narrative Reporting](#)

About Defects Fixed in This Release

The topics in this section include defects fixed in Release 20.200. To review the list of defects fixed between earlier releases, use the Defects Fixed Finder This tool enables you to identify the products you own and your current implementation release. With a single click, the tool quickly produces a customized report of fixed-defect descriptions with their associated platforms and patch numbers. This tool is available here:

<https://support.oracle.com/oip/faces/secure/km/DocumentDisplay.jspx?id=1292603.1>

General

- 27781691 – In Oracle Smart View for Office, sheets in a workbook no longer turn in to a black screen when performing a refresh.
- 31314028 --Various issues with workbooks connected to multiple shared connections and containing HsGetValue and HsSetValue functions on multiple sheets are resolved, including: Refresh or Refresh All work as expected when connected to a single data source or connected to multiple data sources; and functions work correctly across multiple providers and URLs, such as Oracle Essbase and Planning.
- 31673838 -- When an extra comma is inserted at the end of a function or within a function (for example, HsGetValue), the #Invalid Syntax message is now correctly displayed. Previously, the #No Connection message was displayed.
- 31681571 -- The issue while loading data using Smart View no longer occurs. Added a fix to preserve formula when changing the pages only if, **Preserve formula on POV change** is enabled.
- 31772096 -- The VBA functions, HypSetOption, now works as expected when used with the HS_MEMBER_DISPLAY option.
- 32041473 --When connected to a Smart View provider, such as Tax Reporting in EPM Cloud or Essbase in EPM System, the **Fix Links** command now works correctly for functions in a workbook that is saved on one machine and then

is opened from a shared file location (for example, SharePoint, OneDrive, or network) on another machine. After running **Fix Links**, perform a refresh to view the expected data. Note that if Smart View is reinstalled on the same machine but in a different folder, the **Fix Links** command may not work. See defect 32170934 in Known Issues, [General](#), for the workaround for this issue.

EPM Cloud

Note:

Unless otherwise noted, the fixed defects described in this "EPM Cloud Fixed Defects" section apply to these Oracle Enterprise Performance Management Cloud services:

- Planning
- Planning Modules, including Strategic Modeling
- Financial Consolidation and Close
- Tax Reporting

EPM Cloud Fixed Defects

- 30146407 -- Oracle Smart View for Office indentation option **Totals** no longer results same as sub items when the Smart View ad hoc behavior set as Native mode.
- 30538404 -- In the Runtime Prompt selection window when launching business rules from Smart View, if the option is changed from **Alias Default** to **None**, you are now able to see the **Period** dimension members.
- 31414510 -- Excel number formatting is now retained when the **Use Excel Formatting** option is selected for values both within and outside an ad hoc grid.
- 31474095 -- When the default value for Runtime Prompt (RTP) is Calc function and member selection is launched for Runtime Prompt, the Calc function is not displayed in member selection.
- 31869856 -- The Smart View panel no longer automatically displays when refreshing a form.
- 31943000 -- The alias name of Level 0 shared members now properly display in the Member Selection dialog in ad hoc grids, and the member selector for forms.
- 31994309 -- Submitting a blank value in a Smart List cell in Smart View no longer causes the cell to display a negative number when the form is opened in the web.
- 32011015 -- Smart View POV member selection is no longer slow with valid intersection and works as expected.
- 32070043 -- In a multiple-grid sheet, when using the default alias table, drill-through reports are now launched as expected.

- 32081347 -- You no longer get an error when opening the Excel sheet and selecting **Panel**, and when opening the Excel sheet and selecting **Refresh All Worksheets**.
- 32177883 -- Entering an invalid value in a Smart List cell, clicking Cancel, and then clicking Submit Data no longer causes a value to be displayed in Cell History.
- 32253860 -- A merge saved with Custom Styles is no longer applied to a form if only Cell Styles are selected. If you need to use either Custom Styles or Custom and Cell Styles (in the Formatting group of the provider ribbon), and your form layout became invalid because of merged cells saved with Custom Styles, complete the procedure described in "Custom Styles and Merged Cells" in the *Oracle Smart View for Office Installation and Configuration Guide* , "Tips and Troubleshooting" chapter.

Oracle BI EE, Oracle Analytics Cloud

- 32071322 – Charts inserted into PowerPoint are no longer duplicated after editing the charts and applying changes, and then refreshing.
- 32114232 -- After inserting a chart into a PowerPoint slide, if data is changed or the chart is edited on the server, then the changes are now shown in the slide upon refresh.

Financial Reporting

30189789 -- In Office 2016 and 2019, Office no longer terminates when launching a Financial Reporting report from any of the supported browsers (Mozilla Firefox, Microsoft Edge, or Google Chrome) using either the Export In Query-Ready Mode command or using the Export to Excel, Word, or PowerPoint command.

Narrative Reporting

Related Topics

[21.06 Narrative Reporting](#)

[21.04 Narrative Reporting](#)

[21.02 Extension](#)

[Smart View 20.200](#)

[20.12 Extension](#)

21.06 Narrative Reporting

These issues are fixed in the 21.06 Narrative Reporting extension update:

- 32662586 -- Excel doclets which contain HsGetValue() functions opened within Office 365 in Oracle Smart View for Office can now be uploaded and checked in as expected.

- 32752686 -- In Smart View, when doclet-related roles—such as responsibility, author, or approver—are assigned to a group rather than individual users, the group name was not shown correctly in the Inspect dialog, Actors tab. With this fix, group names are now shown similar to user names.
- 32795846 -- Reports containing the "transparent" border color property can be downloaded to Excel without error. Instances of the transparent border color property will be substituted with black.

21.04 Narrative Reporting

32392210 -- This issue is fixed in the Narrative Reporting 21.04 and does not require an update to the Narrative Reporting extension for Smart View:

In Smart View, when importing fully-formatted reports, the following formatting issues in Excel are resolved:

- The grid title now properly spans the width of the grid
- Border formatting, including border style and width, is applied in Excel as close as possible to the web version
- The indent property is correctly carried over to Excel

With these fixes, reports are more consistent between Smart View and the web. However, some differences remain; for example, transparent font color does not carry through to Excel. See [Differences between Reports and Reports Imported in Excel](#) in *Reports Designing with Reports for Oracle Enterprise Performance Management Cloud* for more information.

21.02 Extension

These issues are fixed in the 21.02 Narrative Reporting extension update:

- 32138748 – When importing a fully-formatted Management Report in Smart View, selecting a shared member in the POV no longer results in an error, and POV selection works as expected.
- 32176788 -- In Smart View, the currently opened active doclet can now be checked out without issue in cases where sheets were copied between doclets and resulted in duplicate metadata in the sheet. The Narrative Reporting extension now removes the duplicate metadata.
- 32243432 -- For non-English locales, users may now navigate to and open subfolders in the Library without error.

Smart View 20.200

This issue is fixed in the Smart View 20.200 release:

31627727 -- When importing as an ad hoc grid a Management Reporting report that is based on a Standard mode Planning application, Smart View now converts the grid to Native mode, for compatibility with Narrative Reporting. Additionally, Change Alias works as expected.

20.12 Extension

These issues are fixed in the 20.12 Narrative Reporting extension update:

- 31875259 -- When downloaded to Excel, or imported as a fully-formatted report in Smart View, Management Reporting reports that contain conditional formatting using the "replace text" property now correctly show text in place of numbers where conditional formatting was applied. Earlier it remained a number.
- 32064904 -- After embedding content into a PowerPoint doclet and then reformatting the content, the formatting is no longer lost upon refresh.
- 32087989 -- When cells in a Management Reporting grid are formatted to set all borders, the number formatting is now correctly applied in Excel. Earlier, number formatting was not applied correctly in Excel.
- 32107091 -- Management Reporting reports downloaded and opened in Excel or imported in to Smart View as a fully-formatted report now properly retain their cell formatting.

Known Issues

Related Topics

- [General](#)
- [EPM Cloud](#)
- [Essbase, Oracle Analytics Cloud - Essbase](#)
- [Financial Management](#)
- [Narrative Reporting](#)
- [Oracle BI EE, Oracle Analytics Cloud](#)

General

- 21810748 -- In Excel, copying a sheet containing a POV or slider to another sheet in the workbook results in an error.
- 23174312 -- If you are connected to Oracle Smart View for Office and Microsoft PowerPivot at the same time, and then close Excel and reopen Excel, both the Smart View and PowerPivot ribbons are missing from Excel.
Workaround: Terminate the Excel process in Windows Task Manager, then reopen Excel.
- 32170934 -- When connected to a Smart View provider, such as Tax Reporting in EPM Cloud or Essbase in EPM System, and using functions on a machine where Smart View was reinstalled in a different location (for example, originally Smart View was installed in the default installation location and then, on the same machine, Smart View was reinstalled in a non-default location), the functions may not work correctly after reinstalling Smart View. To fix this issue, perform the following steps:

1. In Excel, go to **File**, then **Options**, then **Add-ins**, then **Excel Add-ins**, and click **Go**.
2. In the **Add-ins** dialog, select the check box for **Hstbar**. This gives an error message stating that "the HsTbar.xla file is not found in the location. Do you want to delete it?" Click **Yes** to delete it.
3. Close and relaunch Excel.
4. Open the saved workbook and connect to the data provider.
5. In the Smart View ribbon, go to Functions, and then **Fix Links**.
Fix Links updates the function definitions.

EPM Cloud

Note:

Unless otherwise noted, the known issues described in this "EPM Cloud Known Issues" section apply to these Oracle Enterprise Performance Management Cloud services:

- Planning
- Financial Consolidation and Close
- Tax Reporting

EPM Cloud Known Issues

- 27008788 -- The **Use Double-click for Operations** options works for ad hoc sheets, but not for forms.
- 28891270 -- When using the HsSetValue function to send a Smart List value and then submitting the value, a numeric value is displayed after refresh instead of the Smart List value that was submitted.
- 28891346 -- When using the HsSetValue function to send a date value and then submitting the value, the date displays in a different format after refresh.
- 30447730 – If the **Repeat Member Labels** option is enabled on the provider server, and the **Repeat Member Labels** option is disabled in Oracle Smart View for Office, then, after a submit, users will see the member labels displayed per the setting in Smart View (that is, non-repeating member labels, or merged cells). This is not correct behavior as Smart View should always honor the provider setting when **Repeat Member Labels** is selected in the provider.

Essbase, Oracle Analytics Cloud - Essbase

31721501 -- An issue occurs when all the columns after a grid are formulas (for example, N1:18-EF1:18). Essbase will attempt to validate the grid only until column N.

Workaround: Add a text comment at the end (for example, a period, " ." or an underscore, " _ " EG 1) to make the grid validate the entire region. See [Preserving Excel Formulas Within and Outside of Essbase Ad Hoc Grids](#) in the *Oracle Smart View for Office User's Guide* .

Financial Management

27474347 -- In some cases, when searching for an Entity dimension member in **Member Selection**, the Entity dimension is highlighted instead of the searched-for member.

Narrative Reporting

31507088 -- After importing a Report and performing an **Analyze** on one of the reports, the ribbon focus in the ad hoc grid sheet remains on the Narrative Reporting ribbon.

Workaround: To access the Narrative Reporting Ad Hoc ribbon, switch between another worksheet tab of the workbook and then back to the ad hoc grid sheet for the correct ribbon to come into focus; or, select the Narrative Reporting Ad Hoc tab in the ad hoc grid sheet.

Oracle BI EE, Oracle Analytics Cloud

- 31844307 -- You cannot successfully copy and paste a chart or chart image within Excel (for example, from Sheet 1 to Sheet 2) or from Excel to PowerPoint. You can, however, successfully copy and paste a table view or pivot table within Excel and from Excel to PowerPoint.
- 31908484 -- After inserting a table into PowerPoint and saving the file with a .ppt extension, then double-clicking the file to reopen it, refresh does not work from either the Smart View ribbon or Oracle BI EE ribbon.

Tips and Troubleshooting

Tips and troubleshooting topics are listed in the " [Tips and Troubleshooting](#) " chapter of the *Oracle Smart View for Office Installation and Configuration Guide* .

All Oracle Smart View for Office 20.200 guides are available in the library on the Oracle Help Center:

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

Documentation Updates

Related Topics

- [Accessing EPM Cloud and EPM System Product Documentation](#)
- [Copying and Pasting Code Snippets from PDFs](#)

- [Narrative Reporting Accessibility Updates](#)

Accessing EPM Cloud and EPM System Product Documentation

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

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

EPM Cloud

For EPM Cloud documentation and videos on the [Oracle Help Center](#), click the **Cloud** icon, then **Applications**. On the [Application Services](#) page, click the link for your service in the **Enterprise Performance Management** group.

EPM System

For EPM System product guides to view or download, click the **Applications** icon on the [Oracle Help Center](#). On the [Oracle Applications](#) page, select **Enterprise Performance Management**, and then look for your release on the [Enterprise Performance Management](#) page.

You can also find deployment-related documentation on the Oracle Technology Network (<http://www.oracle.com/technetwork/index.html>) and on the Oracle Software Delivery Cloud website (http://edelivery.oracle.com/EPD/WelcomePage/get_form).

Copying and Pasting Code Snippets from PDFs

When you cut and paste code snippets from a PDF file, some characters can be lost during the paste operation, making the code snippet invalid.

Workaround: Cut and paste from the HTML version of the document.

Narrative Reporting Accessibility Updates

- 20140751 -- In Oracle Smart View for Office, when using keyboard controls in the Review Comments panel to open the Sort Comments or Filter Comments menu, use the up or down arrow key to navigate to a sort or filter option, and then press Enter to sort or filter comments according to your selection. Pressing Enter is required in order to maintain focus on the selected option.
- 27913684, 30284549 -- Focus issues can occur when using the keyboard in the following situations:
 - 27913684 -- After creating a report page using the keyboard. You can get back to the Home panel and open the report package by pressing the F6 function key until the Home panel is in focus, and then press Ctrl+Tab to move the cursor within panel until the report package is in focus. Then press Enter to open the report package.

- 30284549 -- After opening a doclet using the keyboard. You can get back to the task pane by pressing the F6 function key until the task pane is in focus, and then press Ctrl+Tab to move the cursor among the panes within the task pane until "root" is in focus. Then press Enter to ensure that the Doclet Panel is refreshed.

If pressing F6 doesn't display the panel or pane that you want, try pressing Alt to select the menu bar, then Ctrl+Tab to move to the task pane.

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 12.0.2
- Office PIA 14.0
- InstallShield 2019
- Open XML SDK 2.10.0
- Zlib Data Compression Library 1.2.11

Oracle® Smart View for Office Readme
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