

Hyperion® Smart View for Office
Release 9.2.1.0.0
Readme

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Note: Any references in the documentation to the Oracle® E-Delivery site pertain only if your site has access.

Purpose

This document includes important, late-breaking information about Oracle's Hyperion® Smart View for Office Release 9.2.1. Review this information thoroughly before installing Smart View Release 9.2.1.

Also included is information about Hyperion® Shared Services, Hyperion® Essbase® – System 9, Hyperion® Planning – System 9, Hyperion® Financial Management – System 9, Hyperion® Reporting and Analysis – System 9, Hyperion® Financial Reporting – System 9, Hyperion® Interactive Reporting – System 9, Hyperion® Essbase® Spreadsheet Add-in, Hyperion® System 9 BI+ Smart View Provider, and Hyperion® SQR® Production Reporting – System 9, as they relate to Smart View.

Installation Updates

Software Requirements

The software requirements for client computers are listed below.

Note: You must follow the supported client and operating system requirements.

The Client

Supported Client Software

- Microsoft Office 2000
- Microsoft Office XP (2002)
- Microsoft Office 2003 (smart tags require Office 2003 or later)

Supported Operating Systems

- Windows 2000 Professional, Service Pack 4
- Windows 2000 Server, Service Pack 4
- Windows XP Professional, Service Pack 1a
- Windows 2003 Standard Edition
- Windows 2003 Enterprise Edition, Service Pack 1
- Windows Vista

Hyperion Product Compatibility Matrix

The following table provides a list of Hyperion products and release numbers that support Smart View Release 9.2.1.

Hyperion Product	Release
Financial Management	4.1.1, 9.2, 9.2.1
Planning	4.1.1, 9.2, 9.2.1
Essbase	9.0.1, 9.2, 9.2.1
Reporting and Analysis	9.0.1, 9.2, 9.2.1

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Known Issues

The known issues are divided into the following categories.

General Information

- When you install Smart View on Vista, you are not prompted for Administrator credentials at the beginning as expected; instead, you get an error stating that you do not have sufficient privileges to install and that you must retry the installation. **Workaround:** to start the

installation, right-click smartview.exe and select Run as Administrator. You will be prompted for credentials, then you can continue the installation. This behavior is determined by Vista. (6576419, 8-577431001)

- Connection URL examples:
 - Essbase URL example:
http(s)://<server name>:13080/smartview/SmartView
 - Financial Management URL example:
http(s)://<server name>/hfmofficeprovider/hfmofficeprovider.aspx
 - Planning URL example:
http(s)://<server>:8300/HyperionPlanning/SmartView
 - Reporting and Analysis URL example:
http(s)://<server>:19000/workspace/browse/listxml
- Connection names cannot exceed 20 characters.
- Financial Management connections must be connected at the cube level and not at the application level.
- End users running both the Smart View and Essbase Spreadsheet Add-ins should reboot their client machine after installing Smart View.
- Smart View can be used with Microsoft Outlook 2003 by enabling Microsoft Word as the default editor for Outlook. To enable this option in Office 2003, choose Tools > Options > Mail Format and select the option, "Use Microsoft Office Word 2003 to edit e-mail messages." Using Smart View with Outlook supports only functions and Reporting and Analysis content.
- Microsoft Excel supports 40 color types. Content imported into Smart View is mapped as closely as possible to the available colors.
- The POV selector does not use Custom dimension aliases. For example, if the alias for the Custom 1 dimension is "Products", the POV selector displays "Custom 1" instead of the "Products" alias.
- After clearing the Hyperion Smart View for Office check box in the Add-Ins dialog box, the toolbar and Hyperion menu are removed. However, upon selecting the Smart View check box again, the toolbar reappears, but the Hyperion menu does not. You must restart Excel to restore the Hyperion menu.
- When accessing functions using smart tags while connected to an Essbase provider, the menu displays more functions than supported in Essbase.
- In Excel, if you have Smart View installed, the default status bar at the bottom of the screen is not displayed. Instead, you may see, for example, "Not Connected [Online Connection:] App:"
- For Multibyte character set (MBCS) characters to be displayed properly in Smart View dialog boxes, MBCS must be installed on the client machine and their languages must be specified in Regional Options or Regional and Language Options in the Windows control panel.
- To create a sheet with Ad Hoc analysis and functions on the same sheet, first create an Ad Hoc grid before adding function to it; otherwise, running refresh only updates the functions.
- If a sheet contains a formula with references to another workbook that is not opened, Smart View automatically updates the links.

Legacy VBA Support

The Smart View Spreadsheet Toolkit is independent of the VBA toolkit included in Essbase Spreadsheet Add-in. Any function calls from the Essbase Spreadsheet Add-in VBA toolkit will not operate when connected to Hyperion Smart View for Office. To use a worksheet containing legacy function calls, you must do one of the following:

- Change the legacy function call from the Essbase Spreadsheet Add-in toolkit to the Smart View toolkit. In many instances, this will require an update only to the name of the function used in the VBA application and include the Smart View function declarations.
- Connect to Essbase Spreadsheet Add-in to use those sheets that contain legacy function calls.

Ad Hoc Analysis

- If you try to zoom in on a grid after relocating it, the zoom in fails. Instead, you need to refresh the grid for the query to work properly.
- The HypKeepOnly and HypRemoveOnly VBA functions do not support multiple range selection.
- If All Levels is set for the zoom options, zooming in on a member, then zooming out may result in extra repeated columns in a grid.
- If you disconnect from a sheet using the Disconnect menu command first, then call the HypDisconnect VBA function, no error message is displayed.
- HypCell only works if all dimensions are specified in the syntax. For example, HypCell ("Sheet1", "Market#East") will not return the correct value.
- Drill-through reports only work against English databases. You cannot use the drill-through reports feature against a non-English database.
- You cannot execute a drill-through report when the drill-through intersection is on a Hybrid Analysis or an Advanced Relational Access member.
- Performing Ad Hoc queries to Smart View and Essbase Spreadsheet Add-in on the same worksheet is not supported. For example, if you were previously connected to a Smart View data source and then connected to an application and database through Essbase Spreadsheet Add-in on the same worksheet, intermixing Ad Hoc queries between Smart View and Essbase Spreadsheet Add-in may return invalid Smart View results.

Workaround: Once you have connected to a Smart View data source on one worksheet and subsequently disconnected, use a separate worksheet to connect to an application and database with Essbase Spreadsheet Add-in.

- In the POV Manager, accessing Member Selection and selecting duplicate members causes Ad Hoc operations to fail, making it necessary to restart Excel.

Workaround: From the data grid, use the Hyperion > Member Selection command to select duplicate members.

Functions

- The install location has been changed from the location used for Smart View 7.2 and 7.2.1. The new default location is c:\Hyperion\SmartView. If you open a workbook containing Smartview functions from a previous release, you will be prompted to update the links.
 1. Click No to the first message box, prompting the user to update the linked information.
 2. From the Excel menu select Edit > Links. Highlight the source file for HsTbar.xla and click Change Source.
 3. Browse for the location of HsTbar.xla file and click OK and save the workbook.
- Referencing an HsGetValue function within an HsSetValue function is not supported. For example:
Cell B1: =HsSetValue(A1, "[data source]", "Scenario#Budget") where Cell A1: =HsGetValue("[data source]", "Scenario#Actual")
- Hyperion Smart View functions cannot contain more than 256 characters. This limit is set by Microsoft Excel.
- The migration utility does not convert the parent entity when referenced from another cell in the function. For example, =HsGetValue(\$AM\$1&\$AM\$2), where \$AM\$2 references PR#, the PR# will not be converted. Note: PR# is no longer valid for the Smart View functions; the Parent is included in the Entity dimension; for example, NorthAmerica.Connecticut
- Functions using the background POV display the same value after the background POV was changed in the POV Manager. Apply Refresh to update the value.
- In PowerPoint, the smart tag menu shows Functions > No Connections even though Smart View is connected to the provider.
- In Word and PowerPoint, after successfully connecting to a provider, then using the smart tag menu to access functions, such as HsGetValue, if you open another instance of Word or PowerPoint, you get an error message when you access the functions again.

Data Forms

- Worksheet protection is applied to forms that are saved as worksheets.
- When you create a formula on members that calculates the value for a Summary Time Period and then you modify the data for the Summary Time Period member, sometimes Smart View considers that cell to be a dirty cell.
- Cells whose Data Type is set to Percentage display differently when their value is entered directly into the cell and when their value is calculated by a formula, even though their actual value is correct in either case. For example, if you enter 6 directly into a cell, it displays as 600%. However, if a value of 6 is calculated by a formula for that cell, it displays as 6.
- After a data form is taken offline, synced back to the server, and saved as an Excel workbook, the status bar does not display the data source information and the POV/page toolbar is not displayed. The workaround is to refresh or re-associate the data source after you sync the data form back to the server.

- If you have a worksheet where the source data form was renamed and moved, then taking the data form offline fails.
- If you select the Suppress #Missing option when there is no data in the rows, all rows are suppressed. If you then save the data form as an Excel workbook, the next time you open the workbook, the POV is not displayed.
- The order in which members are displayed in Planning may differ from the order in which they are displayed in the Business Rules Member Selection dialog box.
- When the "Preserve Formula on POV Change" option is enabled, cells that contain formulas in one page are marked as dirty when you switch to another page. Select Hyperion > Submit Data to clear the dirty cells when switching to another page.
- Multiple copy and paste of cells containing formulas is not supported.
- Data does not sync to the server if the Suppress #Missing option was selected while the form was in offline mode.
Workaround: If a form definition is changed online, the Planning administrator must restore the form definition to what it was originally before it was taken offline.
- While working in a Planning data form, if data is modified on the Planning web server and you click Refresh, the grid size may change. Any formulas inserted within the original grid limit are deleted. To correct, exit Excel and reopen the data form.
- On Korean operating systems, the Expand and Collapse toolbar buttons are disabled. You must use the menu commands instead.

Financial Reporting

- Switching to an ad-hoc query after importing a report as Query-Ready can cause Excel to stop responding when the report contains a text row as the first row in the grid. To successfully convert to ad-hoc queries, ensure that a data row is the first row in the grid before importing.
- When importing reports, numbers will default to a number value and two decimal places.
- Importing reports using Smart View will refer to the end user's current User POV. In addition, the default prompt response will be used for any reports containing prompts.
- In some cases, an error may occur when refreshing previously imported reports in Excel 2000/2002 (XP). The workaround is to reimport the report.
- When modifying an Outlook email draft containing Smart View content, such as an imported BQY job output, you cannot refresh until you reconnect to the Reporting and Analysis provider. This issue occurs on Interactive Reporting and Production Reporting as well.

Interactive Reporting

- Importing Chart section into Excel does not preserve number formats.
- When imported into Excel, the Japanese Yen symbol may be preceded by an extraneous \ character.
- When imported into Excel, date formats containing Japanese characters may be improperly converted.

Production Reporting

- After installing Ghostscript on the SQR machine, you must add the Ghostscript bin directory to the system path and reboot to ensure successful image generation. In some cases, the Ghostscript bin directory must be added here as well:
 - On Unix add <GSHome>bin to the PATH in the `setenv.sh` under <BI+ Home>/bin/SQR/Server/dbtype/bin.
 - On Windows add <GSHome>bin to the PATH in the `set_common_env.bat` under <BI+ Home>/bin.
- In some cases, values may not line up in expected columns when importing or exporting in Production Reporting.
 - If data values do not line up due to empty columns required prior to where the data should be placed, then use the Production Reporting print statement to print a space in each cell. Example: If you want to print a line with data in columns 'A' and 'D' then include two additional print statements to print a single space (' ') for columns 'B' and 'C'.
 - Use Production Reporting print statements for report formatting instructions rather than Print-Directs when generating an Excel output type.
- Importing of charts is not supported in this release.
- SQR output jobs that are imported into Word or PowerPoint as images may appear blurry, especially for older versions of Microsoft Office.

Shared Services

- After registration of Smart View Provider on UNIX to 9.2.1 Shared Services, Smart View may not be able to connect to Shared Services. **Workaround:** restart Hyperion® Shared Services.(6618827)

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Defects Fixed in This Release

- With Smart View active, if you make changes to a macro in an XLA file and click Save, the changes are ignored and the file is not saved. (6585086, 8-625336652)
- In Excel when SmartView is active and the active workbook has been changed, the following VBA commands do not work: `ActiveWorkbook.Close` and `ActiveWindow.Close` when followed by `SaveChanges:=True` or `SaveChanges:=False`, or preceded by `Application.DisplayAlerts = False`. In these cases, you get an unwanted prompt to save, but, the file is not saved. (6585085, 8-625336614)
- In Smart View connected to Hyperion Provider Services, formulas in the German version of Excel change from German to English when the worksheet is refreshed. This renders the formulas unusable. (6585081, 8-625336290)
- When you initiate an ad hoc grid in Smart View, the font color changes to gray. (6584298, 8-621011865)

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Documentation Updates

Release 9.2.1 Product Name Changes

The user interface in Oracle's Hyperion products has been rebranded for Release 9.2.1 to incorporate a new logo, new copyright and trademark information, and new product names. Products referred to in this Readme also reflect the current product names. However, because the core documentation for Release 9.2.1 has not been updated, products are still referred to by their previous names in the documentation.

References to Hyperion Download Center may still exist in the documentation. Hyperion products and documentation are now available on the [Oracle Technology Network](#) or the Oracle® [E-Delivery](#) site.

Documentation display issues using Internet Explorer 7 in Microsoft Windows Vista

When you open HTML help using Internet Explorer 7 in Microsoft Windows Vista, the initial help page displays without the Content, Index, and Search tabs. Right-click the Internet Explorer Information Bar and choose "Allow Blocked Content" to display the Content, Index, and Search tabs. When you do this, the message, "Internet Explorer cannot display the webpage" displays in the right pane. Using any of the tabs or links in the left pane displays the correct page, and the help system behaves normally until you close it.

Incorrect Excel formatting information in Smart View User's Guide and online help

The *Smart View User's Guide 9.2* contains an error on page 51 under "Using Excel Formatting." The second bullet states:

- Application styles selected in the Cell Styles tab of the Options dialog box are not applied.

It should state:

When this option is selected:

- Application styles selected in the Cell Styles tab of the Options dialog box are not applied for Submit and Refresh actions. They are applied for Zoom In and Zoom Out actions.

Incorrect VBA information in Smart View User's Guide and online help

The *Smart View User's Guide 9.2* contains some incorrect information about VBA functions. The following table describes the errors and their locations in the guide (8-565954748).

Function	Incorrect Example Declaration in User's Guide	Correct Example Declaration
HypListCalcScripts p.217 Example incorrectly omits scriptArray parameter	Declare Function HypListCalcScripts Lib "HsAddin.dll" (ByVal sheetName As Variant) As Long	Declare Function HypListCalcScripts Lib "HsAddin.dll" (ByVal sheetName As Variant,ByRef scriptArray) As long
HypOtlGetMemberInfo p. 218 There is no dimName	Declare Function HypOtlGetMemberInfo Lib "HsAddin.dll" (ByVal sheetName As Variant, ByVal dimName As Variant, ByVal	Declare Function HypOtlGetMemberInfo Lib "HsAddin.dll" (ByVal sheetName As Variant,

parameter Return type is Long, not Variant	member As Variant, ByVal predicate As Variant, ByRef mbrArray As Variant) As Variant	ByVal member As Variant, ByVal predicate As Variant, ByRef mbrArray As Variant) As Long
HypQueryMembers p. 222-224 Return type is Long, not Variant	Declare Function HypQueryMembers Lib "HsAddin.dll" (ByVal sheetName As Variant, ByVal member As Variant, ByVal predicate As Variant, ByVal opt As Variant, ByVal dimName As Variant, ByVal input1 As Variant, ByVal input2 As Variant, ByRef mbrArray As Variant) As Variant	Declare Function HypQueryMembers Lib "HsAddin.dll" (ByVal sheetName As Variant, ByVal member As Variant, ByVal predicate As Variant, ByVal opt As Variant, ByVal dimName As Variant, ByVal input1 As Variant, ByVal input2 As Variant, ByRef mbrArray As Variant) As Long
HypRetrieve p. 227 There are no vtRange, vtLock parameters	Declare Function HypRetrieve Lib "HsAddin.dll" (ByVal sheetName As Variant, ByVal vtRange As Variant, ByVal vtLock As Variant) As Long	Public Declare Function HypRetrieve Lib "HsAddin" (ByVal sheetName As Variant) As Long

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Supported Languages

This release of Smart View 9.2.1 supports the following languages:

- Brazilian Portuguese
- Chinese (Traditional and Simplified)
- English
- French
- German
- Japanese
- Korean
- Russian
- Spanish
- Turkish

Note: The documentation has not been translated into Traditional Chinese. Because Financial Management has not been translated into Brazilian Portuguese, Turkish, or Korean, its error messages are in English.

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More Information

For more information about Oracle's Hyperion® Smart View for Office, Oracle's Hyperion® Shared Services, Oracle's Hyperion® Essbase® – System 9, Oracle's Hyperion® Planning – System 9, Oracle's Hyperion® Financial Management – System 9, Oracle's Hyperion® Reporting and Analysis – System 9, Oracle's Hyperion® Financial Reporting – System 9, Oracle's Hyperion® Interactive Reporting – System 9, Oracle's Hyperion® Essbase® Spreadsheet Add-in, Oracle's Hyperion® System 9 BI+ Smart View Provider, and Oracle's Hyperion® SQR® Production Reporting – System 9, please see the relevant product documentation.