

## Smart View 24.100 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 24.100

#### Related Topics

- [Access Various Actions Faster with the New Quick Action Menu](#)
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## Access Various Actions Faster with the New Quick Action Menu

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

A new **Quick Action** menu is now available on the **Smart View** ribbon. This menu enables you to access various actions quickly, instead of switching between ribbons often or launching the Smart View Options dialog every time to change a setting.

The **Quick Action** menu contains a list of actions that include:

- commonly used menu items on the Smart View, provider, and provider ad hoc ribbons such as Submit Data, Refresh, Zoom In, Change Alias, and so on.
- settings from the Smart View Options dialog such as Suppress Missing Rows, Suppress Repeated Members, Use Excel Formatting, and so on. The status of a setting, whether selected (On) or unselected (Off) is also indicated next to the action.

You can enable and disable the Quick Action menu as per your requirement. In the **Health Check** dialog, the **Quick Action** setting is present under **Smart View Options** and is disabled by default.

- To enable it, click in the **Fix/Update/Help Link** column, select **Enable**, and then click **Update Settings**.
- To disable it, click in the **Fix/Update/Help Link** column, select **Disable**, and then click **Update Settings**.

The list of actions that appear in the **Quick Action** menu vary based on what is open in context. For example:

- If no form or ad hoc grid is open, then you get basic actions such as Diagnostics or settings from Smart View Options.
- If a form is open, then you get form-related actions such as Submit Data, Adjust, or Business Rules in the Quick Action menu.
- If an ad hoc grid is open, you get ad hoc operations such as Zoom In, Zoom Out, or Remove Only in the Quick Action menu.

You can customize the list of actions that appear in the Quick Action menu. To customize the actions list, expand the **Quick Action** menu and select **More....** In the

**Quick Item Selection** dialog, the Available Actions section shows the actions that can be added to the Quick Action menu. The Selected Actions section shows the actions that you have selected to display in the Quick Actions menu.

- To add an action, select and move it from Available Actions to Selected Actions.
- To remove an action, select and move it back from Selected Actions to Available Actions.
- To arrange the order in you want the actions to display in the Quick Actions menu, use the Up and Down arrows in Selected Actions.

Once set, the quick actions are available for all forms and ad hoc grids that you open from a data provider.

 **Note:**

- The next time you want to customize the actions list, you may not get the **More...** option in the **Quick Action** menu. You need to open a new sheet tab, and then expand the **Quick Action** menu to select **More...** and open the **Quick Item Selection** dialog for adding or removing actions.
- After closing the **Quick Item Selection** dialog, if you select the **More...** option again, the **Quick Item Selection** dialog does not open. This is because, until the selection is not changed, the **Quick Action** menu will not initiate the same action again. As a workaround, select a different option from the **Quick Action** menu and then select **More...** again to open the **Quick Item Selection** dialog.

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

- [Using Quick Actions](#)
- [Performing a Health Check On Your System](#)

## Open Flex Forms as Flex Forms from Search Results

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

You can now open flex forms as flex forms directly from the search results in the Oracle Smart View for Office Home panel.

Previously in search results, flex forms were indicated using the simple form icon and could only be opened as a simple form.

Flex forms now appear with the correct icon when searched using the search box in the Smart View Home panel. You can now open a flex form as a simple form and as a flex form directly from the search results.

To open a flex form from the search results, use any of the following ways:

- Select the flex form and click the **Open flex form** link in the Action panel.
- Right-click the flex form and click **Open flex form**.

For more information, see [Searching for Forms and Other Artifacts](#) in the *Oracle Smart View for Office User's Guide*.

## Support for Localized Artifact Labels in Smart View

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

The localized labels and descriptions set for artifacts such as cubes, forms, folders, task lists, and so on, in the web application are now supported and displayed in Oracle Smart View for Office.

Artifacts labels include various properties such as name, description, or instructions that can be customized and set in different languages that users work in to provide them with meaningful information. For example, the artifact label of a form named "turnover" in English can be set to "chiffre d'affaires" for French language users.

For each artifact, you can add artifact labels in different languages in the Oracle Enterprise Performance Management Cloud web application. If no artifact label is defined for an artifact, then the default label is displayed. For more information, see [Adding Languages and Defining Localized Artifact Labels](#).

 **Note:**

Viewing artifact labels in Smart View requires EPM Cloud update 24.04 or later.

The artifact labels supported in the web application are listed in [Which Artifact Labels Can be Localized?](#) In Smart View, artifact labels are supported for the following artifacts:

- Business Rules
- Cubes
- Dashboards
- Documents
- Folders
- Forms
- Prompts
- Reports
- Smart Lists
- Tasks and Task Lists
- Templates

- User Variables

Once added, you can see the localized artifact labels in multiple places within Smart View, such as the tree view in Smart View Home panel, the POV toolbar and POV Manager, the Sheet Information dialog, the list of search results, the right-click menus and menu items, and the Recently Used list.

The localized artifact labels in Smart View are displayed based on the language set in the **Advanced** tab of Smart View **Options**.

 **Note:**

Users working in different languages on a saved workbook may see artifact labels for Smart List values in a different language than what is selected in their Smart View language settings. For example, a user saves a form with Smart List artifact labels in Spanish in a workbook. If this saved workbook is opened by another user who has set the Smart View language as English, the user will continue to see the Smart list values in Spanish, instead of English. This happens because when a workbook containing forms or ad hoc grids with Smart Lists is saved, the list is not updated unless it has been updated or modified in the server. In such cases, users must open such forms or ad hoc grids in a new workbook to see the Smart List artifact labels in their selected language.

For more information, see [Viewing Localized Artifact Labels](#) in the *Oracle Smart View for Office User's Guide*.

## View Prompt Labels while Selecting Prompts in Reports

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

When importing or inserting reports with prompts in Oracle Smart View for Office, the prompts listed in the **Select Prompts** dialog in Smart View are now categorized under prompt labels for clear differentiation.

Prompt labels are defined while designing reports. Report designers give meaningful labels such as "Select a reporting region" or "Select a quarter" so that users can understand and select the prompts correctly. While importing or inserting a report in Smart View, if the report contains prompts, then the **Select Prompts** dialog lists the available prompts and users can select the required ones before importing or inserting the report.

The prompts are now categorized and displayed under prompt labels instead of dimension names in the **Select Prompts** dialog. This becomes helpful, especially when prompts belong to the same dimension. In such cases, prompt labels enable users to distinguish between the prompts easily.

For more information, see:

- [Importing or Inserting and Working with Fully Formatted Reports](#) in *Oracle Smart View for Office User's Guide*
- [Designing with Reports for Oracle Enterprise Performance Management Cloud](#)
- [Working with Reports for Oracle Enterprise Performance Management Cloud](#)

## Improved Behavior of User Preferences Dialog

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

The **User Preferences** dialog no longer closes abruptly after clicking **OK** in any error message.

In the **User Variables** tab of the **User Preferences** dialog, you can change the selected member for a user variable by typing in the field or launching the **Member Selection** dialog. Previously, on clicking **OK** in the dialog, if any error message appeared and you clicked **OK** in the error message, the **User Preferences** dialog would close abruptly, without letting you do any more changes in the **User Variables** tab or in other tabs. You had to open the **User Preferences** dialog again to continue with more changes.

Now, the **User Preferences** dialog remains open after you click **OK** to close the error message, thus allowing you to proceed with further changes to the preferences.

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

## Support for Indentation of Column Headers with Totals

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

When working in ad hoc grids, you can now set indentation for totals in column headers, in addition to totals in row headers.

Previously, only the row headers would get indented to ancestors or descendants based on the indentation set in Smart View Options. Now, even the column headers with totals are indented, such that the ancestors and descendants are aligned at the top, middle, or bottom levels based on the indentation setting.

For example, the column headers contain totals for months (Jan, Feb, Mar, ...), quarters (Q1, Q2, Q3, Q4), and years (2022, 2023).

- If the indentation is set to **Totals**, then the ancestors are indented. So in the column headers, the months appear aligned to the top, the quarters are centered or aligned to the middle, and the years are aligned to the bottom.
- If the indentation is set to **Subitems**, then the descendants are indented. So in the column headers, the months appear aligned to the bottom, the quarters are centered or aligned to the middle, and the years are aligned to the top.

To set indentation, open the **Smart View Options** dialog, click the **Member Options** tab, and under **General**, select either the **Subitems** or the **Totals** option in the **Indentation** drop-down list. For column headers indentation in ad hoc standard mode,

the **Use Excel Indentation (Ad Hoc Standard Mode)** check box also needs to be selected.

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

## View Distinct Page Member Names in Pages for Forms

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

A new option **Show Distinct Page Member Names** is introduced to display distinct page member names or fully qualified names in the Page list for forms. By displaying distinct member names instead of descriptions, you can now recognize shared members correctly and avoid confusion with similar descriptions.

Previously, the Page list used to highlight the first occurrence of a shared member, instead of the showing the actual selected member. For example, "North Sales" is a shared member that appears under "International Sales" as well as "Regional Sales", and "International Sales" appears first in the Page list. If "North Sales" under "Regional Sales" is selected, the form showed the values for this selection correctly, but on opening the Page list, it would highlight or point to "North Sales" under "International Sales" since it appeared first in the list. This happened due to the similarity in descriptions of both members.

To resolve this confusion and help you identify the selected member correctly in the Page list, a new option **Show Distinct Page Member Names** is now provided for forms. When this option is selected, you can view the original or distinct page member names in the Page list, instead of duplicate descriptions. For example, for the shared member "North Sales", the Page list now displays the fully qualified name "[International Sales] . [North Sales]" and "[Regional Sales] . [North Sales]".

This option is disabled by default. To enable this option, in the **Smart View Options** dialog, click the **Formatting** tab. Under **Form**, select the **Show Distinct Page Member Names** check box. Refresh the sheet and expand the Page list to view the distinct page member names.

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

- [Formatting Options](#)
- [Viewing Distinct Page Member Names in Pages for Forms](#)

## Verify Registration Status of DLLs in Health Check

In the **Health Check** dialog, you can now verify if the DLLs required for various Smart View operations have been correctly registered or not after installing Oracle Smart View for Office.

Smart View uses Dynamic Link Library files (DLLs) to implement certain functionalities. These files are automatically registered while installing Smart View. The **Health Check**

dialog now provides information on the release version and registration status of the following DLLs under the **Version Information** section:

- **BIPlusConnector.dll**: This is used to manage functionalities such as extensions, reports, search, cell actions, and drill-through in new sheet.
- **Profiler.dll**: This is used to manage diagnostics.
- **HsSpread.dll**: This is used to manage the spreading functionality.
- **SVAPPH.dll**: This is used to manage Web launch from Smart View.

After installing Smart View, it is a good practice to open the **Health Check** dialog to verify the registration status of the DLLs.

- If a DLL is registered correctly, the status appears as "Registered". For example, 24.100 / Registered.
- If a DLL is not registered correctly, the status appears as "Not Registered" and the functionalities it manages may not work properly. In such cases, you must re-install Smart View using administrator privileges. This instruction is also displayed in the **Fix/Update/Help Link** column.

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

## Microsoft Edge WebView2 Now Enabled by Default

Starting in 24.100, Microsoft Edge WebView2 is enabled by default in Oracle Smart View for Office.

Smart View uses Microsoft Edge WebView2 to display the user interface login pages and facilitate networking. Previously, it was set to **Disable** by default. Users could enable it from the **Health Check** dialog by selecting either **Enable for UI** or **Enable for All** in the **WebView2 Runtime** field.

Now, the **Enable for All** value is selected by default for **WebView2 Runtime**. Users can change it as per their requirement. However, it is recommended to keep it enabled with the **Enable for All** value.

As a reference for users, **WebView2 Runtime** along with its recommended value **Enable for All** is added in the **Recommended Settings** list. In the **Health Check** dialog, click the **Recommended Settings** button to view and apply the recommended values for all options.

For more information on setting options in the **Health Check** dialog, see [Performing a Health Check On Your System](#) in the *Oracle Smart View for Office User's Guide*.

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

## Retain Smart List on Clearing Cell Value Using the Delete Key

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

While working on Smart Lists in forms and ad hoc grids, if you press the **Delete** key in a Smart List cell, then the cell value is cleared but the Smart List is retained in the cell.

Previously, on pressing the **Delete** key in a Smart list cell, all the values in the Smart List would get removed. Clicking the down arrow on such a cell would show an empty list with ellipses. It could be brought back only after refreshing the sheet. Now, you can click the down arrow in the Smart List cell again to view all its values and select the required value from the drop-down list.

 **Note:**

If you are working on an ad hoc sheet in free-form state, then the Smart List values are not retained on pressing the **Delete** key. As a workaround, you have to refresh the sheet to get the Smart List values back in the drop-down list.

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

## Specify the Maximum Number of Cells Displayed in Data Validation Pane

To improve performance when opening forms containing data validation rules, administrators can use the registry flag, `NumberOfValidations`, to specify the maximum number of error cells displayed in the **Data Validation** pane.

 **Note:**

The default maximum number of data validation error cells displayed is 200. Be aware that setting the flag higher than 200 can affect performance.

Add the flag to `HKCU\Software\Hyperion Solutions\HyperionSmartView\Options`.

And use these values:

**Name:** `NumberOfValidations`

**Value:** 200—The default maximum number of cells returned in the **Data Validation** pane. You can set the number higher or lower, as you require, but note that a higher number can affect performance.

**Type:** `REG_DWORD`

Administrators should determine the number of data validation error cells to display. Then use your institution's procedures to distribute this registry setting to your users. The default is to display 200 data validation error cells.

For more information, see [Specifying the Maximum Number of Cells Displayed in Data Validation Pane](#) in the *Oracle Smart View for Office User's Guide*.

## EPM Books Features and Updates

### Related Topics

- [EPM Books 24.09 Extension Update](#)
- [EPM Books 24.06 Extension Update](#)
- [EPM Books 24.04 Extension Update](#)

### EPM Books 24.09 Extension Update

An updated EPM Books extension for Oracle Smart View for Office is now available to download and install. This update includes general improvements and defect fixes.

To take advantage of the improvements and defect fixes in the EPM Books extension:

1. From within Smart View, in the **Options** dialog, **Extensions** tab, click the **Check for Updates, New Installs, and Uninstalls** link.
2. Select your business process instance, then follow the prompts.

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

- [Installing the EPM Books Extension](#)
- [Books](#)

### EPM Books 24.06 Extension Update

An updated EPM Books extension for Oracle Smart View for Office is now available to download and install. This update includes general improvements and defect fixes.

Downloading and installing the latest version of the EPM Books extension gives you access to the latest features, improvements, and defect fixes.

### EPM Books 24.04 Extension Update

An updated EPM Books extension for Oracle Smart View for Office is now available to download and install. This update includes general improvements and defect fixes.

Downloading and installing the latest version of the EPM Books extension gives you access to the latest features, improvements, and defect fixes.

## Narrative Reporting Features and Updates

### Related Topics

- [New Search Field in Embed Contents Dialog](#)
- [Narrative Reporting 24.06 Extension Update](#)
- [Narrative Reporting 24.04 Extension Update](#)

### New Search Field in Embed Contents Dialog

When working with Narrative Reporting in Oracle Smart View for Office, a new Search field in the **Embed Contents** dialog facilitates in locating content when the list of available content is long.

To use the new Search field, open a report package, open and check out a doclet, and click the **Embed** button in the Narrative Reporting ribbon to launch the **Embed Contents** dialog.

Enter a term to search on; for example, enter `sum`. There is no need to enter wildcards; Narrative Reporting searches for and returns all available content that contains "sum" anywhere in the content name.

You can refine the entire list of available content or the search results by selecting an option from the Filter drop-down list next to the Search field. The default selection is **All**, to show all available content. You can choose **Current Doclet**, to display only available content in the current doclet; or **Reference Doclets**, to display available content from all reference doclets in the report package. You can also choose **Hide Embedded**, to hide available content that has already been embedded in the current doclet.

Optionally, click the **X** icon in the Search field to clear the search term and return the list of available content to the original state.

Once you've located the available content to embed, you can use the **Show Preview** button to preview the content, click **Embed** to embed the content in your doclet, or click **Cancel** to leave the dialog.

Use the new Search field in the **Embed Contents** dialog to quickly locate available content.

This feature requires the 24.06 Narrative Reporting extension. To install the extension, see [Narrative Reporting 24.06 Extension Update](#).

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

- [Installing the Narrative Reporting Extension](#)
- [Embedding Content in a Doclet](#)
- [Adding and Embedding Available Content from Reference Files](#)
- [Smart View and Narrative Reporting](#)

## Narrative Reporting 24.06 Extension Update

An updated Narrative Reporting extension for Oracle Smart View for Office is now available to download and install. Along with general improvements and defect fixes, this update includes support for the Narrative Reporting feature, <<XREF>>.

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

For more information, see:

- [Downloading and Installing Clients](#) in *Oracle Enterprise Performance Management Cloud Getting Started with Oracle Enterprise Performance Management Cloud for Administrators*
- [Downloading and Installing Clients](#) in *Oracle Enterprise Performance Management Cloud Getting Started with Oracle Enterprise Performance Management Cloud for Users*
- *Oracle Smart View for Office User's Guide:*
  - [Installing the Narrative Reporting Extension](#)
  - [Smart View and Narrative Reporting](#)

## Narrative Reporting 24.04 Extension Update

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

Downloading and installing the latest Narrative Reporting extension for Smart View gives you access to the latest features, improvements and defect 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/epmos/faces/DocumentDisplay?id=1923582.1>

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

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

Google Chrome, Mozilla Firefox, and Microsoft Edge require a browser extension. See the topics in [Browser Support](#) for information on downloading and installing the Smart View extension for those browsers.

## Supported Platforms

### Related Topics

- [Smart View Version Support](#)

- [Microsoft Windows Operating System and .NET Support](#)
- [Microsoft Office Support](#)
- [Browser Support](#)
- [Smart View and Virtualized Environments](#)
- [Mobile Device Support](#)

## Smart View Version Support

Oracle supports and certifies the current release and one release prior (24.100 and 23.200) of Oracle Smart View for Office against current products on Premier Support.

## Microsoft Windows Operating System and .NET Support

Oracle Smart View for Office 24.100 is supported on Windows 10 and Windows 11, and requires a supported version of Microsoft .NET Framework. Oracle recommends using .NET Framework 4.8 or higher.

Note that Microsoft .NET Framework 4.5.2, 4.6, and 4.6.1 are no longer supported after April 26, 2022. For more information, see [.NET Framework 4.5.2, 4.6, 4.6.1 will reach End of Support on April 26, 2022](#).

For information on additional Windows operating system support, see the matrix for your release in [Supported Platforms Matrices](#).

## Microsoft Office Support

### Related Topics

- [Microsoft Office 2016, 2019, and 2021](#)
- [Microsoft Office 365](#)

### Microsoft Office 2016, 2019, and 2021

Oracle Smart View for Office supports Microsoft Office 2016, 2019, and 2021.

### 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>

 **Note:**

Users upgrading to the latest Office 365 Beta Channel or Current Channel versions may face issues using drop-down lists in Smart List, member drop-down, in-cell POV, and other such drop-down lists. For example, on clicking any drop-down lists in cells, only ellipses (...) may be displayed instead of the actual drop-down values. You will need to upgrade to Smart View 22.200 or later in order to see the drop-down values in cells properly.

## Browser Support

### Related Topics

- [Browser Add-ons](#)
- [Updated Smart View Browser Extension Required for Chrome and Edge](#)
- [Browser Version Support](#)
- [Microsoft Edge WebView2 Support](#)

### Browser Add-ons

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

- Starting in a form or ad hoc grid in Smart View, use drill-through to launch an application web page in a browser.
- Starting in a web application, launch a form or ad hoc grid in Smart View for Excel.
- Starting in a Task List in Smart View, opening a task in a browser.

Mozilla Firefox, Google Chrome, and Microsoft Edge require a Smart View add-on for drill-through, web launch, and opening a task in a browser from Smart View.

 **Note:**

Starting with the EPM Cloud 20.09 update and EPM System 11.2.2 release, Internet Explorer 11 is no longer supported, based on the Microsoft recommendation that Internet Explorer users move to the new Microsoft Edge as their default browser. Because Oracle will no longer test 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. For more information, see [Browser Version Support](#).

Oracle recommends that all users move to a supported browser.

Browser extension installation instructions are in the *Oracle Smart View for Office Installation and Configuration Guide*, [Installing Browser Add-ons](#). This guide is available in the Smart View library on the Oracle Help Center here:

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

## Updated Smart View Browser Extension Required for Chrome and Edge

An updated browser extension for Google Chrome and Microsoft Edge was made available in November, 2022. This extension is required for Oracle Smart View for Office to interact with supported browser-based EPM Cloud business process and EPM System applications in the following ways:

- Starting in a form or ad hoc grid in Smart View, use drill-through to launch an application web page in a browser.
- Starting in a web application, launch a form or ad hoc grid in Smart View for Excel.
- Starting in a Task List in Smart View, opening a task in a browser.

### Note:

This required browser extension update is strictly for the Chrome and Edge browsers only. This is not an update for extensions, such as the Planning Admin or Narrative Reporting extensions, within Smart View.

This update is required only if your default browser is Chrome or Edge. If your default browser is Mozilla Firefox, then this update does not affect you.

The extension is available in the Chrome Web Store from either the Chrome or Edge browser. In the Chrome Web Store, search for "smart view" to locate the extension update. The updated version number is 22.200. Then follow the instructions for Google Chrome or Microsoft Edge in [Installing Browser Add-ons](#) in the *Oracle Smart View for Office Installation and Configuration Guide*.

Note that as of January 1, 2023, the previous browser extension no longer works with Chrome or Edge. You must update your extension in order to continue interactions between Smart View and browser-based applications in EPM Cloud and EPM System.

## Browser Version Support

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

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

 **Note:**

Do not uninstall Microsoft Internet Explorer, even after the end-of support date of June 15, 2022. Instead, you may securely disable Internet Explorer following Microsoft's guidelines. In situations where the Internet Explorer browser would be called, the Edge browser will be launched instead.

Smart View does not require the Internet Explorer browser specifically. However, Smart View depends on WinInet APIs that may have dependencies on Internet Explorer. Microsoft recommends keeping Internet Explorer installed on the machine since uninstalling may cause other applications that are dependent on it to work incorrectly. Microsoft also recommends updating to the latest security patches as they become available.

For more information, see Oracle Support Document 2877741.1, [Impact on Smart View with Microsoft decommissioning Internet Explorer 11 on June 15, 2022](#).

## Microsoft Edge WebView2 Support

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

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

 **Note:**

- Smart View began supporting WebView2 in release 21.100. Full support for WebView2 is available in release 23.210 and later.
- WebView2 is supported only on Microsoft Windows 10 and 11.
- Although WebView2 is supported only on Windows 10 and 11, there may be instances where you are working with Smart View on a Windows Server version, such as Windows Server 2022, with WebView2 installed and enabled. In these cases, after initial login to an Office application, such as Excel, if you attempt to use Smart View in another Office application, you will be required to log in again. For example, if you are copying and pasting data points from Excel to Word, you will be required to log in to Excel, and then log in again to Word. This is due to Office applications not sharing the WebView2 data folder. Any functionality that relies on the shared data folder will not work as expected. The result is that users will need to log in and disconnect independently for each Office application on Windows Server.
- In the **Health Check** dialog in Smart View, the **WebView2 Runtime** option is set to **Enable for All** by default.
- For two-factor authentication login scenarios, in the **Health Check** dialog, the **WebView2 Runtime** option must be set to **Enable for UI** or **Enable for All**.

Once WebView2 is installed on Smart View client machines, users can enable or disable it in the **Smart View Options** section of the **Health Check** dialog (described in [Performing a Health Check On Your System](#) in the *Oracle Smart View for Office User's Guide*).

Administrators can also enable or disable WebView2 by editing the Smart View `properties.xml` file (present by default in `C:\Oracle\SmartView\cfg`) and then distribute this file to users.

These are the configuration settings for enabling and disabling WebView2 in `properties.xml`:

- **Enable for All** (the default setting):  

```
<disableWebView2>0</disableWebView2>  
  
<useWebView2forNetworking>1</useWebView2forNetworking>
```
- **Enable for UI:**  

```
<disableWebView2>0</disableWebView2>  
  
<useWebView2forNetworking>0</useWebView2forNetworking>
```
- **Disable:**  

```
<disableWebView2>1</disableWebView2>  
  
<useWebView2forNetworking>0</useWebView2forNetworking>
```

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

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

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

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

## 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

Language	Language	Language	Language
English	Hungarian	Portuguese (Portugal)	Turkish

## Supported Paths to this Release

You can upgrade to Oracle Smart View for Office Release 24.100 from the following releases:

**Table 1-1 Supported Paths to this Release**

Release Upgrade Path From	To
23.200	24.100
23.210	24.100

## 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

- [General](#)
- [EPM Cloud](#)
- [EPM Books](#)
- [Financial Management](#)
- [Financial Reporting](#)
- [Oracle BI EE](#)

### General

- 34676161 – If WebView2 fails to initialize, Smart View switches to Internet Explorer (IE) browser component to process the login sequence. Usually, this does not affect users. However, if two-factor or other complex authentication that IE does not support is used, then users need to restart Excel to initialize WebView2 again. In such cases, users can save their work and restart Excel. A new warning

message now guides the users stating that "WebView2 Runtime failed, switching to IE browser component. Save your work and restart the application if you still have connectivity issues."

- 35880037 – Enabling WebView2 no longer results in being prompted for authentication through a third party, such as a Google login.

 **Note:**

Administrators: If you are using WebView2, and Disconnect All is not working or Excel is failing during a Disconnect All, try disabling the registry flag, PreserveThirdPartyCookies. Note that disabling PreserveThirdPartyCookies may cause users to again be prompted for authentication through a third party, such as Google. See [WebView2 and Disconnect Issues](#) in the *Oracle Smart View for Office Installation and Configuration Guide* for more information.

- 35819460 – The Smart View ribbon displays correctly after Smart View is installed or upgraded as Admin, but run as a Standard user.

 **Note:**

Administrators: For new installations, the **Disable Smart View in Outlook** check box is selected by default. In the Windows Registry, HKCU\Software\Hyperion Solutions\HyperionSmartView\Preferences\OutlookDisabled is set to non-zero (usually 1).

For upgrades, if the OutlookDisabled value in the Registry is set to zero, the Smart View ribbon will still display for the Standard user and the OutlookDisabled value remains set to zero.

For information on setting the registry value for OutlookDisabled, see [Outlook Enablement in New Installs and Upgrades](#).

EPM Cloud

 **Note:**

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

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

These EPM Cloud-related issues are fixed in this release:

- 35879397 - Validation error messages for Groovy rules are now displayed correctly for regular non-admin users.
- 35976672 - If the **Show invalid members for flex form** check box is selected and users enter a correct member in place of an invalid member highlighted in a row, on refreshing the form, any numeric members present in the row are retained and no longer disappear.
- 36038311, 36152443 - In an ad hoc sheet, cell comments can be added and saved successfully in cells with members containing these special characters:
  - | – Pipe
  - ^ – Caret
  - > – Greater than
  - < – Less than
  - ' – Apostrophe
  - & – Ampersand
- 36105917 – Forms with a large number of data validation cells now open within a reasonable time in Oracle Smart View for Office.

 **Note:**

Administrators can control the number of data validation error cells that are returned in the **Data Validation** pane. See [Specify the Maximum Number of Cells Displayed in Data Validation Pane](#) for more information.

- 36241623 – The form **Instructions** dialog now launches correctly and no longer causes Excel to fail or an erroneous message to display (Argument FolderName in the Request is an empty string or NULL:Try to connect again).
- 36383989 - Smart Lists can now be updated and submitted through a Free-Form grid using the Submit Data Without Refresh option.

- 36374535 - There are no longer performance issues and delays while copying and pasting data containing Smart Lists from an external source and submitting it from Smart View using the Submit Data Without Refresh option.
- 36381944 - #Missing is no longer displayed in a form that has a Smart List with one member and the other member is an alias for #Missing.
- 36073086 - Strategic Modeling node is no longer seen in the Smart View Home panel for applications in which Strategic Modeling is disabled.

## EPM Books

36713839 – When the **Preview POV** option is enabled in **User Preferences** in the web business process, users will now be able to execute a book with no POVs without any error. This fix requires the EPM Books extension update 24.09 or later.

## Financial Management

36074963 - Using the **Refresh All Worksheets** option for HsGetText no longer results in #Needs Refresh error in the cell and full text is displayed even if the text contains a Pipe "|" character.

## Financial Reporting

35390835 – Financial Reporting reports open without issue with these Health Check settings: any **WebView2 Runtime** setting (**Enable for All**, **Enable for UI**, or **Disable**); and **Browser Emulation Mode** set to 11001.

## Oracle BI EE

36056062 – When working with the Oracle BI EE extension and inserting pivot table views, dates are displayed correctly according to the Windows Region setting. For example, when set to United Kingdom, dates display in the dd/mm format; when set to the United States, dates display in the mm/dd format.

## Known Issues

### Related Topics

- [General](#)
- [EPM Cloud](#)
- [Financial Management](#)

## General

- 33992974 – When working in a two-monitor scenario using a laptop screen and an external monitor screen in extended mode, Oracle Smart View for Office may not be able to recognize selections in the POV. This is due to having different resolution

and scaling settings on each screen, which can result in false clicks where some UI clicks are not captured.

**Workaround:** If your display resolution settings are different between the laptop monitor and the external monitor with extended display, use the same scale settings on both screens. For information on monitor display settings, see the Microsoft article, [How to use multiple monitors in Windows](#).

- 34032813 – After installing Smart View as a System user, when Excel is launched for the first time, the registry key HKEY\_CURRENT\_USER, or HKCU is updated with the location of the HsTbar.xla file. While uninstalling Smart View, the HKCU entries are not removed automatically. After uninstalling Smart View, when Excel is launched for the first time, Excel tries to locate the HsTbar.xla file and shows an error stating it could not find the file.

**Workaround:** To avoid this error, delete the entries from the Windows Registry manually using the steps given in [Excel Looks for HsTbar.xla File After Uninstall](#) in the *Oracle Smart View for Office Installation and Administration Guide*.

- 34045185 – When connected to on-premises data sources, launching a drill-through report causes Smart View to crash. This happens when Chrome is the default browser.

**Workarounds:**

- Start Chrome before launching the drill-through report.
- If you experience the crash, reload the Smart View extension for Chrome:
  1. Click on the balloon at the bottom right of the browser window to reload the extension.
  2. Click the **Reload this page** button at the top left of the browser (on the left of the address bar).
- Choose Firefox or Edge as your default browser.
- 34344067 – When attempting to launch certain dialogs, the **Script Error** dialog is displayed if WebView2 is disabled; for example, you launch the **Instructions** dialog, and the instructions area is blank and the **Script Error** dialog is displayed.

**Workaround:** In the **Health Check** dialog, ensure that WebView2 Runtime is installed and select **Enable for UI**, described in [Performing a Health Check On Your System](#) in the *Oracle Smart View for Office User's Guide*.
- 35116820 – If the Health Check option, **WebView2 Runtime**, is set to **Enable for UI** or **Enable for All**, then you cannot update extensions using the **Check for Updates, New Installs, and Uninstalls** in the Smart View **Options** dialog.

**Workaround:** In the **Health Check** dialog, set the **WebView2 Runtime** option to **Disable**. Restart Office. Then proceed with the extension update (or install or uninstall) using the **Check for Updates, New Installs, and Uninstalls** link in the **Options** dialog. When you're finished with extension update tasks, reenabling the **WebView2 Runtime** option in the **Health Check** dialog and restart Office.
- 35673178 – If different EPM Cloud instances use different Identity Cloud Services (IDCS) instances, users will be prompted once per IDCS instance. For example, after logging into Narrative Reporting and launching a Planning-based Report, you may be prompted to log in again after clicking **Analyze**.

- 35728359 – When performing drill-through to an Excel sheet, data value amounts on the sheet are shown in US format (with . as the decimal separator) and not in the regional format (with , as the decimal separator).
- 36081385 – In Oracle Smart View for Office 23.100 and earlier, when working with saved workbooks containing dimension sheets, performing a Refresh on a sheet causes expanded dimensions to be reset to their top parent level and properties to display twice on columns.

**Workarounds:**

- To avoid this issue, Oracle recommends moving to Smart View release 23.110 or later.
- If you are not updating Smart View at this time, then perform the following procedure in the saved dimension workbook:
  1. Open the workbook and connect to the provider.
  2. Go to any dimension sheet in the workbook and select any member, then press the **F2** key, then press the **Enter** key, and then click **Refresh**.
  3. Repeat the previous step for all dimension sheets in the workbook, and then save the workbook.
- 35054608 – No keyboard shortcuts are available to select in the Login dialog when WebView2 is enabled.

## EPM Cloud

 **Note:**

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

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

- 33622708 – While saving a Microsoft Office file to the EPM Cloud Library from Oracle Smart View for Office, if the file size is nearly 20 MB, an error appears stating that it exceeds the maximum allowed size limit of 20 MB.
- 34372232 – In ad hoc grids connected to Standard-mode applications, when repeated members are suppressed, the **Preserve Format** option does not preserve any formatting changes done for data cells corresponding to the repeated members. The formatting changes are lost on refreshing the grid.

- 35029572 – When importing metadata for copied content, the POV metadata is not imported in PowerPoint 2019.
- 35480273 – Comments outside the flex form grid area will not be adjusted to match grid layout changes.
- 35673349 – In certain scenarios, the Windows **File Download** dialog erroneously appears. You must click the **Close** button, **X**, in the upper-right corner of the dialog to close it and continue. These are the scenarios where this may occur:
  - When a report is set up where the grid data source of the report is pointing to an environment in a different domain than the one with which you originally logged on, the user performs a member selection from the **Edit POV** dialog, clicks **OK** to download the new report with the updated POV, and multiple authentication prompts appear. In the end, the **File Download** dialog is displayed.
 

Click the **X** in the upper-right corner of the dialog and launch the **Edit POV** dialog again but choose members from the drop-down list instead of the **Member Selection** dialog.
  - A report is opened for an extended period of time in Excel, which has resulted in a session time out. When the user refreshes report, the **File Download** dialog may display.
 

Click the **X** in the upper-right corner of the dialog and retry the refresh.
- 36180640 – With WebView2 and the **Save password** dialog enabled, and using a shared connection to connect to an OCI data source, the **Save password** dialog is not displayed.
 

**Workaround:** Connect to the OCI data source a private connection and save the password when prompted. Disconnect or close Excel. Then, log in using the shared connection.
- 36455971 – When you connect to a Strategic Modeling-enabled application from Smart View, it may happen that you do not see any models.
 

**Workaround:** In such cases, it is recommended to upgrade to Oracle Smart View for Office 24.100. After upgrading Smart View, perform the following steps:

  1. From the Smart View ribbon in Excel, click the arrow next to **Help**, and then select **Health Check**.
  2. In the Health Check dialog, set the **WebView2 Runtime** setting as **Disabled** and click **Update Settings**.
  3. Restart Excel.

## Financial Management

36168404 – An error occurs (Unknown error 0x800A139D) when a member list containing double hyphens (--) in the name is selected from **Member Selection**.

## Tips and Troubleshooting

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

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

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

## Documentation Updates

### Related Topics

- [Accessing EPM Cloud and EPM System Product Documentation](#)
- [Copying and Pasting Code Snippets from PDFs](#)
- [Member Selection when in Member Name and Alias Mode](#)

## 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 **See All** under **Cloud Applications, Fusion Applications Suite**, and then click **Enterprise Performance Management** in the **Enterprise Resource Planning (ERP)** group. On the [Oracle Enterprise Performance Management \(EPM\)](#) page, click the link for your service to view the documentation.

### EPM System

For EPM System documentation on the [Oracle Help Center](#), click **See All** under **On-Premises Applications**. On the [Oracle Applications](#) page, click **Enterprise Performance Management**, and then look for your release on the [Enterprise Performance Management](#) page.

You can also find deployment-related documentation on Oracle Technical Resources (<https://www.oracle.com/technical-resources/>) and on the Oracle Software Delivery Cloud website (<https://edelivery.oracle.com>).

## Copying and Pasting Code Snippets from PDFs

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

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

## Member Selection when in Member Name and Alias Mode

33769352 – While in "Member Name and Alias" mode, after selecting a member using the **Member Selection** dialog, users will need to manually correct or delete the corresponding member or alias in the adjacent column in the sheet to ensure a successful refresh. "Member Name and Alias" mode refers to the **Member Name Display** option being set to **Member Name and Alias**.

## Third-Party Components

This topic lists the open-source and proprietary third-party software components (or portions thereof) that are included with or used by Oracle Smart View for Office:

- MSXML 6.0
- NewtonSoft.Json 13.0.2
- Office PIA 14.0
- InstallShield 2023 R2
- Open XML SDK 2.18.0
- Zlib Data Compression Library 1.2.13

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### Oracle Smart View for Office Readme

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