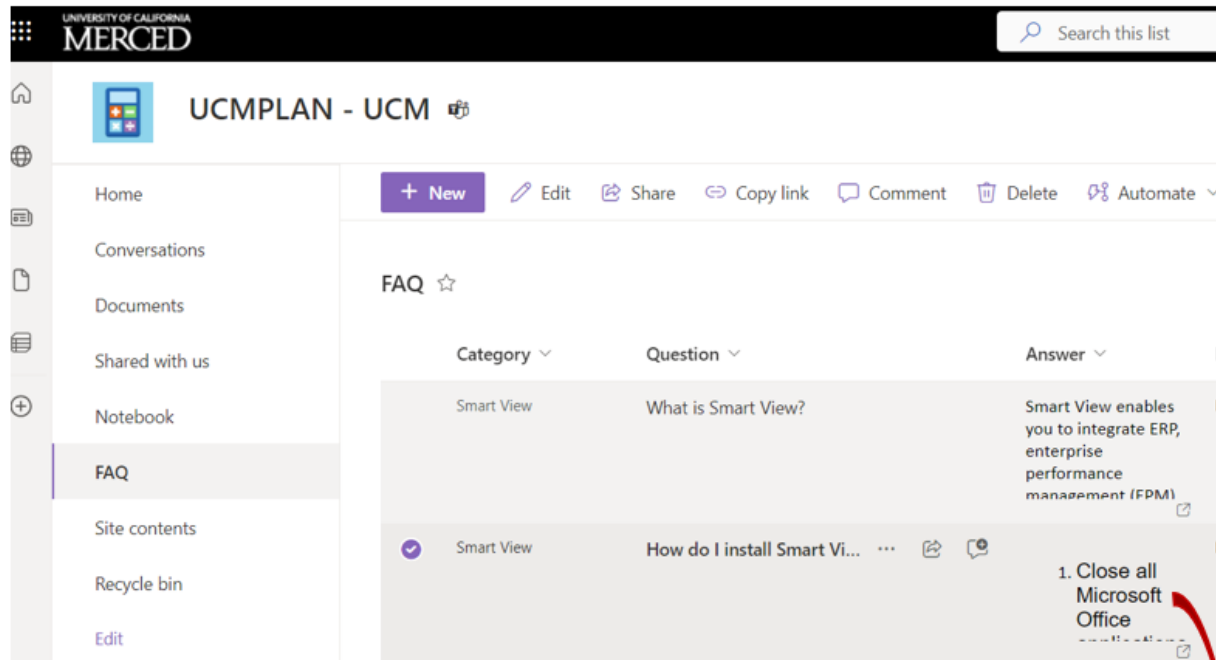


SmartView Installation / Upgrade to Latest Version

SharePoint Link for SmartView Installation/Version Update:

<https://merced.sharepoint.com/sites/UCMPLAN-UCM/Lists/FAQ/AllItems.aspx>

Second item in FAQ is the SmartView Installation guide.



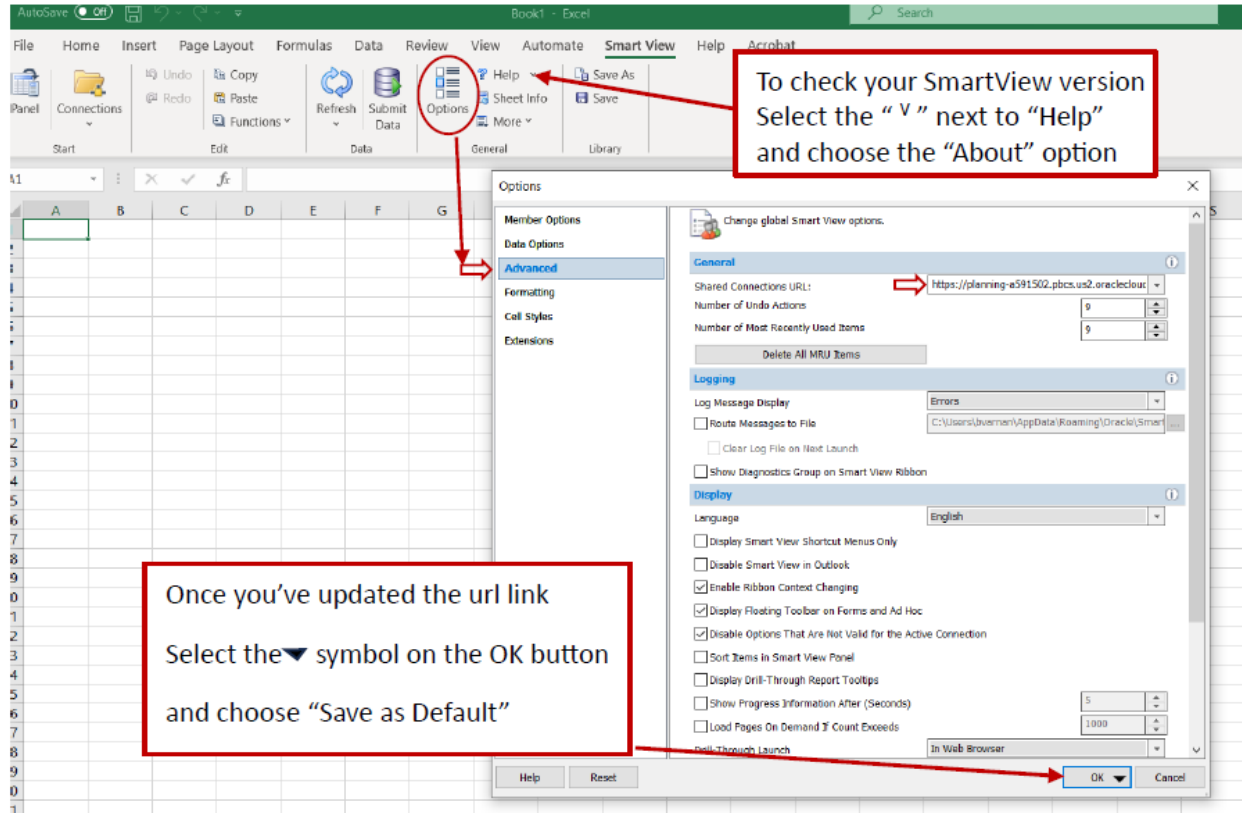
1. Close all Microsoft Office applications including Outlook
2. Save the zip file, and then unzip it to a temporary location.
3. To start the installation wizard, in the temporary location from the previous step, right-click SmartView.exe and select Run as administrator. ~~You may also double-click SmartView.exe to start the installation wizard, however,~~ some configurations may require Run as administrator. Therefore, Oracle recommends using the Run as administrator command to ensure that all functionality is properly enabled and all required Windows Registry entries are set.
4. Select a destination folder for Smart View, and then click OK.
For new installations, Smart View is installed by default in:
C:\Oracle\SmartView
If you are upgrading an existing installation of Smart View, the installer defaults to the folder where Smart View was previously installed.
5. When installation is complete, click OK.

The Smart View ribbon is displayed the next time you open Microsoft Excel, PowerPoint, or Word.

*****You must select "Run as Administrator" for SmartView to function properly in our environment**

Once you have completed the SmartView Installation or update, verify that your shared url link is correct

SmartView Installation / Upgrade to Latest Version



To check your SmartView version
Select the "v" next to "Help"
and choose the "About" option

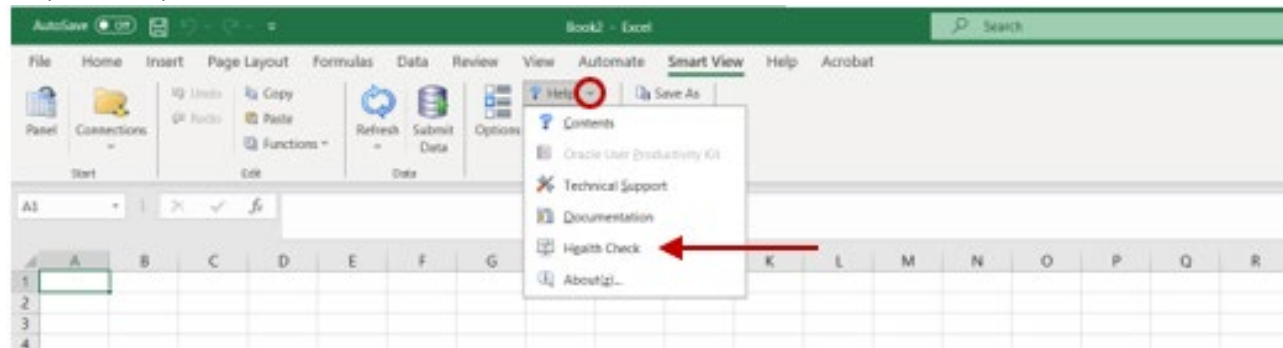
Once you've updated the url link
Select the v symbol on the OK button
and choose "Save as Default"

SmartView url for **Production UCM Plan**: <https://epmplan-ucmepm.epm.us-sanjose-1.ocs.oraclecloud.com/workspace/SmartViewProviders>

SmartView url for the EPM Re-design environment: <https://epmplan-test-ucmepm.epm.us-sanjose-1.ocs.oraclecloud.com/workspace/SmartViewProviders>

Update your timeout settings:

select the Smart View menu, click on the "v" next to the Help button, then select Health Check from the drop-down options



SmartView Installation / Upgrade to Latest Version

In the Health check window, scroll down to the Registry Information section and update the “KeepAlive Timeout” to 480000 in the column on the right. Update “Receive Timeout” to 180000, and update “Server Timeout” to 180000 also in the third column. Continue updating the values for – “Process System DPI”, “Browser Emulation”, WebView2 Runtime”, ...etc. as show in the settings below. Once you have made all the updates in the column on the right, click the “Update Setting” button on the bottom right and all your updated settings will move to the middle column.

These are the current of effective settings for these items.

Update values in this column, once you click “Update Settings” it will move these values to the middle column.

Item	Details	Fix/Update/Info
Analysis ToolPak - VBA	Inactive	
Euro Currency Tools	Inactive	
Hstbar	Active	
Solver Add-in	Inactive	
COM Add-ins		
Acrobat PDFMaker Office COM Addin	Loaded - Load at startup	May Create Conflict
Inquire	Unloaded - Load at startup	May Create Conflict
Microsoft Data Streamer for Excel	Unloaded - Load at startup	May Create Conflict
Microsoft Power Map for Excel	Unloaded - Load at startup	May Create Conflict
Microsoft Power Pivot for Excel	Unloaded - Load at startup	May Create Conflict
Oracle Smart View for Office	Loaded - Load at startup	No Impact
Registry Information		
KeepAlive Timeout	480000 second(s)	Click here to update (Enter value in seconds)
Receive Timeout	180000 second(s)	Click here to update (Enter value in seconds)
ServerInfo Timeout	180000 second(s)	Click here to update (Enter value in seconds)
Current Resolution	1920 x 1200	Not a 4K system
USER Process Handle Quota	10000	Number of user objects
Enable Per Process System DPI	Enabled	Default
Browser Emulation Mode	12001	Default
Smart View Options		
Undo Buffer	9	Enter input between 1 to 100
Improve Metadata Storage	Checked	Default
Compatibility	Enabled	Fix
WebView2 Runtime	Enabled for UI	Fix
Graphic Setting - May Cause Flickering		
Disable Window Transitions On Addin Task Panes	Enabled	Default
Disable Animations	Enabled	Default

Export To Excel Recommended Settings **Update Settings** Close

If you have any issues or concerns installing or upgrading SmartView on your machine, please contact Biju Varnan (bvarnan@ucmerced.edu) or (214) 676-4954

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A browser add-on is required for full functionality of the SmartView drill through functionality. It is recommended that users refrain from using the Mozilla Firefox browser. Google Chrome is the recommended browser for problem-free SmartView functionality. The browser add-on can be downloaded from: https://docs.oracle.com/en/applications/enterprise-performance-management/smart-view/20.100/nstsv/browser_add_on_requirement_100xeeb0c08a.html

The screenshot shows a web browser window with the URL [docs.oracle.com/en/applications/enterprise-performance-management/smart-view/20.100/nstsv/browser_add_on_requirement_100...](https://docs.oracle.com/en/applications/enterprise-performance-management/smart-view/20.100/nstsv/browser_add_on_requirement_100xeeb0c08a.html). The page title is "Installation and Configuration Guide" and the main heading is "Installing Browser Add-ons".

You can use Oracle Smart View for Office to interact with web browser applications, such as Financial Consolidation and Close or Oracle Hyperion Planning, in two ways:

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

If your default browser is Microsoft Internet Explorer, drill-through and web launch are fully supported and require no additional add-on. However, note that starting with Oracle Enterprise Performance Management System Release 11.2.2 and the Oracle Enterprise Performance Management Cloud 20.09 update, Internet Explorer is no longer supported.

If your default browser is Mozilla Firefox, Google Chrome, or Microsoft Edge, you'll require a Smart View add-on for drill-through and web launch.

Table 2-2 summarizes the browser add-on requirements.

Table 2-2 Browser Add-on Requirements for Drill-Through and Web Launch

Browser	Add-on Required?
Mozilla Firefox	Yes
Google Chrome	Yes
Microsoft Edge	Yes
Microsoft Internet Explorer	No

Note: Starting with EPM System Release 11.2.2 and the EPM Cloud 20.09 update, Internet Explorer is no longer supported.

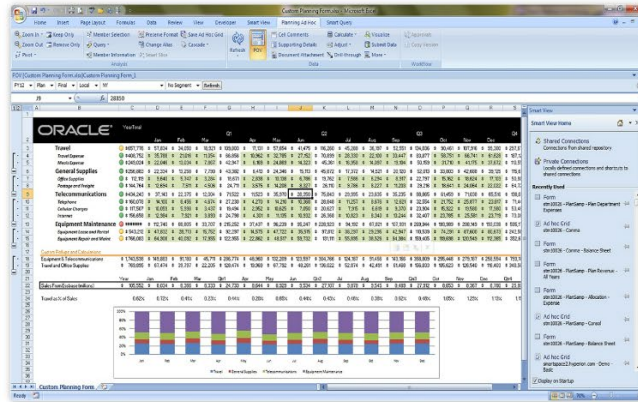
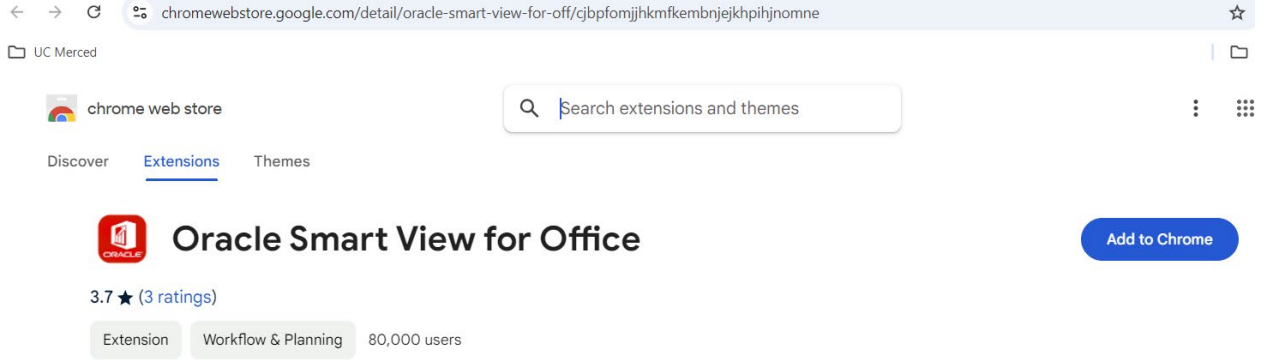
For instructions on obtaining and installing the add-on for Firefox, Chrome, and Edge, see:

- [Mozilla Firefox](#)
- [Google Chrome](#)
- [Microsoft Edge](#)

Select the Add-on for Google Chrome: <https://chrome.google.com/webstore/detail/oracle-smart-view-for-off/cjbpfomjjhkmfkembnjejkhpihjnme>

Once on the Extension website, select the "Add to Chrome" button

SmartView Installation / Upgrade to Latest Version



Overview

Show Oracle Smart View content. Supports Smart View 23.210 or later

If you open Oracle EPM applications in browser from MS Office documents containing Oracle Smart View data or vice versa, you need this extension. It serves as a pass-through mechanism for sending OLAP queries and reporting data between Oracle Smart View and browsers. Oracle Smart View for Office needs to be installed on the user's machine. No configuration or direct user interaction is required.

Then, select "Add extension"

