SharePoint Link for SmartView Installation/Version Update: <u>https://merced.sharepoint.com/sites/UCMPLAN-UCM/Lists/FAQ/AllItems.aspx</u>

Second item in FAQ is the SmartView Installation guide.

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	1.	Close all Microsoft Of	ice ap	plicat	ions inc	luding C	utlool	k					
	2.	Save the zip file, and t	hen u	nzip it	to a ter	nporary	locati	ion.					
	3.	To start the installatio SmartView.exe and <u>se</u> start the installation w Therefore, Oracle reco functionality is proper and all required Wind	n wiza <u>lect R</u> vizard; omme ly ena ows R	und, in <u>un as</u> howe nds us bled egistry	the ten <u>adminis</u> ever, son sing the y entries	nporary <u>trator</u> . me conf Run as s are set	locatio You m gurati admin	on from ay also ions ma istrator	n the previ double-cl ay require comman	ous st ick Sm Run a: d to er	ep, <u>rig</u> artVie s adm nsure t	g <u>ht-click</u> sw.exe to inistrator. that all	
	4.	Select a destination for For new installations, C:\Oracle\SmartView If you are upgrading a where Smart View wa	lder fo Smart n exist s prev	or Sma View ting in iously	art View is instal stallatic installe	r, and th led by d on of Sm d.	en clic efault art Vie	ck OK. : in: ew, the	installer o	lefault	ts to ti	he folder	
	5.	When installation is co	omple	te, clio	ck OK.								
		The Smart View ribbo or Word.	n is dis	playe	ed the ne	ext time	you o	pen Mi	crosoft Ex	cel, Po	owerP	oint,	
***	You	must select "Run as A	dmin	istrat	or" for	SmartV	<mark>ew to</mark>	o functi	on prope	r <mark>ly in c</mark>	our er	vironmen	t

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

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File Home Insert Page Layout Formulas Data Review V	iew Automate Smart View	Help Accobat
Panel Connections Start Edit Data 6	P Help → □ Save As Sheet Info More → Hore →	To check your SmartView version Select the " ^V " next to "Help" and choose the "About" option
41 ° i × √ fr	Options	×
A B C D E F G 1 -	Member Options Data Options Advanced Formatting Call Stylas Extensions	Ceneral Ceneral Caneral Ca
7		Display Smart View Shortcut Menus Only
9 Once you've updated the u	ırl link	Disable Smart View in Outlook Enable Ribban Cantext Changing Displey Rosting Toolbar on Forms and Ad Hoc
² 3 Select the▼ symbol on the	OK button	Disable Options That Are Not Vaild for the Active Connection Soft Items in Smart View Ponel Display Drill-Through Report Tooltips
and choose "Save as Defau	lt″	Show Progress Information After (Seconds) 5 ↓ □ Lood Pages On Demand 3 Count Exceeds 1000 ↓ □ bell Afteruch Laurch In Web Browser ✓
9 0	Help Reset	OK 🗸 Cancel

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

SmartView url for the EPM Re-design environment: <u>https://epmplan-test-ucmepm.epm.us-</u>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

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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.

ese are the current effective settings		Update values in this column, o click "Update Settings" it will m	once love
r these items.		these values to the middle colu	mn.
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Health Check			×
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Inquire	Unloaded - Load at startun	May Create Conflict	- 1
Microsoft Data Streamer for Excel	Unloaded - Load at startup	May Create Conflict	- 1
Microsoft Power Map for Excel	Unloaded - Load at startup	May Create Conflict	- 11
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	

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

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: <u>https://docs.oracle.com/en/applications/enterprise-performance-management/smart-view/20.100/nstsv/browser_add_on_requirement_100xeeb0c08a.html</u>

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$\leftarrow \rightarrow$	G	°	$docs.oracle.com/en/applications/enterprise-performance-management/smart-view/20.100/nstsv/browser_add_on_requirement_10$	☆

ж	Installing Browser Add	d-ons
;= ;=	You can use Oracle Smart View for Office to in Close or Oracle Hyperion Planning, in two way	nteract with web browser applications, such as Financial Consolidation and ys:
:≡ ↓	 Starting in a form or ad hoc grid in Sma Starting in a web application, launch a for 	rt View, use drill-through to launch an application web page in a browser orm or ad hoc grid in Smart View for Excel.
Å	If your default browser is Microsoft Internet E additional add-on. However, note that startin and the Oracle Enterprise Performance Mana	xplorer, drill-through and web launch are fully supported and require no g with Oracle Enterprise Performance Management System Release 11.2.2 gement Cloud 20.09 update, Internet Explorer is no longer supported.
	If your default browser is Mozilla Firefox, Goo, through and web launch.	gle Chrome, or Microsoft Edge, you'll require a Smart View add-on for drill-
	Table 2-2 summarizes the browser add-on re	quirements.
	Table 2-2 Browser Add-on Requirements for	r Drill-Through and Web Launch
	Table 2-2 Browser Add-on Requirements for Browser	r Drill-Through and Web Launch Add-on Required?
	Browser Add-on Requirements for Mozilla Firefox Mozilla Firefox	r Drill-Through and Web Launch Add-on Required? Yes
	Table 2-2 Browser Add-on Requirements for Browser Mozilla Firefox Google Chrome Google Chrome	r Drill-Through and Web Launch Add-on Required? Yes Yes Yes
	Table 2-2 Browser Add-on Requirements for Browser Mozilla Firefox Google Chrome Microsoft Edge	Add-on Required? Yes Yes Yes Yes
	Browser Add-on Requirements for Mozilla Firefox Image: Chrome Microsoft Edge Image: Chrome Microsoft Internet Explorer Image: Chrome	Add-on Required? Add-on Required? Yes Yes Yes No Note: Starting with EPM System Release 11.2.2 and the EPM Cloud 20.09 update, Internet Explorer is no longer supported.
	Table 2-2 Browser Add-on Requirements for Browser Mozilla Firefox Mozilla Firefox Google Chrome Microsoft Edge Microsoft Internet Explorer For instructions on obtaining and installing the second sec	No No No No Note: Starting with EPM System Release 11.2.2 and the EPM Cloud 20.09 update, Internet Explorer is no longer supported.
	Table 2-2 Browser Add-on Requirements for Browser Mozilla Firefox Mozilla Firefox Google Chrome Microsoft Edge Microsoft Internet Explorer For instructions on obtaining and installing the obtaining	No Note: Starting with EPM System Release 11.2.2 and the EPM Cloud 20.09 update, Internet Explorer is no longer supported. ne add-on for Firefox, Chrome, and Edge, see:
	Table 2-2 Browser Add-on Requirements for Browser Mozilla Firefox Mozilla Firefox Microsoft Edge Microsoft Edge Microsoft Internet Explorer For instructions on obtaining and installing the second se	r Drill-Through and Web Launch Add-on Required? Yes Yes Yes Yes No Image: PM Cloud 20.09 update, Internet Explorer is no supported. Yes Yes Add-on Required? Yes Yes <t< td=""></t<>

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

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



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"

