

# ORACLE® HYPERION SMART VIEW FOR OFFICE

*Release 11.1.2.2.310*

## NEW FEATURES

**ORACLE®**  
ENTERPRISE PERFORMANCE  
MANAGEMENT SYSTEM

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# Features Introduced in Release 11.1.2.2.310

## Subtopics

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## Support for Oracle BI EE

**Note:** You must have Oracle Business Intelligence Enterprise Edition release 11.1.1.7 or later to use the Oracle BI EE-related features in Oracle Hyperion Smart View for Office.

Smart View allows users to connect to Oracle BI EE server and utilize the content created in Oracle Business Intelligence Answers dashboards and analyses. In addition to working with pre-created content, Smart View users can create ad hoc queries in the form of simple views with the View Designer, using Oracle BI EE Presentation Server as the data source. The views created can then be published to the Oracle BI EE Presentation Catalog, where they can be edited further.

Smart View offers Oracle BI EE users a cohesive and consistent experience across all Oracle BI EE content providers.

When connected to an Oracle BI EE data source in Smart View, you can:

- Connect to Oracle BI EE Presentation Server.
- Navigate through the Oracle BI EE Presentation Catalog.
- Import pre-created Oracle Business Intelligence Answers views from Presentation Catalog into Microsoft Excel, PowerPoint, and Word. For example, you can:
  - Insert Oracle Business Intelligence tables, BI pivot tables, and BI graphs into Excel as refreshable, editable objects.
  - Apply Excel formatting to BI data; formats are retained when you refresh.
- Copy Oracle BI EE Dashboard content and paste it into Smart View client documents. The data, metadata, and view layout are copied.
- Create simple views in Excel using Oracle BI EE Presentation Server as the source for metadata and data.
- Interact with content imported into Smart View documents, such as prompt selections.
- Manage the imported content in Smart View; for example, refresh, mask, copy and paste, and document contents.

- Mask Oracle Business Intelligence data from Oracle BI EE objects in Office so that users must log in to view the data. Masked objects can be viewed upon refresh.
- Program using Visual Basic. See [“New VBA Functions to Support Oracle BI EE” on page 3](#) for a list of the new functions.

See “Smart View and Oracle BI EE” in the *Oracle Hyperion Smart View for Office User's Guide* for more information.

## New VBA Functions to Support Oracle BI EE

**Note:** You must have Oracle BI EE release 11.1.1.7 or later to use the Oracle BI EE-related VBA functions in Smart View.

You can use Visual Basic to program your own Oracle BI EE interfaces. New s that support this are:

- **InsertView**—Insert an Oracle BI EE object into Smart View
- **EditPrompts**—Edit the prompts of a view.
- **EditPagePrompts**—Edit the page selections of a view.
- **GetPrompts**—Get prompt values of a view.
- **GetPagePrompts**—Get page selections of a view.
- **DeleteView**—Delete a view in an Office application.
- **DirProperties**—Fetch properties of a directory.
- **InvokeMenu**—Invoke the Oracle BI EE ribbon in Smart View

See the *Oracle Hyperion Smart View for Office Developer's Guide* for descriptions of these new functions.

## Shared Connections Can Be Stored Locally in an XML File

Starting with the 11.1.2.2.310 release, when connecting to Smart View data sources, you can use connection information in an XML file to connect to providers. The XML file is stored locally on individual Smart View client machines. You point to this XML file in the **Shared Connections URL** field of the **Options** dialog box, and then access these connections as you would any other shared connection.

This method is the only way to connect to Oracle BI EE providers using a shared connection; however, Oracle BI EE connections can also be made using private connections.

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**Caution!** The XML file creation and distribution process is an system administration procedure and should be completed by the person who administers Smart View in your environment.

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See “Accessing Shared Connections from an XML File” in the *Oracle Hyperion Smart View for Office User's Guide* for more information.

## New Document Contents Pane

Document Contents is a new task pane in the Smart View Panel that provides a view of the content existing in the current Office document.

Document Contents displays Office objects in a tree format, allowing you to easily see and interact with the content in a workbook, presentation, or document, regardless of the provider or type of content and including content from extensions. Content is displayed based on the document layout on sheets, slides, or pages.

Some operations that were previously available in the Action Panel are now available in Document Contents.

See “Document Contents ” in the *Oracle Hyperion Smart View for Office User's Guide* for an overview of the functionality available. Information is also available in applicable topics throughout the guide.

## HsGetValue Functions Can Be Copied and Pasted

You may now copy cells and ranges of cells containing the HsGetValue function from one Office application and paste them into Excel, Word, or PowerPoint.

Only cells containing the HsGetValue function may be copied and pasted. You may not copy and paste cells containing other functions.

For guidelines and instructions, see “Copying and Pasting HsGetValue Functions” in the *Oracle Hyperion Smart View for Office User's Guide*.

## Support for Shared Connections in Functions

In addition to the improvements made to the Function Builder in the Smart View 11.1.2.2.300 release, shared connections are now supported in functions for these providers:

- Oracle Essbase
- Oracle Hyperion Financial Management
- Oracle Hyperion Planning

**Note:** Oracle Hyperion Enterprise® supports private connections only.

You can use shared connections with the Function Builder wizard or when creating functions manually. If you are creating functions manually, refer to the “Functions” chapter of the *Oracle Hyperion Smart View for Office User's Guide* for complete information on the syntax for both shared and private connections.

## New Reporting Object: Office Table

A new reporting object called “Office Table” can now be imported into Oracle Hyperion Financial Reporting function grids, and into function grids for Essbase and Financial Management Smart Slices.

Office tables can be used with Word only. Office tables display results in native Microsoft Office table format. Office tables look and feel like part of the Word document, but the members and data in the table cells are connected to the Smart View provider. With Office tables, you can work with the Word table formatting and styles to which you are accustomed. When you refresh an Office table, both members and data are refreshed.

Insert a POV object into the report and you can change the POV of the Office table. Refresh the Office table after changing formatting or POV and the new POV is reflected in the results and custom formatting is retained.

You cannot zoom in or out in an Office table object and you cannot perform other ad hoc operations or use free form.

In the *Oracle Hyperion Smart View for Office User's Guide*, see the topics, “Creating Reports with Smart Slices” and “Importing Financial Reporting Documents into Word and PowerPoint” for more information on using Office tables.

## POV Supports 5,000 Members

The POV now supports a maximum of 5,000 members. (13701564)

## Features Introduced in Release 11.1.2.2.300

### Subtopics

- [Enhanced Performance](#)
- [Support for Financial Management Data Grids](#)
- [Support for Essbase Database Notes](#)
- [Cell-Based POV for Essbase](#)
- [Improved Function Builder](#)
- [Fix Links](#)
- [User Variables in Financial Management Data Forms](#)
- [VBA Functions](#)

## Enhanced Performance

- Smart View performance has been enhanced; operations now run faster. In addition, a status bar, **Smart View Progress**, is displayed during operations. You can specify the time in seconds after which this status bar appears when an operation begins. To do so:

- 1 From the Smart View ribbon, select **Options** and then select **Advanced** from the left pane.

- 2 Under **Display**, select **Show Progress Information After**.
- 3 In the adjacent field, enter the number of seconds (up to 999) after the start of operations that you want the status bar to appear.
- 4 Click **OK**.

## Support for Financial Management Data Grids

You can now open and use Financial Management data grids in Smart View. See the Financial Management product documentation for information about data grids.

You can perform ad hoc analysis on data grids that were created and saved on a different server or on the same server whose name has changed. To do so, from the Smart View Panel, right-click the data grid name and select **Set Active Connection for This Worksheet**. This action updates the server information in **Sheet Info**.

**Note:** To use this feature, Financial Management Release 11.1.2.2.300 must be installed and you must be able to connect to it with Smart View.

## Support for Essbase Database Notes

Essbase users can view database notes associated with Essbase databases. To display database notes, from the Smart View Panel, right-click the name of an Essbase database, and then select **Database Note**. You cannot edit these database notes from Smart View.

This feature can be implemented in VBA by using the new VBA function, [HypGetDatabaseNote](#).

## Cell-Based POV for Essbase

In this release, you can select members directly from cells in the page dimension row of an Essbase grid rather than by using the POV toolbar. The new cell-based POV is available by selecting the down arrow in a page POV dimension cell; it works the same as the POV toolbar.

You can still use the POV toolbar as before by toggling the **POV** button on the Essbase ribbon. The cell-based POV and the POV toolbar selections are automatically synchronized, regardless of where the selections are made. If you change to a different alias table, the cell-based POV is populated with the proper alias names.

The cell-based POV can also be used with multiple-grid worksheets; however, you cannot toggle the **POV** button.

**Note:** This feature is available only for installations with Essbase and Oracle Hyperion Provider Services 11.1.2.1.102 and later.

## Improved Function Builder

The Function Builder has been redesigned for enhanced functionality and ease of use. In the new Function Builder:

- A cell reference can be selected for each function argument.
- If you know argument input values, you can create functions in offline mode.
- Type-in functionality is available for each argument.

You can use functions that were created in the previous version of the Function Builder.

However, the new Function Builder uses commas (,) to separate member list arguments rather than semicolons (;), which were used by the old Function Builder. Both characters are supported by the new Function Builder, but when you modify a function created in the previous version, you are prompted to convert to the new comma-separated format. If you choose not to convert, then none of your modifications to the function are applied.

► To create functions in the new Function Builder:

- 1 See the “Functions” chapter of the *Oracle Hyperion Smart View for Office User's Guide* or online help for descriptions and other information about the functions.
- 2 If you are working in connected mode, ensure that your connection is a private connection. If it is a shared connection, save it as a private connection before connecting.
- 3 Click the cell in which you want to enter the function.
- 4 From the Smart View ribbon, select **Functions**, and then **Build Functions**.
- 5 From **Select Function**, select a function and click **OK**.
- 6 From **Function Arguments**, for all functions except **HsGetSheetInfo**, select a connection name from the Connection drop-down menu. If an active worksheet connection is available, you can select **HSACTIVE**.
- 7 For each argument in the selected function, do one of the following:
  - To type in the member, enter the member in the text box as `dimension#member`; for example `Year#Qtr1` or `Year#Jan`.
  - To select the member, click the right-most button to open the **Member Selection** dialog box or, for **HsLabel** and **HsGetVariable**, a drop-down list of labels or variables.
  - To use cell references, follow the procedure in [Using Cell References](#).
- 8 Click **OK** to insert the function in the selected cell.
- 9 Refresh.

### Using Cell References

You can enter references to single cells that contain member names, connection names, variable names, and labels. References cannot be made to cell ranges.

► To use cell references:

- 1 Follow [step 1](#) through [step 6](#) in the preceding procedure.
- 2 In **Function Arguments**, for each argument in the selected function, click the button next to the text field.
- 3 In the grid, click the cell that contains the member name, then click OK in the Single Cell Reference dialog box.
- 4 In **Function Arguments**, the text field for the argument contains the referenced cell in the form " "&A3& " "

If the member name that you selected in step 3 is displayed as dimension#member in the grid, then the argument selection is complete. For example, if the member is displayed in the grid as Year#Qtr 2 in cell A3, then " "&A3& " " is complete.

If only the member name is displayed in the grid, then you must manually enter the dimension name followed by # between the first two sets of double quotation marks. For example, if the member is displayed as Qtr2 in cell A3, then you must enter Year# between the quotation marks: "Year#"&A3& " "

**Note:** If an argument text field contains text before you select a reference cell, the cell reference text is appended to this text. Therefore, delete any unwanted text in the field before selecting a cell for reference.

- 5 Click OK to insert the function in the selected cell.
- 6 Refresh.

## Fix Links

This new feature fixes links that may be broken when you uninstall Smart View on one drive and install it on another drive or send a Smart View file to a user who installs it on a different drive.

From the Smart View ribbon, select **Functions** and then **Fix Links**.

## User Variables in Financial Management Data Forms

If you use the relative time period functionality in a Financial Management data form, you can now have a member from the same dimension appear on the row, column, and POV. Smart View displays the relative time period members as user variables in the POV toolbar.

Additionally, when a Financial Management data form has selectable dimensions, rows, or columns, you can modify them in Smart View with user variables.

For example, in data form design mode, you can select either a member list or multiple members for a dimension, such as Period, and use the Period dimension on a row or column with the @Cur function. The Period dimension will then be represented in Smart View with user variables.

User variables resemble buttons in the POV toolbar in Smart View. When you click on the user variable buttons, the Member Selection dialog box is displayed. You then select members



applicable for the user variable. Any filters that apply to the selected user variable are loaded and viewable from the filter drop-down list. Once selections are made, you can easily change one or more of the user variable buttons, thus changing the POV of a data form in Smart View.

You must have Financial Management Release 11.1.2.2.300 or later installed, and Smart View Release 11.1.2.2.300 or later must be able to connect to it in order to use this feature. For information on using the relative time period functionality and for setting up selectable dimensions, rows, and columns in Financial Management, see the *Oracle Hyperion Financial Management Administrator's Guide*. To define and use user variables in Smart View, see the following procedure.

➤ To work with user variables for Financial Management data forms:

**1 In the Smart View panel, connect to a Financial Management data source and open a data form.**

Notice the available user variables in the POV toolbar across the top of the sheet. Selectable buttons are enabled, non-selectable buttons are grayed out.

**2 Click a user variable to display the **Member Selection** dialog box.**

**3 From **Member Selection**, select one or members to add to the selected user variable button.**

**4 Click **OK**.**

**5 Repeat [step 3](#) through [step 4](#) for all user variables buttons for which you want to select members and apply filters.**

**6 To use the user variable buttons, click each button for which you want to apply selected members, and make a selection from the drop-down list.**

**7 Click **Refresh** to view the updated data form.**

## VBA Functions

The following VBA functions are new in this release.

### HypExecuteMenu

Data Providers: All

#### Description

HypExecuteMenu() executes the specified menu or ribbon item.

You can use HypExecuteMenu *only* with these controls: button, split button, menu, dynamic menu, and toggle button (toggle buttons for extensions are not supported).

**Note:** For Office 2003, only menu items that come under Smart View can be executed. If an extension comes as a separate menu item in the menu bar of the Office application, then it is not supported.

## Syntax

HypExecuteMenu (vtSheetName, vtMenuName) As Long

ByVal vtSheetName As Variant

ByVal vtMenuName As Variant

## Parameters

**vtSheetName:** input variable, the name of the sheet where the menu item is to be executed.

**vtMenuName:** input variable, the name of the menu item to execute.

- For items that are displayed on multiple ribbons or menus, you must prepend the ribbon title (Office 2007 or later) or menu title (Office 2003) to the item name using the characters -> to avoid ambiguity. For example, to distinguish between **Refresh** on the Smart View ribbon and **Refresh** on the Essbase ribbon, use Smart View->Refresh or Essbase->Refresh. Duplicate items within the same data provider or extension ribbon cannot be used.
- Only items associated with an action are supported. For example **Panel** can be used, because it opens the Smart View Panel. **Connections** cannot be used, because it is not associated with an action.

## Return Value

Returns 0 if successful; otherwise, returns the appropriate error code. Common error codes for this function are -15 (invalid parameter) and -73 (ambiguity: "Could not resolve menu name").

## Example

```
Public Declare Function HypExecuteMenu Lib "HsAddin" (ByVal vtSheetName As Variant, _  
ByVal vtMenuName As Variant) As Long  
Sub Example_ExecuteMenu()  
sts = HypExecuteMenu("Sheet1", "Panel") 'returns 0  
sts = HypExecuteMenu(Empty, "Smartview->Refresh") 'returns 0  
sts = HypExecuteMenu("Sheet1", "Refresh") 'returns -73 (ambiguity)  
sts = HypExecuteMenu("Sheet1", "Connections") 'returns -15 (invalid parameter because  
"Connections" is not associated with an action)  
End Sub
```

## HypShowPanel

Data providers: All

## Description

HypShowPanel() shows or hides the Smart View Panel. Once hidden, the Smart View Panel will be displayed only when the user selects **Panel** on the Smart View ribbon or runs HypShowPanel to show it.

## Syntax

HypShowPanel Lib "HsAddin" (bShow)

ByVal bShow As Boolean

### Parameters

bShow: Input variable, determines whether the Smart View Panel is shown or hidden.

### Return Value

Returns 0 if successful; otherwise, returns the appropriate error code.

### Examples

To show the Smart View Panel:

```
Public Declare Function HypShowPanel Lib "HsAddin" (ByVal bShow As Boolean) As Long
Sub ShowPanel()
    sts = HypShowPanel(True)
End Sub
```

To hide the Smart View Panel:

```
Public Declare Function HypShowPanel Lib "HsAddin" (ByVal bShow As Boolean) As Long
Sub ShowPanel()
    sts = HypShowPanel(False)
End Sub
```

## HypGetVersion

Data Providers: All

### Description

HypGetVersion() retrieves the following information about the installed version of Smart View and creates a version information file:

- Product version number
- Build number
- Build date

### Syntax

HypGetVersion Lib (vtID, vtValueList, vtVersionInfoCommand)

ByVal vtID As Variant

ByRef vtValueList As Variant

ByVal vtVersionInfoCommand As Variant

### Parameters

vtID: Input variable, the ID for which the information is required; can be one of the following constants or strings or empty:

- BUILD\_DATE or “BUILD DATE”
- BUILD\_NUMBER or “BUILD NO”
- BUILD\_VERSION or “VERSION”
- PRODUCT\_ID or “PRODUCT” ID
- Empty: If empty, the output list contains all information in the version information file with comma-separated values.

vtValueList: Output variable, contains the array list or required value.

vtVersionInfoFileCommand: Input variable, a numerical command ID to save or launch the version information file if vtID is empty. Possible values are as follows:

- 0- Do nothing
- 1- Save the version information file
- 2- Launch the version information file

### Return Value

Returns 0 if successful; otherwise, returns the appropriate error code

### Examples

To create a message box that displays the build version:

```
Public Declare Function HypGetVersion Lib "HsAddin" (ByVal vtID As Variant, ByRef
vtValueList As Variant, ByVal vtVersionInfoCommand As Variant) As Long
Sub Example_HypGetVersion()
sts = HypGetVersion(BUILD_VERSION, version, 0)
MsgBox version(0)
End Sub
```

To retrieve and save version information in a version information file:

```
Public Declare Function HypGetVersion Lib "HsAddin" (ByVal vtID As Variant, ByRef
vtValueList As Variant, ByVal vtVersionInfoCommand As Variant) As Long
Sub Example_GetVersionInfoandSave()
sts = HypGetVersion("", versioninfo, 1) 'saves version info file in user directory and
gets array
inf = versioninfo(0) 'gets the information in 0th array element
End Sub
```

## HypGetLastError

Data Providers: All

### Description

HypGetLastError() returns the last error message stored in Smart View. It retrieves the error message as it is stored in the server (error messages returned via VBA functions may not match those retrieved from the server).

### Syntax

HypGetLastError (vtErrorCode, vtErrorMessage, vtErrorDescription)

ByRef vtErrorCode as Variant

ByRef vtErrorMessage As Variant

ByRef vtErrorDescription as Variant

### Parameters

vtErrorCode: The error code number

vtErrorMessage: The error message

vtErrorDescription: A description of the error

### Return Value

Returns 0 if successful; otherwise, returns the appropriate error code.

### Example

```
Public Declare Function HypGetLastError Lib "HsAddin" (ByRef vtErrorCode As Variant,
ByRef vtErrorMessage As Variant, ByRef vtErrorDescription As Variant) As Long
Sub Example_HypGetLastError
ReturnVal = HypGetLastError(ErrorCodeValue, ErrorMessageValue, ErrorDescriptionValue)
End Sub
```

## HypPerformAdhocOnForm

Data Providers: Planning

### Description

HypPerformAdhocOnForm() enables ad hoc analysis in Excel worksheets for Planning web forms.

### Syntax

HypPerformAdhocOnForm(vtSheetName, vtFormName)

ByVal vtSheetName As Variant

ByVal vtFormName As Variant

### Parameters

vtSheetName: Input variable; the name of the worksheet in which to enter data from the Planning web form for ad hoc analysis

vtFormName: Input variable; the name of the Planning web form, including its full path; for example, /Forms/Financials/Financials Summary

## Return Value

Returns 0 if successful; otherwise, returns the appropriate error code.

## Example

```
Public Declare Function HypPerformAdhocOnForm Lib "HsAddin" (ByVal vtSheetName As Variant, ByVal vtFormName As Variant) As Long
Sub Example_PerformAdhocOnForm
sts = HypPerformAdhocOnForm(Empty, "/Forms/Financials/Financials Summary")
End Sub
```

## HypGetDatabaseNote

Data providers: Essbase

## Description

Retrieves Essbase database notes. See [“Support for Essbase Database Notes” on page 6](#).

## Syntax

HypGetDatabaseNote (vtSheetName, vtDBNote)

ByVal vtSheetName As Variant

ByRef vtDBNote As Variant

## Parameters

vtSheetName: Input variable; the worksheet name

vtDBNote: Output variable; the database note

## Return Value

Returns 0 if successful; otherwise, returns the appropriate error code.

## Example

```
Public Declare Function HypGetDatabaseNote Lib "HsAddin" (ByVal vtSheetName As Variant, ByRef vtDBNote As Variant) As Long
Sub Example_HypGetDatabaseNote()
sts = HypGetDatabaseNote(Empty, DBNote)
MsgBox DBNote
End Sub
```

## New VBA Error Codes

-71 SS\_INVALID\_MEMBER: An invalid member is present; used with HypGetMemberInformation

-72 NO\_SV\_NAME\_RANGE: No named range exists; used with HypGetNameRangeList

-73 SS\_AMBIGUOUS\_MENU: Duplicate menu names that cannot be resolved exist; used with HypExecuteMenu

## New Settings for HypGetOption and HypSetOption

The following options constants have been added for HypGetOption and HypSetOption:

**Table 1** New Options Constants for HypGetOption and HypSetOption

Option	Constant
HSV_DECIMALPLACES	37
HSV_SCALE	38
HSV_MOVEFORMATS_ON_ADHOC	39
HSV_DISPLAY_INVALIDDATA	40
HSV_SUPPRESSCOLUMNS_MISSING	41
HSV_SUPPRESSCOLUMNS_ZEROS	42
HSV_SUPPRESSCOLUMNS_NOACCESS	43
HSV_SUPPRESS_MISSINGBLOCKS	44
HSV_SHOW_PROGRESSINFORMATION	117
HSV_PROGRESSINFO_TIMEDELAY	118

The options constants available as of Release 11.1.2.2 are listed in Table 18: Options Constants for HypGetOption and HypSetOption in Chapter 16, “VBA Functions” of the *Oracle Hyperion Smart View for Office User's Guide*.

# Features Introduced in Release 11.1.2.2

## Subtopics

- [Smart Query](#)
- [Support for 64-bit Microsoft Office 2010](#)
- [New Extensions](#)
- [Excel Formatting Enhancements](#)
- [Planning Enhancements](#)
- [Financial Management Configurable Dimensionality](#)
- [New VBA Functions](#)
- [Logging Levels](#)
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## Smart Query

The new Smart Query is a multidimensional analysis and reporting tool constructed from multiple sets of members and filters. You create a Smart Query by defining one or more sets of members from the dimensions in an application. To each member set, you can define and apply composite filters to further refine the data to be returned by the Smart Query. Using these sets and their filters, you can create a highly complex query by defining unions, complements, and intersections of data from the different sets.

Once a Smart Query is created, you can use it for ad hoc reporting and analysis. Smart Queries can be saved, reused, and shared. Sets and filters can be saved individually for use in other Smart Queries.

## Support for 64-bit Microsoft Office 2010

This release of Smart View supports the 64-bit version of Microsoft Office 2010. Please see the *Oracle Enterprise Performance Management System Installation and Configuration Guide* and *Oracle Hyperion Smart View Readme* for installation and usage information.

## New Extensions

Smart View supports two new extensions. When installed and set up, these new extensions display their own ribbons in Excel.

- Oracle Hyperion Strategic Finance, which integrates and consolidates financial forecast models among your corporate planning, business development, treasury, and investor relation groups.
- Predictive Planning, which works with Planning to predict data performance based on historical data.



## Excel Formatting Enhancements

The new **Move Formatting on Operations** option on the Formatting page of the Options dialog box enables you to apply your Excel formatting selections to expanded cells when you zoom in. This formatting also moves with the data when you pivot members.

## Planning Enhancements

This release of Smart View supports the following new features and enhancements for Planning. See the *Oracle Hyperion Planning New Features* and other Planning documentation for more information.

- **Cell history:** You can view the history of changes made to a data cell or range of data cells. For each change, the user who made the change, date, old value, and new value are displayed.
- **Master composite form:** Smart View supports Planning's new form type, master composite form, which has one master form and multiple simple forms. In a master composite form, the selection of members in the master form automatically filters to the members in the simple forms, and the simple forms display only the details that are relevant to the that are members highlighted in the master form. Forms that users do not have access to are automatically hidden in the composite form.
- **Attachment of multiple comments to data cells:** Data cell can now contain multiple comments added by one or more users. Depending on permission levels, users can add comments, view comments that other users have added, and edit and delete comments. Users cannot edit or delete comments added by other users.
- **Attachment of multiple documents to data cells:** Data cell can now contain multiple documents attached by one or more users. Depending on permission levels, users can attach documents, view documents that other users have attached, and edit and delete documents. Users cannot edit or delete documents attached by other users.
- **Customized confirmation messages:** When administrators define a shortcut menu for business rules, they can specify a launch confirmation message to display when a business rule is invoked. This enables planners to receive meaningful messages about the consequences of launching business rules.
- **Security:** Runtime prompts support Approvals security.

## Financial Management Configurable Dimensionality

Smart View supports Financial Management's configurable dimensionality, also new in this release.

You can now create applications with an unlimited number of custom dimensions. You can specify a dimension name and alias for custom dimensions, and specify the dimension size (small, medium, or large). You can create additional custom dimensions for existing applications as well as continuing to use existing Custom1, Custom2, Custom3, and Custom4 dimensions.

## New VBA Functions

This release features the following new VBA functions.

**HypGetMemberInformationEx:** For Essbase, returns all information about a member in an array.

**HypGetActiveMember:** For Essbase, Planning, Financial Management, and Hyperion Enterprise, returns the active member name for the given dimension.

**HypSetActiveMember:** For Essbase, Planning, Financial Management, and Hyperion Enterprise, sets the active member for a given dimension - page, POV, and user variables.

**HypGetDimensions:** For Essbase, Planning, Financial Management, and Hyperion Enterprise, returns an array containing the dimension names in the grid and an array containing their corresponding types.

**HypSetDimensions:** For Essbase, Planning, Financial Management, and Hyperion Enterprise, enables users to specify an array containing the dimension names in the grid and an array containing their corresponding types. This function is used to rearrange the metadata of the grid.

**HypGetMembers:** For Essbase, Planning, Financial Management, and Hyperion Enterprise, returns a list of selected or used members for a given dimension in the grid.

**HypSetMembers:** For Essbase, Planning ad hoc, and Hyperion Enterprise, sets the POV dimension choices in ad hoc grids. For Financial Management data forms, sets the page list.

**HypGetBackgroundPOV:** For Essbase, Planning, Financial Management, and Hyperion Enterprise, returns the list of background POV members as two string arrays. One string array contains the POV dimension names; the other contains the member names.

## Logging Levels

The following new log message display options are available for selection from the Advanced page of the Options dialog box:

- **Extended Info:** Information-level messages plus all server responses and requests. Adversely impacts performance.
- **Profile:** Extended Info log entries plus most function calls. Creates XML files for each Office application with active Smart View. Intended for debugging. Severely impacts performance.

## Miscellaneous

- The new **Panel** and **Connection** buttons on the Smart View ribbon make it easier and more intuitive to open the Smart View Panel and manage your connections. Previously, both these operations were controlled by one **Open** button.
- Using the new **Different Workbooks** selection from the Smart View ribbon **Cascade** button, you can now cascade reports each to a separate workbook.

## Hosted Online Help

Online help content for EPM System products is served from a central Oracle download location, which reduces the download and installation time for EPM System. You can also install and configure online help to run locally. For more information, see the *Oracle Enterprise Performance Management System Installation and Configuration Guide*.

## Features Introduced in Release 11.1.2.1.102

### Subtopics

- [Ad Hoc Operations in Multiple Cells](#)
- [Member Information](#)
- [Linked Objects](#)
- [Aliases and Alias Tables](#)
- [Sheet Level Options](#)
- [POV Toggle Button](#)
- [Multiple Grids](#)
- [Butterfly Reports](#)
- [New Zoom Options](#)
- [Formula Preservation](#)
- [Formula/Format Fill](#)
- [Use Excel Formatting Improvements](#)
- [Submit Data Without Refreshing](#)
- [New Smart View and VBA Functions](#)

**Note:** Unless otherwise noted, the features described here are available only in Smart View 11.1.2.1.102 connected to Essbase 11.1.2.1.102 through Provider Services 11.1.2.1.102. They are not available in other releases of Smart View, Essbase, or Provider Services. They are not available in data providers other than Essbase.

## Ad Hoc Operations in Multiple Cells

Previously, it was possible to perform ad hoc operations on one cell at a time. In this release, you can select a range of cells for these ad hoc operations: Zoom In, Zoom Out, Keep Only, and Remove Only.

## Member Information

By selecting the new Member Information button on the **Essbase** ribbon, you can view the following properties if applicable about any member in the grid:

- General information such as dimension, level, and generation
- Alias tables and corresponding aliases

- Dimensions, members, and types of attributes
- Formulas
- Comments
- User defined attributes

## Linked Objects

From the new **Linked Objects** dialog box, you can access the following objects in Excel:

- **Linked Reporting Objects**

A *linked reporting object* is a cell note, external file, or URL that is linked to a data cell in an Essbase database. From Smart View, you can view, attach, edit, and delete linked reporting objects associated with cells.

- **Linked Partitions**

A *linked partition* connects two databases by means of a data cell. Using a data cell associated with a linked partition, you can navigate from the database connected to the current grid to a second database. Because the two databases may have different dimensions, you can see the data in different contexts. When you launch a linked partition, a new spreadsheet that displays the dimensions from the linked database opens. From there, you can drill down into the dimensions of the linked database.

## Aliases and Alias Tables

- You can display member names and their aliases from the currently selected alias table together in the same row.
- If you enter a name from an alias table that is not associated with the current grid, its corresponding alias from the alias table that is associated with the current grid is displayed after you refresh.

## Sheet Level Options

Previously, all options specified in the Smart View **Options** dialog box were global options; they applied to the current workbook and all new workbooks and worksheets. In this release, some options are specific to the worksheet for which they are set. They are also the default option settings for *new* worksheets in the current workbook and for any new workbook. Changes to sheet level option settings do not affect existing worksheets or workbooks.

In the **Options** dialog box, these options are sheet level options:

- Member options
- Data options
- Formatting options

Advanced options, extensions, and cell styles remain global options, which apply to the entire current workbook and to any workbooks and worksheets that are created henceforth.

## POV Toggle Button

In this release, you can choose to display all dimensions on the grid rather than using the POV toolbar to select and move members to and from the grid. The POV toggle button introduced in Release 11.1.2.1 has been modified for Essbase connections; now it toggles between displaying the POV toolbar and displaying all dimensions with the POV toolbar hidden.

## Multiple Grids

In Essbase, you can create multiple independent grids on one worksheet. These grids can be connected to the same data source or to different Essbase data sources, and you can change the connection of a grid from Smart View.

Worksheets that support multiple grids can be created from blank worksheets or by converting existing ad hoc worksheets.

## Butterfly Reports

You can design report layouts other than the standard report with members above and to the left of the data grid. For example, you can create “butterfly” reports with a column of members between two columns of data cells.

## New Zoom Options

There are four new options for zooming in to data. As with existing zoom options, you can select any of these levels when you zoom, and you can set any of them as the default zoom level.

- **Same Level** to retrieve data for all members at the same level as the selected member .
- **Sibling Level** to retrieve data for the siblings of the selected members .
- **Same Generation** to retrieve data for all members of the same generation as the selected members .
- **Formulas** to retrieve data for all members that are defined by the formula of the selected member. The formula can be a member equation or a consolidation to the parent.

## Formula Preservation

In this release, you can choose to preserve formulas associated with members in the grid when you refresh and during ad hoc operations such as zooming.

## Formula/Format Fill

If member cells are associated with formulas, you can use the new **Formula/Format Fill** option to propagate these formulas to the members retrieved as a result of zooming in. For example, if member `Qtr1` is associated with a formula, then the formula can be propagated to `Jan`, `Feb`, and `Mar` when you zoom in on `Qtr1`.

In the same way, you can use **Format/Formula Fill** to propagate formatting during zooming.

## Use Excel Formatting Improvements

Improvements have been made to the **Use Excel Formatting** option to increase reliability and stability.

## Submit Data Without Refreshing

In this release, the requirement that you refresh the grid before submitting data in free-form mode has been eliminated.

## New Smart View and VBA Functions

### Subtopics

- [Smart View Functions](#)
- [VBA Functions](#)

### Smart View Functions

**HsGetVariable:** For Essbase, retrieves the associated values of substitution variables.

### VBA Functions

**HypAddLRO:** For Essbase, adds linked reporting objects to specified cells.

**HypDeleteLROs:** For Essbase, deletes one or more linked reporting objects from specified cells.

**HypDeleteAllLROs:** For Essbase, deletes all linked reporting objects from the specified cells.

**HypListLRO:** For Essbase, lists all linked reporting objects associated with specified cells.

**HypRetrieveLRO:** For Essbase, retrieves linked reporting objects associated with specified cells.

**HypUpdateLRO:** For Essbase, updates linked reporting objects associated with specified cells.

**HypSetOption:** For Essbase, enables you to set Smart View options as both default and sheet specific so you do not need separate VBAs for the two types of options.

**HypGetOption:** For Essbase, enables you to get Smart View options that are both default and sheet specific so you do not need separate VBAs for the two types of options.

**HypGetMemberInformation:** For Essbase, returns the properties for a selected member.

**HypExecuteDrillThrough:** For Essbase, executes the specified drill-through report.

**HypGetDrillThrough:** For Essbase, retrieves a list of drill-through reports.

**HypGetNameRangeList:** For Essbase, returns a list of named grids for a given connection.

**HypRetrieveNameRange:** For Essbase, refreshes the grid created by HypRetrieveRange.

**HypShowPOV** determines whether the POV toolbar is to be displayed or hidden.

**HypMenuVLRO:** For Essbase, opens the Linked Objects dialog box where you select cells to edit linked objects.

**HypMenuVMemberInformation:** For Essbase, opens the Member Information dialog box where you view detailed information about members.

## Features Introduced in Release 11.1.2.1

### Subtopics

- [Overview](#)
- [Financial Close Management Integration with Outlook](#)
- [Planning Features](#)
- [Redesigned Member Selection Dialog Box](#)
- [POV Enhancements](#)
- [Smart View Options Enhancements](#)
- [Support for Office 2010](#)
- [New Smart View and VBA Functions](#)
- [Alias Tables](#)
- [New Languages](#)
- [Right-Click Data Provider Preferences](#)

## Overview

This document describes the new features introduced in Smart View Release 11.1.2.1

It is our goal to make Oracle products, services, and supporting documentation accessible to the disabled community. Smart View Release 11.1.2.1 supports accessibility features, which are described in Appendix A of the *Smart View for Office User's Guide*.

## Financial Close Management Integration with Outlook

Oracle Hyperion Financial Close Management task lists are now integrated into Outlook, so Oracle Hyperion Financial Close Management users can integrate their tasks into Outlook tasks and perform these tasks from within Outlook.

## Planning Features

This release of Smart View supports the following new features for Planning connections.

### Direct Connections Between Smart View and Planning

Planning no longer relies on Oracle Hyperion Provider Services for ad hoc connections. Direct connections between Smart View and Planning enable Planning grids to function the same in Smart View as in the Web.

### Save Ad Hoc Grids as Data Forms

Using the new **Save Ad Hoc Grid** button on the Planning Ad Hoc ribbon, planners assigned the ad hoc grid creator role can save and store ad hoc grids as data forms. This behavior replaces Smart Slice functionality for Planning in this release.

### Redesigned Member Selection Dialog Box

The Member Selection dialog box has been redesigned to improve ease-of-use and provide more options for selecting members for the grid. The following enhancements have been made to the Member Selection dialog box:




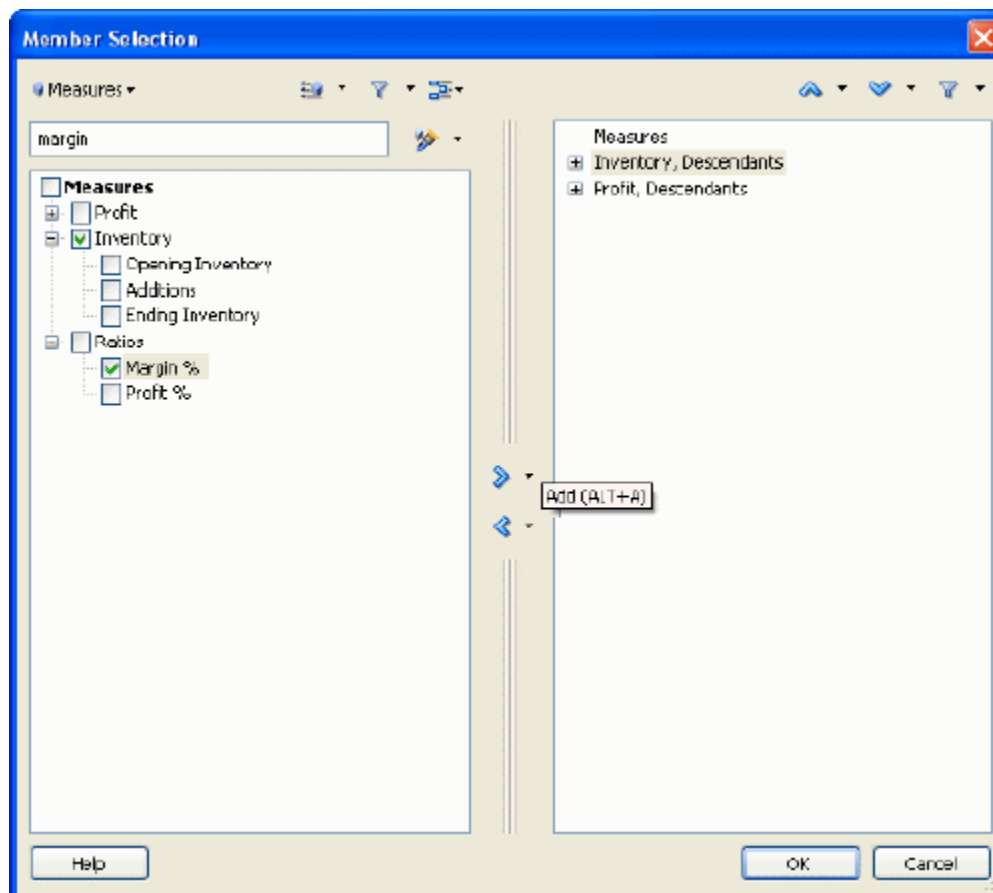
- **Find button** : When you enter a name in the member name entry field, the Find button is enabled. This button enables you to find and select one or more members with options to find next, find previous, check all found members, or clear the entry field.
- **View button** : This button enables you to select whether to display members in the member list as a hierarchy or as dynamic time series members. For dimensions that contain attribute members, you can also select attributes and subsets of attributes based on conditions that you set.
- **Options button** : This button provides options for displaying and selecting children, descendants, or base members in member tree list. Essbase and Planning users can also change alias tables here.
- **Drop-down menus in the Add and Remove buttons**: Instead of selecting members individually, you can choose to move checked items along with their children, descendants, level, generation, or user-defined attributes (UDA), if applicable, between the member list and selection list. These menus are available only if the View selection is **Hierarchy**.



Figure 1 Member Selection Dialog Box



## POV Enhancements

In this release, the Point of View (POV) has been made easier to use with the following new features:

- **POV toggle button:** You can easily hide or display the POV as needed by clicking on the new **POV** toggle button available from all data source ribbons.
- **Type member names in the POV:** If you know the name of a member that you want to add to the grid, you can simply enter the name over its corresponding dimension in the POV, then drag it to the grid. In previous releases, you had to open and navigate through the Member Selection dialog box to find and select members.
- **Simplified drag and drop:** It was possible to drag and drop members to and from the grid in previous releases, but the process is simpler now. To add a member to the grid, click the down arrow next to the member name in the POV and drag it to the grid. To move a member from the grid to the POV, right-click its cell and drag it to the POV.
- **Docking enhancements:** If you dock the POV, the docked position is retained when you open Smart View in the future. In addition, POV controls are reoriented based on the docked position.

## Smart View Options Enhancements

The following new options are available from the Options dialog box:

- **Adjust Column Width:** Enable Smart View to adjust grid column widths automatically to fit cell contents.
- **Enhanced Query Performance:** Enable faster performance during queries by directing Smart View not to maintain comments and formulas when you perform such operations as zooming. When you select this option, comments and formulas are not deleted from the original worksheet, but they are not carried through operations on the sheet.
- **Disable options that are not valid for the active connection:** Disable options on the Options dialog box if they are invalid for the active connection.
- **Use Excel Formatting and Retain Numerical Formatting** are now mutually exclusive options.

## Support for Office 2010

With this release, you can use Smart View with Microsoft Office 2010 (32-bit only) in addition to Office 2003 and 2007.

## New Smart View and VBA Functions

This release features the following new functions.

### Smart View Functions

**HsDescription:** For data sources Essbase, Financial Management, and Hyperion Enterprise, you can use the new function HsDescription to display the description of the selected member.

### VBA Functions

**HypIsAncestor:** For Essbase, checks whether the specified member is the ancestor of another specified member.

**HypIsChild:** For Essbase, checks whether the specified child member is the child of a specified parent member. HypIsChild checks only for children, not for all descendants.

**HypIsDataModified:** For Essbase, Planning, Financial Management, and Hyperion Enterprise, checks to see whether any data cells have been modified but not yet submitted.

**HypRetrieveAllWorkbooks:** For Essbase, Planning, Financial Management, and Hyperion Enterprise, refreshes all open workbooks from the same instance of Excel.

## Alias Tables

You can select an alias table for the current worksheet or for a connection.

- **Current worksheet:** An alias tables selected for the current worksheet applies only to the current worksheet and not to future connections. Changing the alias table automatically refreshes the grid with the new alias table.
- **Connection:** An alias table selected for a connection is permanent until changed and will be used each time you use this connection. Setting a connection alias table does not refresh the grid even if you click Refresh.

## New Languages

Smart View is now available in the following languages:

- Arabic
- Polish
- Norwegian

**Note:** In this release, the online help and documentation for Arabic and Norwegian versions of Smart View is in English. Arabic and Norwegian help and documentation will be available in a future release.

## Right-Click Data Provider Preferences

In this release, you can open the User Preferences dialog box for data providers by simply right-clicking the provider node in the Smart View Panel and selecting **User Preferences**. Previously, you had to select preferences in the Options dialog box.

# Features Introduced in Release 11.1.2

## Subtopics

- [Smart View Panel](#)
- [Context-Sensitive Ribbons](#)
- [Integration with Outlook](#)
- [Redesigned Options Dialog Box](#)
- [Planning Features](#)
- [Financial Management Features](#)
- [Smart View and Disclosure Management Integration](#)
- [New VBA Functions](#)
- [EPM System New Features](#)

## Smart View Panel

From the Smart View Panel, you can manage data source connections, access data and task lists, create reports, and open Oracle Crystal Ball Enterprise Performance Management workbooks if you are licensed for Crystal Ball EPM.

The Smart View Panel, opened from the Smart View ribbon, is displayed by default on the right side of the Microsoft Office application. You can move, re-size, or close the Smart View Panel from the down arrow in the title bar.

The Smart View Panel contains the following panes:

- **Home:** A panel that displays links to shared connections and private connections as well as a list of recently used items - ad hoc grids, data forms, and tasks - which you can click to establish a connection.
- **Shared Connections:** A drop-down menu of available connections from Oracle Hyperion Shared Services and a tree view of the contents of the currently selected connection.
- **Private Connections:** A drop-down menu of available connections saved on the local computer and a tree view of the contents of the currently selected connection. You can also enter a URL to connect directly to a data source here.
- **Task Lists:** A tree list of tasks from which you can manage your tasks. This pane opens only when you select a task list from shared connections or private connections.
- **Simulation Workbook:** (only if you are licensed for Crystal Ball EPM) A tree list of available Oracle Crystal Ball Enterprise Performance Management workbooks that you can open in Smart View.
- **Action Panel:** A list of operations available based on the selection in the shared connection, private connection, or task list tree list.

## Context-Sensitive Ribbons

Smart View operations in Microsoft Office applications are available through ribbon commands. The Smart View ribbon, which contains commands for common Smart View operations, is

always present. When you connect to a data source (other than Oracle Hyperion Reporting and Analysis), the corresponding data source ribbon is also displayed. For Planning, Financial Management, and Hyperion Enterprise, when you enter ad hoc analysis, the data source ribbon is automatically replaced by its ad hoc version. Each ribbon displays only the commands permitted for that data source, mode, and Office application.

These are the new ribbons:

- **Smart View**
- **Essbase**
- **Planning**
- **Planning Ad Hoc**
- **HFM (Financial Management )**
- **HFM Ad Hoc**
- **Enterprise (Oracle Hyperion Enterprise®)**
- **Enterprise Ad Hoc**
- **OBIEE (Oracle Business Intelligence Enterprise Edition)**

**Note:** Microsoft Office 2003 users can still access Smart View operations via menus.

## Integration with Outlook

Planning and Financial Management task lists are now integrated into Outlook, so users can integrate their tasks into Outlook tasks and perform these tasks from within Outlook. Data form tasks are seamlessly launched from Outlook into the familiar Excel interface.

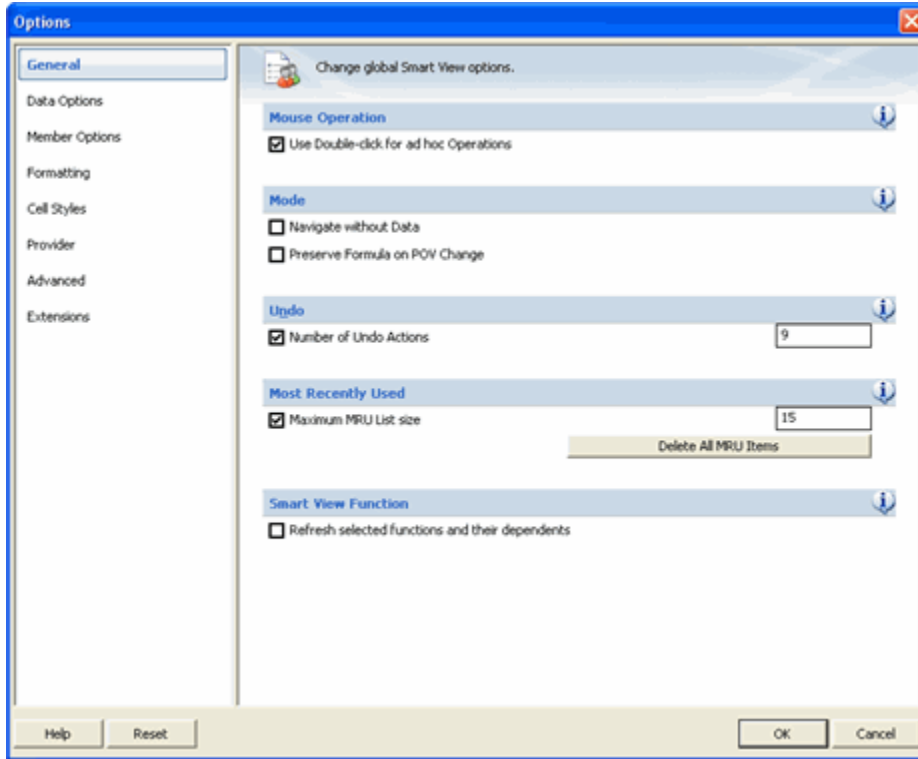
## Redesigned Options Dialog Box

The Smart View Options dialog box has been redesigned to make options more easily accessible. Options are organized into categories to provide better user experience and accommodate provider-specific options. Like other components of Smart View in this release, options are available to users only if they are supported by the currently connected data source.

The following new options are available from the Options dialog box:

- Change the language in which Smart View is displayed without having to re-install Smart View
- In shortcut menus, choose whether to display Smart View and Microsoft items or only Smart View items
- Reset all options to default setting with a click of the Reset button

Figure 2 Options Dialog Box



## Planning Features

This release of Smart View supports a greatly expanded set of Planning functionality.

- Planning task lists are now integrated into Outlook, so planners can integrate their tasks into Outlook tasks, and can perform these tasks from within Outlook. Planning data form tasks are seamlessly launched from Outlook into the familiar Excel interface
- Planning task lists are available in Office, including task status and task reports; users can perform tasks in Excel, and have them automatically synchronized with the Web
- All process management end-user functionality can be accessed from Outlook and Excel
- Data validation, including validation indicators and messages
- The ability to monitor the status of Planning jobs in the Job Console
- Composite data forms in Microsoft Office with shared dimensions that are automatically synchronized across multiple data forms
- Mass Allocate and Grid Spread for spreading values
- Copy data across versions for scenario-entity combinations
- Dynamic user variables that allow end users to select and change user variable values directly in data forms
- Custom right-click menus for data and metadata
- Member formula display

- Setting Planning user preferences within Smart View
- Data forms enabled for ad hoc allow users to slice data and save a slice to create reports or share with other users

For information about Planning, see the *Oracle Hyperion Planning New Features* and *Oracle Hyperion Planning User's Guide*.

## Financial Management Features

In this release, Smart Slices are available to Financial Management users who connect to Smart View. Using Smart Slices, Financial Management users can create and save reports from the Report Designer and cascade reports across a selected dimension.

## Smart View and Disclosure Management Integration

Customers who use Smart View in Excel or Word to assemble financial reports can also use Oracle Hyperion Disclosure Management, which allows you to assemble a reporting package for submission to a regulatory agency that includes financial statements, as well as supporting schedules and commentary which may exist in Excel, Word, or an Oracle Hyperion Financial Reporting report.

The first release of Oracle Hyperion Disclosure Management offers a complete XBRL creation and management solution with Enterprise level XBRL mapping; XBRL Taxonomy management, editing and viewing; and Instance document creation, validation and viewing. While viewing Smart View queries in Word or Excel, users can perform data source level mapping with the XBRL Taxonomy Mapping Tool, that allows for re-usable taxonomy element mapping within Oracle Hyperion Financial Management, Oracle Hyperion Planning, and Oracle Essbase.

## New VBA Functions

This release features the following new VBA functions.

- **HypFindMemberEx** retrieves member information like dimension, alias, generation and level names.
- **HypSetAsDefault** creates a connection default.
- **HypOpenForm** opens a data form.
- **HypSetPages** sets page members for the selected sheet.
- **HypGetPagePOVChoices** returns the available member names and member description for a given dimension.
- **HypDeleteMetaData** deletes Smart View metadata from the workbook.
- **HypGetSharedConnectionsURL** returns the Shared Connections URL to be used (also shown in the Options dialog box).

- `HypSetSharedConnectionsURL` sets the Shared Connections URL in the config file and Options dialog box.
- `HypIsConnectedToSharedConnections` checks whether Oracle Hyperion Smart View for Office is connected to Shared Connections.

## EPM System New Features

- Most Oracle Enterprise Performance Management System products have adopted Oracle Diagnostic Logging (ODL) as the logging mechanism. The ODL framework provides uniform support for managing log files, including log file rotation, maximum log file size, and the maximum log directory size. For more information, see the “Using EPM System Logs” chapter of the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.
- Oracle Configuration Manager (OCM) integrates with My Oracle Support and provides configuration information for Oracle software. It assists in the troubleshooting, maintenance, and diagnostics of your EPM System deployment. For more information about Oracle Configuration Manager see the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.
- With this release, many EPM System products support hostnames that resolve to IPv6 addresses. See the *Oracle Hyperion Enterprise Performance Management System Certification Matrix*. IPv4 support (both hostname and IP address) remains unchanged from earlier releases.
- Oracle Enterprise Performance Management System supports the following types of SSL configurations:
  - Full SSL Deployment (including data access)
  - SSL Terminating at the Web Server
  - SSL Accelerators (Off-loading)
  - Two-way SSL

For more information on the SSL configurations, see the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.





## COPYRIGHT NOTICE

Smart View New Features, 11.1.2.2.310

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