

Smart View 21.100 Readme

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 21.100

Related Topics

- [Flex Form Enhancements](#)
- [Enhanced Ad Hoc Operations Available in EPM Cloud Standard Mode Applications](#)
- [New VBA Functions](#)
- [New Smart View Function, HsGetSharedConnectionURL](#)
- [URL Connection Support in Smart View Functions](#)
- [New Options for Filtering Business Rules](#)
- [Change the Alias Table when Setting User Variables in User Preferences](#)
- [Improved Duplicate Alias Handling in Row Drop-down Member Selector](#)
- [New Default Behavior for Opening Saved Ad Hoc Grids](#)
- [Enhanced Shared Member Zoom In for EPM Cloud](#)
- [New Books Extension for Importing Books in to Smart View](#)
- [Support for Microsoft Edge WebView2](#)
- [Narrative Reporting Features and Updates](#)

Flex Form Enhancements

This release introduces two enhancements to flex forms:

- [Member Selection Support on Flex Forms](#)
- [Preserve POV or User Variable Changes on Refresh](#)

These EPM Cloud business processes support flex forms: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Member Selection Support on Flex Forms

You can now select row members to add to a flex form using the **Member Selection** dialog box, available from the provider ribbon; for example, from the Planning ribbon.

The new **Member Selection** option is available only on flex forms, not on simple forms.

In flex forms, you can use the **Member Selection** dialog to add row members to form, similar to adding members to an ad hoc grid.

The members you can add depend on the underlying form definition for the row dimensions:

- If the **Dimension Properties** setting, **Allow flexible dimension**, is selected, users may select members outside those specified in the form definition. For example, suppose a form includes only the Computer Accessories members from the Product dimension. If **Allow flexible dimension** is selected for the Product dimension, then users may add other members from Product, such as Notebooks or Tablets, to the flex form. These members will be retained upon refresh.
- If specific members are excluded from a dimension in a flex form, then, even though you may be able to select and add them in the **Member Selection** dialog, they will be removed upon refresh.

Member Selection uses the default alias table defined at the application level. When members are inserted on the grid, the members are displayed as member names until a Refresh is performed, and then aliases are displayed corresponding to the application setting.

The new **Member Selection** option is available in the Analysis group on the provider ribbon.

Note:

- You cannot add column members. You can only add row members.
- You can still add row members by entering member names directly on a flex form.

Preserve POV or User Variable Changes on Refresh

A new member option in Oracle Smart View for Office allows you to retain modified members on a flex form after changing the POV or any user variables and then refreshing.

In previous releases, a change to the POV or any user variable removed any modified members on the flex form upon refresh.

To retain modified members on a flex form after a POV or user variable change, you must enable the new **Flex Forms: Preserve Grid on POV and User Variable Changes** option. In the Smart View ribbon, click **Options**. In the **Options** dialog, **Member Options** tab, select the new option, **Flex Forms: Preserve Grid on POV and User Variable Changes**. If this option is not selected, any modified rows in the flex form will be removed upon a POV or user variable change.

After selecting the **Flex Forms: Preserve Grid on POV and User Variable Changes** option, add or delete members on the flex form grid, and click **Refresh**. Then change a POV member and click **Refresh**; or change a user variable and the flex form refreshes automatically. Your modified members are retained. You can now enter and submit data against the modified POV and user variables in any of the members in the flex form, including any newly-added members. Optionally, change the POV or any user variable again and refresh, and then continue entering data against the updated POV and user variables.

In *Working with Oracle Smart View for Office*, see:

- [Flex Forms](#)
- [Member Options](#)
- [Selecting Members from the Member Selector](#)

In *Administering Planning*, see [Designing Flex Forms](#).

Enhanced Ad Hoc Operations Available in EPM Cloud Standard Mode Applications

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

When connected to Standard mode applications, several ad hoc operations are now available in Oracle Smart View for Office.

In a Standard mode application, the **Smart View Ad Hoc Behavior** option is set to **Standard**. Service Administrators set this option in the Oracle Enterprise Performance Management Cloud application.

Note:

This feature requires EPM Cloud 21.07+.

Once connected to a Standard mode application, Smart View users can access these ad hoc features:

- [Additional Zoom In Options](#)
- [Multiple-cell Select for Ad Hoc Operations](#)

Additional Zoom In Options

These additional commands are available from the drop-down menu on the **Zoom In** button in the provider ad hoc ribbon:

- **Sibling Level**—Select to retrieve data for the siblings of the selected member or members. For example, in the Vision sample database, a zoom in operation on Jan retrieves Jan, Feb, and Mar.
- **Same Level**—Select to retrieve data for all members at the same level as the selected member or members. For example, in the Vision sample database, a zoom in on Q1 retrieves Q2, Q3, and Q4.
- **Same Generation**—Select to retrieve data for all members of the same generation as the selected member or members. For example, in the Vision sample database, a zoom in on Q1 retrieves Q2, Q3, and Q4.

Note:

Zoom In on Formula is not yet supported.

Multiple-cell Select for Ad Hoc Operations

You can now select multiple row or column member cells and then perform any of the following actions:

- **Zoom In**, including any of the zoom options, such as Bottom Level or Same Generation.
- **Zoom Out**. Zooming out collapses the view to the next upper level.
- **Keep Only** and **Remove Only**. Note that the integrity and validity of the grid must be maintained. If your selections cause an issue with the grid, Smart View display a warning message informing you of the issue, and no change is made to the grid.

For more information on ad hoc analysis, see these topics in the "Ad Hoc Analysis" chapter in *Working with Oracle Smart View for Office*:

- [Zooming In and Out](#)
- [Removing Selected Members From the Grid](#)

For information on setting the **Smart View Ad Hoc Behavior** option in your application, see the applications settings documentation for your business process. For example, see [What Application and System Settings Can I Specify?](#) in *Administering Planning*.

New VBA Functions

This release introduces these new VBA functions:

[HypSetUserVariable](#)

[HypListUserVariables](#)

[HypOpenFlexForm](#)

HypSetUserVariable

The `HypSetUserVariable` function allows users to set a specific member for an existing user variable. User variables limit the number of members displayed on a form, helping users focus on certain members.

`HypSetUserVariable` is supported for these data sources: Financial Consolidation and Close, Planning, Planning Modules, Tax Reporting, and Oracle Hyperion Planning (on-premises).

See [HypSetUserVariable](#) in the *Oracle Smart View for Office Developer's Guide* .

HypListUserVariables

The `HypListUserVariables` function returns the list of user variable names associated with an application.

`HypListUserVariables` is supported for these data sources: Financial Consolidation and Close, Planning, Planning Modules, Tax Reporting, and Oracle Hyperion Planning (on-premises).

See [HypListUserVariables](#) in the *Oracle Smart View for Office Developer's Guide* .

HypOpenFlexForm

`HypOpenFlexForm()` opens the specified flex form.

Flex forms are a form type that provides flexible row management in Oracle Smart View for Office. With flex forms, you can rearrange row dimensions, sort them, and insert valid members or aliases from corresponding dimensions. You can then enter and submit data on intersections that may not have otherwise been present on the form.

`HypOpenFlexForm` is supported for these EPM Cloud data sources: Planning, Planning Modules, Financial Consolidation and Close, and Tax Reporting.

See [HypOpenFlexForm](#) in the *Oracle Smart View for Office Developer's Guide* .

New Smart View Function, HsGetSharedConnectionURL

This release introduces a new Oracle Smart View for Office function, `HsGetSharedConnectionURL()`. Use the `HsGetSharedConnectionURL` function to quickly identify the shared connection data source that is being used. This can be helpful when you're unsure whether you are connected, for example, to a production or test environment.

To use the `HsGetSharedConnectionURL` function, simply type the function name in any cell as follows:

```
=HsGetSharedConnectionURL()
```

Press the Enter key and the shared connection URL is instantly displayed in the cell.

You can also enter the function by starting to type the function name into a cell; for example, type:

```
=hs
```

In the drop-down list of functions, double-click HsGetSharedConnectionURL. In the formula bar or directly in the cell in the grid, add the close parenthesis,), and then press Enter to display the shared connection URL.

After using the function, you may delete the URL from the cell if it is no longer needed.

See "HsGetSharedConnectionURL" in the *Oracle Smart View for Office User's Guide*.

URL Connection Support in Smart View Functions

You can now use URL connection information in Smart View functions, such as the HsGetValue or HsSetValue functions. Support for URLs is added to address limitations that can occur when using private connections in functions. Because users can define friendly names for private connections, there is a dependency on registry entries to resolve the connection information. With URLs in functions, you can use a private connection in your function without depending on a friendly name.

Similar to the workspace function token, WSFN, this feature uses the token, URLFN. URLFN is a string in a specific format from which the connection information is extracted.

For example, here is the syntax for the HsGetValue function using the URL for a connection to a Planning business process:

```
HsGetValue("URLFN|URL|Server|Application|Database", "POV")
```

We'll substitute the Planning private connection string, `http://<planning_service_url>/HyperionPlanning/SmartView` for the *URL* variable, and `<planning_service_url>` for the *Server* variable, as follows:

```
=@HsGetValue("URLFN|http://<planning_service_url>/HyperionPlanning/  
SmartView|<planning_service_url>|Vision|Plan1|"Account#All  
Accounts", "Period#Q2", "HSP_View#ConsolidatedData", "Year#FY20", "Scenario#Cu  
rrent", "Version#Working", "Entity#Total Entity", "Product#Computer  
Equipment")
```

All the information needed to make a connection is part of the token, as shown above. If the token contains any invalid information, then generally a #NoConnection error is shown, with the following exceptions for the Server token:

- For Oracle Enterprise Performance Management Cloud business processes, such as Planning, the Server token can be blank (or invalid)
- The Essbase Server token can be blank only
- Oracle Hyperion Financial Management requires the Server token parameter

If you launch Function Builder while connected to an application using a private connection which does not have a friendly name, then Function Builder will generate the URL function token that will be used in place of the connection name.

You should not modify the URL token string unless you have the knowledge to edit it correctly. Likewise, the URL token string can also be entered manually in the Connection field in the Function Builder, and in cell references, but Oracle recommends that you do this only if you know how to generate the URL token string in the proper format.

All other functionality related to Oracle Smart View for Office functions remains the same; no previous functionality is affected.

In the *Oracle Smart View for Office User's Guide*, see the Functions chapter, [Function Descriptions](#) for more information on using this new connection format.

New Options for Filtering Business Rules

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

New options for filtering rules are available in the Business Rules dialog box.

When you run business rules, new filter options appear at the top of the **Business Rules** dialog. The new filtering options allow you to quickly filter and locate the business rules to run, which can be especially helpful when you are working with a large number of business rules.

Rules are categorized by Plan Type (cubes) and Rule Type. You filter rules by selecting and clearing check boxes for Plan Types and Rule Types. You may filter rules by any combination of cube and rule type. Simply clear the check boxes next to the Plan Types and Rule Types to remove from the list those business rules that you do not want to view. The business rules displayed in the list are instantly filtered according to your selections. Alternatively, clear all the check boxes and then select only the Plan Types and Rule Types that you want to view in the list. Select all the check boxes to again view the entire list of business rules. After making your filtering selection, select the business rules to run.

To work with the new filtering options in the Business Rules dialog:

- For Planning, Planning Modules, Financial Consolidation and Close, and Tax Reporting, see [Launching Business Rules in Excel](#) in *Working with Oracle Smart View for Office*.
- For on-premises Oracle Hyperion Planning, see [Launching Business Rules in Excel](#) in the *Oracle Smart View for Office User's Guide*.

Change the Alias Table when Setting User Variables in User Preferences

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

When setting user variables in the Preferences dialog in Oracle Smart View for Office, you can now apply an alias table to the members in the Member Selection dialog box.

In the Preferences dialog, User Variables tab, select the ellipsis (...) next to a dimension name to launch the Member Selection dialog box. From the Options drop-down list (the third button above the left panel of the dialog), select Alias Table, and then choose an alias table from the list in the popup window. Selecting a table then closes the window. Your alias table selection is now applied to the members in the Member Selection dialog. Select a member for the user variable, and then close the dialog.

Changing the alias table in the Member Selection dialog box affects only the view in the dialog when setting user variables. It does not affect how members are displayed Selected Member field in the Preferences dialog, or in the grid or form. (32539218)

See:

- [Setting User Preferences](#) in *Working with Oracle Smart View for Office*
- [Setting User Preferences](#) in the *Oracle Smart View for Office User's Guide*

Improved Duplicate Alias Handling in Row Drop-down Member Selector

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

In the row drop-down member selector in forms, you can now enter and submit data without a "member out of place" error occurring in Oracle Smart View for Office. When selecting and working with shared members or members associated with duplicate alias names, the drop-down member selector now displays member names for shared members and duplicate aliases, not their qualified or distinct alias names. (30724553)

See [Using the Drop-down Member Selector on Row Dimensions in Forms](#) in the *Oracle Smart View for Office User's Guide* .

New Default Behavior for Opening Saved Ad Hoc Grids

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

Starting in this release, the default option for opening a saved ad hoc grid is **Ad hoc analysis**. This means that you may double-click on a saved ad hoc grid in the Smart View Panel and open it as an ad hoc grid. In prior releases, double-clicking on a saved ad grid would open the grid as a form.

For example, in Oracle Smart View for Office, you connect to an EPM Cloud business process, such as Planning, or to on-premises Oracle Hyperion Planning, and you create an ad hoc grid. You use the **Save Ad Hoc Grid** command on the provider ad hoc ribbon to save the ad hoc grid to a folder in your business process or server library. You can then open the saved ad hoc grid in Smart View as an ad hoc grid or form. To open the saved ad hoc grid as a grid, navigate to the grid in the Smart View Panel and double-click it.

Also note that the **Ad hoc analysis** option is now the bolded default option when you selected a saved ad hoc grid in Smart View in these cases:

- On the right-click menu
- On the Action Panel

You still have the option to open the saved ad hoc grid as a form in both of the above cases. Only the double-click will always open the saved ad hoc grid as a grid.

Note that the form resulting from a saved ad hoc grid is a very basic form and may likely require further editing in the EPM Cloud business process or in Oracle Hyperion Planning.

See [Saving Ad Hoc Grids](#) in the *Oracle Smart View for Office User's Guide* .

Enhanced Shared Member Zoom In for EPM Cloud

Data source types: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

If your administrator enables the new application setting, **Drill to All Levels in Base**, available in the 21.09 update, and you're working with a Standard mode application, you can zoom in beyond just the shared members into all levels or only the bottoms levels within the base hierarchy using the Zoom In options, **All Levels** and **Bottom Level**.

To learn more about zooming in on shared members in Oracle Smart View for Office, see [Zooming in on Shared Members in EPM Cloud](#).

Service Administrators: The new application setting, **Drill to All Levels in Base** works with the **Allow drill down on shared members in ad hoc** setting. To enable these settings, see [What Application and System Settings Can I Specify?](#) in *Administering Planning*.

New Books Extension for Importing Books in to Smart View

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

The new EPM Books extension for Oracle Smart View for Office allows you to import EPM Cloud Books into Excel in a refreshable format.

In Oracle Enterprise Performance Management Cloud, Books are a collection of one or more Reports, Books, and other documents. Using the EPM Books extension for Smart View, 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.

After installing the Books extension, launch the EPM Books panel from Smart View using the Launch EPM Books Home link in the Action Panel. The Launch EPM Books Home link is available from any Office application (Excel, Word, or PowerPoint). Clicking the link launches the EPM Books panel.

In the top portion of the panel, you can view a list of available Books to import, view the properties for each Book, and run Book "jobs." Each Book you run is listed as a job in the Jobs Console portion of the Books panel. In the Jobs Console, you can view the status of jobs and manage jobs. When a job is completed, a download button is displayed, which you click to import the Book to Excel. Note that Books always launch in Excel, even if you launched the Books panel from Word or PowerPoint.

In the imported Book, each report is placed on an individual worksheet. A table of contents sheet is generated with links to the individual report sheets in the workbook, based on the TOC Headings defined in the Book Designer in the web application.

After downloading a Book into Smart View, the Books ribbon is displayed. From the Books ribbon, you can change the POV of the Reports in the Book, and refresh the book content. You can also use the Inspect button to view properties of the Book, including the POV.

 **Note:**

Keep in mind these considerations when working with Books in Smart View:

- Only Reports are included in the Book imported into Excel. Inserted books or third-party documents, such as PDFs or Microsoft Word documents, are not included in the Excel Book import.
- Changing the POV: Excel currently does not support Member Selection in the Select POV dialog if the Book POV definition is set to "All".
- If the Book POV definition is set to "Display Selected Values," the list of available members to choose from is displayed in the drop-down list for each dimension.

When connected to a non-Narrative Reporting data source, users will not be prompted to enter POV selections before importing the book to Excel, even when the Preview POV preference is enabled.

To begin working with EPM Books in Smart View, install the Books extension using the Smart View extension installation process: from the Smart View ribbon, select **Options**, then **Extensions**, then **Check for Updates, New Installs, and Uninstalls**. The complete process for installing and connecting is described in the "Books" chapter, [Setting Up the Books Extension in Smart View](#) in *Working with Oracle Smart View for Office*.

Once the Books extension is installed, see these topics for more information on working with Books in Smart View:

- [Launching the EPM Books Panel in Smart View](#)
- [Working with Books](#)
- [Managing Jobs in the EPM Books Jobs Console](#)

Support for Microsoft Edge WebView2

Starting with the 21.100 release, Oracle Smart View for Office supports Microsoft Edge WebView2.

Smart View uses the Microsoft Internet Explorer module to display the authentication page. But certain authentication schemes may require newer controls, such as WebView2, to process a complex login sequence. To use WebView2, Microsoft Edge WebView2 Runtime should be installed and enabled on each Smart View client machine.

For more information on WebView2 in Smart View, see [Microsoft Edge WebView2 Support](#) in the Platform Support section of this readme.

Narrative Reporting Features and Updates

Related Topics

- [Narrative Reporting 21.11 Extension Update](#)
- [Narrative Reporting 21.09 Features](#)
- [Save Office Documents to EPM Cloud in Narrative Reporting in Smart View](#)
- [Narrative Reporting 21.07 Extension Update](#)

Narrative Reporting 21.11 Extension Update

The Narrative Reporting 21.11 extension for Oracle Smart View for Office is available to download and install. This update includes general improvements and bug fixes.

Narrative Reporting 21.09 Features

Related Topics

- [Suppress Doclets in a Report Package](#)
- [Recall Doclets in a Report Package](#)
- [Narrative Reporting 21.09 Extension Update](#)

Suppress Doclets in a Report Package

At times, a particular note or disclosure within your report package may not be required for the current reporting period. Now, in Narrative Reporting web, you can choose to suppress a doclet's contents within the report package. The suppressed doclet's contents will not be included within the report package's output. You can later change the setting to include the doclet content in the report package. This feature lets you keep the doclet definition and structure for future executions of the report package when its contents may be required.

You can view a doclet's suppression status in Oracle Smart View for Office using either of these methods:

- Select the doclet in the Report Center, and then click **Properties** in the Action Panel.

- Alternatively, if the doclet is open, then on the Narrative Reporting ribbon, click **Inspect** to access the **Properties** dialog. status.

Then note the suppression status in the **Suppress Doclet** field.

This features requires the 21.09 Narrative Reporting extension update.

See [Adding Doclets to Report Package Structures](#) and [Inspecting Doclets](#) in *Working with Oracle Smart View for Office*.

Recall Doclets in a Report Package

Authors and Approvers now have a new workflow action to "Recall Doclet" that restarts the doclet workflow, allowing them to modify the doclet contents as needed. The Recall Doclet action gives both Authors and Approvers greater autonomy in the development of their report contents.

Previously, once an Author submitted or Approver approved a doclet, they could no longer update the doclet's contents if additional modifications were needed. The Report Package Owner was required to either reject or restart the doclet workflow.

With the **Recall Doclet** action, recalling a doclet restarts the authoring process for only the selected doclet, and authors may continue their modifications. Authors can submit the updated doclet for approval if an approval phase is needed.

During the Author phase of the report package definition, the Report Package Owner (RPO) must enable the **Allow Authors to recall doclets** setting in Narrative Reporting web.

After Authors have submitted or Approvers have approved a doclet, the **Recall Doclet** option is available on the Narrative Reporting ribbon in Oracle Smart View for Office to both Authors and Approvers.

Smart View users can then open a submitted doclet and click the **Recall Doclet** button and continue work on the doclet.

This features requires the 21.09 Narrative Reporting extension update.

See [Recalling Doclets](#) in *Working with Oracle Smart View for Office*.

Narrative Reporting 21.09 Extension Update

The Narrative Reporting 21.09 extension for Oracle Smart View for Office is available to download and install. This update includes the Recall Doclet and Suppress Doclet features, along with general improvements and bug fixes.

Save Office Documents to EPM Cloud in Narrative Reporting in Smart View

In Oracle Smart View for Office, you now have the ability to save Microsoft Office documents (Word, Excel, and PowerPoint files), to the Oracle Enterprise Performance Management Cloud Library.

Users often share Office documents by emailing them, or saving them to an internal location. Storing files in the EPM Cloud Library gives users a new option for saving files in a central location and facilitates sharing documents with other users.

Documents you save in the EPM Cloud Library follow the access control currently in place in your environment. By configuring the access control rights, you can use the EPM Cloud Library to share files with other users.

You can also download saved files from the library.

 **Note:**

This feature is available to all EPM Cloud business processes that work with Smart View. But currently, only the EPM Cloud Library in Narrative Reporting 21.07+ supports this feature. Narrative Reporting must be provisioned in your EPM Cloud subscription; however, the Narrative Reporting extension is not required.

To enable this feature, an update is made to the new `libraryprovider` property in the `properties.xml` file, located in the `cfg` folder of the Smart View installation. The `properties.xml` file must be updated on each individual user's machine. A Service Administrator will likely complete this task, and then distribute the file to users.

Once the `properties.xml` file is distributed, users can see the new **Save** and **Save As** options on the Smart View ribbon the next time they start Smart View.

Users may organize documents by creating folders in the EPM Cloud Library. They can create folders in Narrative Reporting web or in the tree structure in the Smart View panel under the **Documents** node.

 **Note:**

In order to create folders in Smart View, and to view the folders and files under the **Documents** node in the Smart View panel, users must be connected to their Narrative Reporting business process.

No connection is necessary in order to perform a **Save** or **Save As**.

Any Word, Excel, or PowerPoint file may be saved to the EPM Cloud Library. The files do not need to be connected in any way to an EPM Cloud business process.

Consider the following when working with the **Save** and **Save As** options:

- **Save**

By default, the **Save** option saves the Office file to My Library, which is your personal folder. A message alerts you to a successful or failed save; click OK in this message. Other users will not have access to this folder or the saved file. You can download and work with files saved to My Library. After downloading and modifying a file, click **Save** to save the file back to the same location in My Library. Use the **Save As** option to save the file to a folder location accessible to others within the EPM Cloud Library.

- **Save As**

Use the **Save As** option to add files to the folder you choose in the EPM Cloud library. In the **Save to Cloud** dialog:

- **Library folder location**—Use the **Browse** button to navigate to the folder to save the file.
- **Artifact name**—Enter a name for the file; the name does not need to be the same as the actual file name.
- **Artifact description**—Enter an optional description for the saved file.

You and other users can download and work with files saved to folders in the EPM Cloud Library. After downloading and modifying a file, click **Save** to save the file back to the same location in the EPM Cloud Library. Use the **Save As** option to save the file to a different folder location accessible to others within the EPM Cloud Library.

 **Note:**

If you use Narrative Reporting:

- If you have enabled the Narrative Reporting extension, you will see some folders under the **Library** node repeated under the **Documents** node in the Smart View panel. This is a virtual view of the folders and does not affect the behavior of the **Save** or **Save As** options. You can access your saved content from either location in the tree.
- When saving a doclet from a report package, the doclet will lose all metadata associated with Narrative Reporting and the report package; it becomes a regular Office document. Upon **Save** or **Save As**, the Office document is closed. You can reopen the saved document from the location where you saved it by selecting it from the tree in the Smart View panel.

For more information on saving Office documents to the EPM Cloud from Smart View, see "Saving Office Documents to EPM Cloud " in the *Oracle Smart View for Office User's Guide* .

Narrative Reporting 21.07 Extension Update

The Narrative Reporting 21.07 extension for Oracle Smart View for Office is available to download and install. This update includes general improvements and bug fixes.

Installation Information

You can download this release from My Oracle Support:

<https://support.oracle.com>

For information on Oracle Smart View for Office, including the link to downloading the latest Smart View release, refer to the My Oracle Support Knowledge Article "Smart View Support Matrix and Compatibility FAQ" (Doc ID [1923582.1](#)). To access the Knowledge Article, you must have a user account with [My Oracle Support](#).

As a best practice, Oracle recommends periodically checking for and downloading the latest Smart View release from the Knowledge Article, Doc ID [1923582.1](#), on MOS:

<https://support.oracle.com>

Complete installation instructions are in the *Oracle Smart View for Office Installation and Configuration Guide*. This guide is available in the Smart View 21.100 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 (21.100 and 20.200) of Oracle Smart View for Office against current products on Premier Support.

Microsoft Windows Operating System Support

- Oracle Smart View for Office 21.100 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 21.100 is supported on Windows 8.1.
- Smart View 21.100 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 2013, 2016, and 2019](#)
- [Microsoft Office 365](#)

Microsoft Office 2013, 2016, and 2019

Oracle Smart View for Office supports Microsoft Office 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 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](#)
- [Microsoft Edge WebView2 Support](#)

Browser Add-ons

You can use Oracle Smart View for Office to interact with supported browser-based applications in Oracle Enterprise Performance Management Cloud and Oracle Enterprise Performance Management System in 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 21.100 library on the Oracle Help Center.

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

Browser Version Support

Oracle Smart View for Office does not have a browser version dependency; however, it is possible that the products that Smart View works with do.

For your platforms and products, check the system requirements and supported platforms documents, and specific product readmes for any additional browser support requirements.

Microsoft Edge WebView2 Support

Oracle Smart View for Office uses the Microsoft Internet Explorer module to display the authentication page. But certain authentication schemes may require newer controls, such as WebView2, to process a complex login sequence. To use WebView2, Microsoft Edge WebView2 Runtime should be installed and enabled on each Smart View client machine.

Starting with the 21.100 release, Smart View supports WebView2. During runtime, Smart View detects the presence of Microsoft Edge WebView2 Runtime installed on the machine and launches the WebView2-based dialog to host the login page.

Once WebView2 is installed on Smart View client machines, users can enable it in the Smart View Options section of Health Check (described in [Performing a Health Check On Your System](#) in the *Oracle Smart View for Office User's Guide*). WebView2 can also be enabled by editing the Smart View properties.xml file (by default in C:\Oracle\SmartView\cfg).

Administrators: If WebView2 is required to handle the login sequence used by your organization, then you should ensure that Microsoft Edge WebView2 Runtime is installed and enabled on the machines running Smart View. If you are installing

Microsoft Edge WebView2 Runtime, Oracle recommends using the Evergreen version. Only WebView2 versions 86.0.616.0 and later are supported.

Once installed, Microsoft distributes WebView2 updates on a regular cadence, unless a fixed version was installed. Administrators can use their own internal procedures to download and distribute Microsoft Edge WebView2 Runtime to Smart View users. The download is here:

<https://docs.microsoft.com/en-us/deployoffice/webview2-install#webview2-runtime-installation>

For more information, see the [WebView2](#) documentation.

Smart View and Virtualized Environments

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

Note:

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

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

Mobile Device Support

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

Supported Languages

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

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

Supported Paths to this Release

You can upgrade to Oracle Smart View for Office Release 21.100 from the following releases:

Table 1-1 Supported Paths to this Release

Release Upgrade Path From	To
11.1.2.5.xxx	21.100
20.xxx	21.100

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](#)
- [Essbase, Oracle Analytics Cloud - Essbase](#)
- [Financial Management](#)
- [Narrative Reporting](#)
- [Oracle Hyperion Planning](#)
- [Oracle BI EE, Oracle Analytics Cloud](#)
- [Profitability and Cost Management](#)

About Defects Fixed in This Release

The topics in this section include defects fixed in Release 21.100. 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

31449609 -- The `smartview.bas` file, located by default in `C:\Oracle\SmartView\bin`, now includes the Smart View release number in the copyright section at the beginning of the file.

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

- 30699944 -- Selecting a duplicate alias name with the drop-down member selector in row dimensions no longer results in a "Member out of place" error. To support duplicate alias names in the drop-down member selector, you must be using EPM Cloud 21.05 and the upcoming Oracle Smart View for Office 21.100 (or later) release.
- 32367725 -- If cell-level security has resulted in a cell containing `#NoAccess` for a user, and the Smart View user selects that cell, then right-click menu commands and floating toolbar commands will not be enabled. For example, if the selected cell contains `#NoAccess`, then cell-level commands such as Supporting Detail, Attachments, Cell History, or Cell Comments will not be enabled in the right-click menu or floating toolbar. However, ribbon commands cannot be disabled for a selected `#NoAccess` cell. Instead, a message is displayed noting that the user does not have permission to perform the action in the selected cell.
- 32608446, 32664324 -- When the application setting, Smart View Ad Hoc Behavior, is set to Standard, and a Zoom In, Keep Only, or other ad hoc operation is performed in Smart View, a message is no longer displayed, and formulas are retained for both the cell or cells selected for the ad hoc operation and for other member cells on the sheet. Note that the formula positions will remain the same as formula position adjustment is not yet supported in Standard mode. Any adjustments needed for formulas after the ad hoc operation must be done manually.
- 32633340 -- The Strategic Modeling POV dropdown menus now display properly when using more than one display.

- 32716643 -- Flex forms can now be refreshed as expected when there are formulas placed outside of the grid that reference members within the grid.
- 32736400 -- For consistency with the interface in EPM Cloud, the **Attachments** dialog in Smart View now limits the attachment file type to a fixed set of supported file extensions. For information on using the attachments feature, see [Attachments](#) in the *Working with Oracle Smart View for Office*.
- 32781322 -- When the Segment property, "Enable drop-down for dimensions," is enabled on a form, any Smart Lists present on the form now work properly.
- 32875325 -- In Smart View, fixed inconsistent alignment of merged cells which occurs in some Planning forms.
- 32929992 -- After enabling single-signon, script errors occurred when signing in to Smart View. These errors can be resolved by implementing Microsoft Edge WebView2 Runtime. For more information, see these topics in this readme:
 - [Support for Microsoft Edge WebView2](#) in New Features in Release 21.100
 - [Microsoft Edge WebView2 Support](#) in Supported Platforms, Browser Support
- 32940179 -- There is no longer a lag time after entering or modifying data in forms with spreading enabled. You can enter a value, the value spreads appropriately, no lag time occurs, and you can immediately enter other values.

Essbase, Oracle Analytics Cloud - Essbase

- 32598137 -- Oracle Essbase grid saved in old format (pre 11.1.2.x.xxx format) refreshes properly as it will be internally migrated to new format.
- 32836818 -- The Repeat Member Labels option is now being honored while performing an Analyze from a Smart Query sheet.

Financial Management

- 31385224 -- In Oracle Smart View for Office, in a web data entry form, you can now add a member as expected when the first data cell in the form is blank. As a best practice, before adding members, be sure to remove any members from the right side of the Member Selection dialog, and then select the members to add.
- 32924309 -- When opening a Oracle Hyperion Financial Management web form in Smart View that contains a cell text, you no longer get a **#NoAccess** message.

Narrative Reporting

Related Topics

[21.08 Narrative Reporting](#)

21.08 Narrative Reporting

These issues are fixed in Narrative Reporting 21.08 and do not require an update to the Narrative Reporting extension for Smart View:

33010116, 32940982, 33020772 -- When importing a multiple-grid report into Excel, grid cell formatting is now retained.

Regarding defect 33010116 and column width behavior in multiple-grid reports specifically, see [Differences between Reports and Reports Imported in Excel](#) in *Designing with Reports for Oracle Enterprise Performance Management Cloud*.

Oracle Hyperion Planning

32736400 -- For consistency with the interface in Oracle Hyperion Planning, the **Attachments** dialog in Oracle Smart View for Office now limits the attachment file type to a fixed set of supported file extensions. For information on using the attachments feature, see [Attachments](#) in the *Oracle Smart View for Office User's Guide*.

Oracle BI EE, Oracle Analytics Cloud

31844307 -- You can now successfully copy and paste a chart or chart image within Excel (for example, from Sheet 1 to Sheet 2) or from Excel to PowerPoint.

Profitability and Cost Management

32894337 -- An error occurred when connecting to Profitability and Cost Management from Oracle Smart View for Office. The error is resolved by implementing Microsoft Edge WebView2 Runtime. For more information, see [Support for Microsoft Edge WebView2](#) in "New Features," and [Microsoft Edge WebView2 Support](#) in "Supported Platforms."

Known Issues

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.

Extensions

32847050 -- In the Mozilla Firefox browser, downloading an Oracle Smart View for Office extension (such as the Account Reconciliation or Narrative Reporting extension) may result in a new tab opening with a large amount of code being displayed. This is due to a security policy within the Firefox browser related to certain file extensions.

Workaround: Download the Smart View extensions using an alternate supported browser (Microsoft Edge or Google Chrome). Or, you can install the extension from within Smart View directly.

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
- Planning Modules, including Strategic Modeling
- 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.
- 31990195 -- In Smart View, while working with a form that has an Excel filter applied to a column containing dates, users were unable to refresh or submit data. This occurs when selecting Date filters using the check boxes. Instead, you should select a filter from the extended right-click menu or create a custom filter.

This issue may be fixed in a future version of Microsoft Office. Until then, Oracle recommends that you do not use check boxes to apply filters to columns containing dates. If you use check boxes to apply filters to a column containing dates, Smart View will remove the filter upon refreshing or submitting data, so that the operation can proceed as expected.

Note that when using check boxes to apply Excel filters to other columns which do not contain dates, users can refresh or submit data as expected.

- 32893875 -- In flex forms, when changing a user variable in the POV, the following error is observed: Index 0 Size 0.

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

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 21.100 guides are available in the library on the Oracle Help Center:

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

Documentation 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 12.0.3
- Office PIA 14.0
- InstallShield 2019
- Open XML SDK 2.12.1
- Zlib Data Compression Library 1.2.11

Oracle Smart View for Office Readme

F42084-05

Copyright © 2021, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or "commercial computer software documentation" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

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