

ORACLE® HYPERION SMART VIEW FOR OFFICE,  
FUSION EDITION

RELEASE 11.1.2

NEW FEATURES

ORACLE®  
ENTERPRISE PERFORMANCE  
MANAGEMENT SYSTEM

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## Overview

This document describes the new features introduced in Oracle Hyperion Smart View for Office, Fusion Edition Release 11.1.2.

It is our goal to make Oracle products, services, and supporting documentation accessible to the disabled community. Smart View Release 11.1.2 supports accessibility features, which are described in Appendix A of the *Smart View for Office User's Guide*.

## 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, Fusion Edition 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's 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, Fusion Edition 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's Hyperion Reporting and Analysis), the corresponding data source ribbon is also displayed. For Oracle Hyperion Planning, Fusion Edition, Oracle Hyperion Financial Management, Fusion Edition, and Oracle's 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's 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.

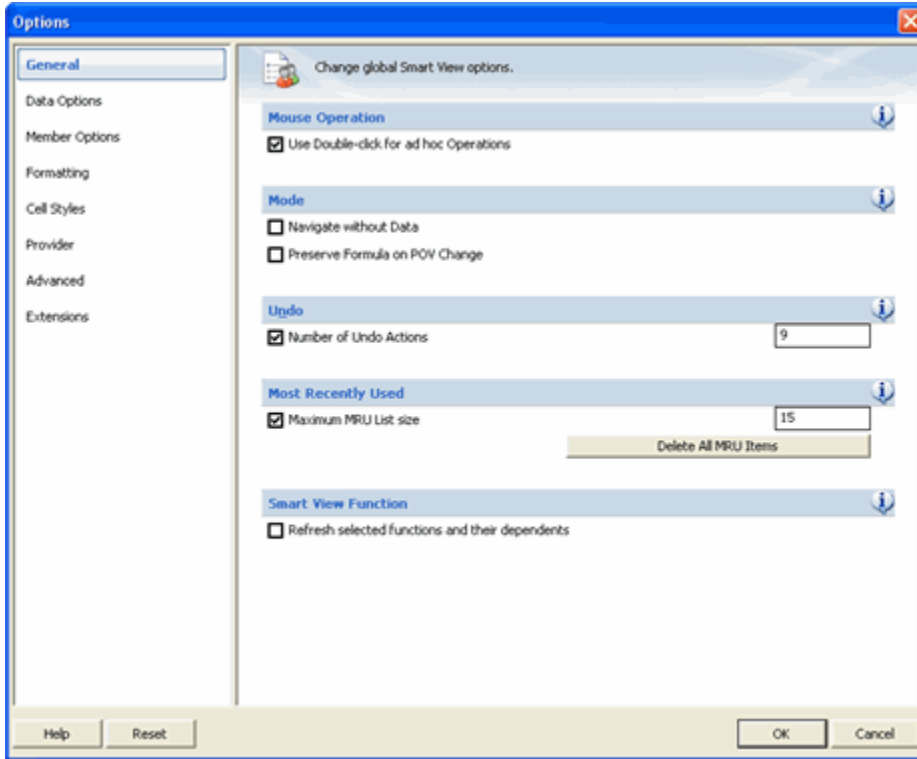
## Redesigned Options Dialog Box

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 1 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, Fusion Edition 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, Fusion Edition, Oracle Hyperion Planning, Fusion Edition, 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 Oracle Hyperion Smart View for Office, Fusion Edition 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 SmartView is connected to Shared Connections.

## EPM System New Features

- Most Oracle Hyperion 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 Hyperion 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*.



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Smart View New Features, 11.1.2

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