GEN-12 Accessing and Installing Smart View

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide step-by-step instructions on how to access and install the North Carolina Financial System (**NCFS**) Microsoft (MS) Excel Smart View plug-in.

Introduction and Overview

Smart View is an Excel plug-in with the capability to utilize additional functionality in an Excel spreadsheet to manage the NCFS Financial Reporting Studio (FRS) reports for the annual reporting process. Smart View has a variety of capabilities available to users to assist in making the analysis as efficient as possible. Users can zoom in to see specific details of statements as well as customize the view of the Excel spreadsheet.

Key Terms

Key Terms and Acronyms	Description
Smart View	Microsoft Excel plug-in that allows users to view, import and manipulate data from FRS reports.

Information to Complete This Process

- Smart View plug-in file

Outputs of This Process

- Smart View installed in Excel

Accessing the Smart View Plug-In

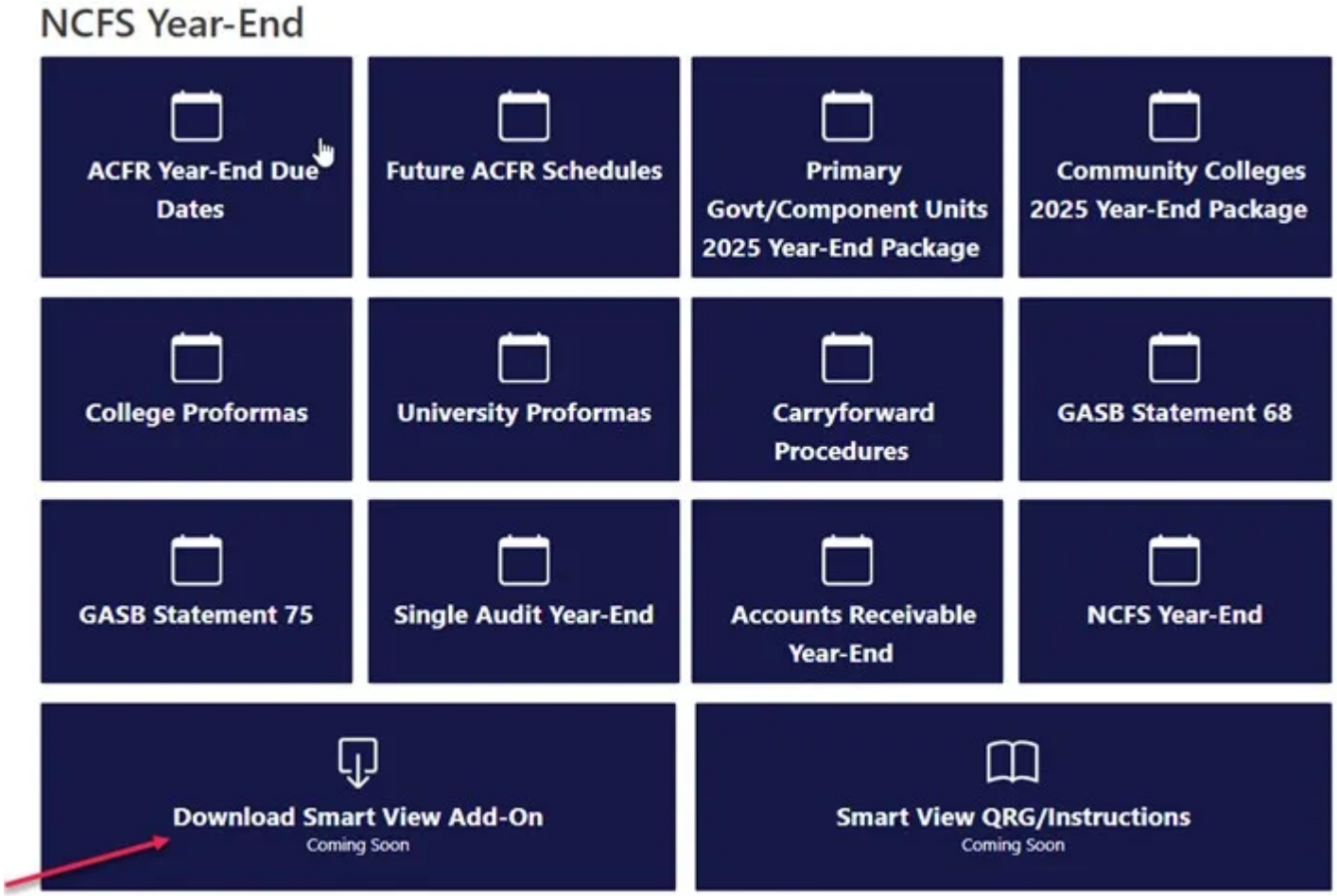
To download the Smart View plug-in, please follow the steps below. There are 3 steps to complete this process.

Step 1. Access the NCFS Year-End page on the OSC website.

Step 2. Click the **Download Smart View Add-On** tile.

Step 3. Download the file.

Image



User Tip

Close all Microsoft Office applications before installing Smart View.

Installing the Smart View Plug-In

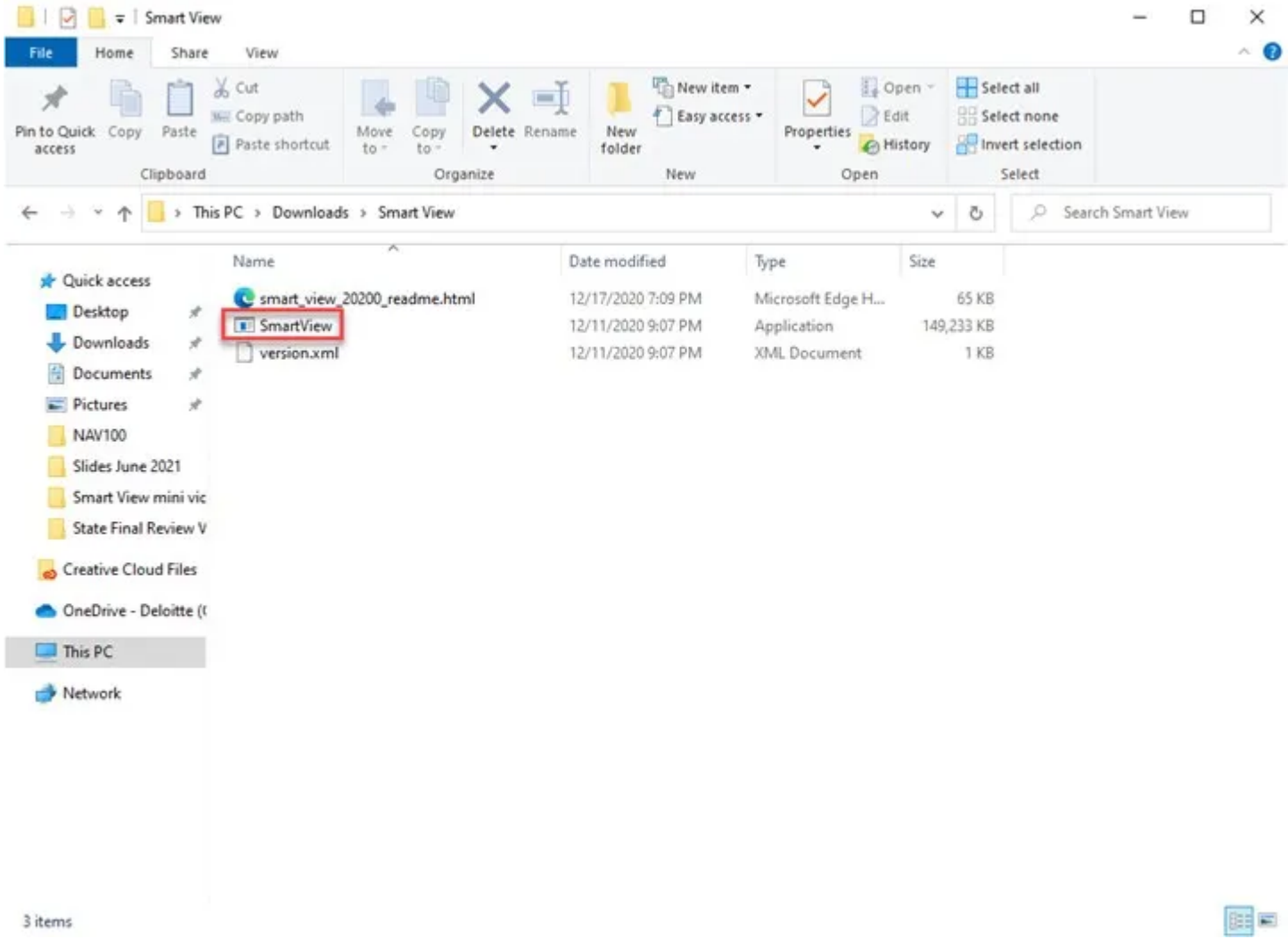
To install the Smart View plug-in, please follow the steps below. There are 10 steps to complete this process.

Step 1. **Close all Microsoft Office applications**. This includes: Excel, Word, Outlook, and PowerPoint.

Step 2. Download the files.

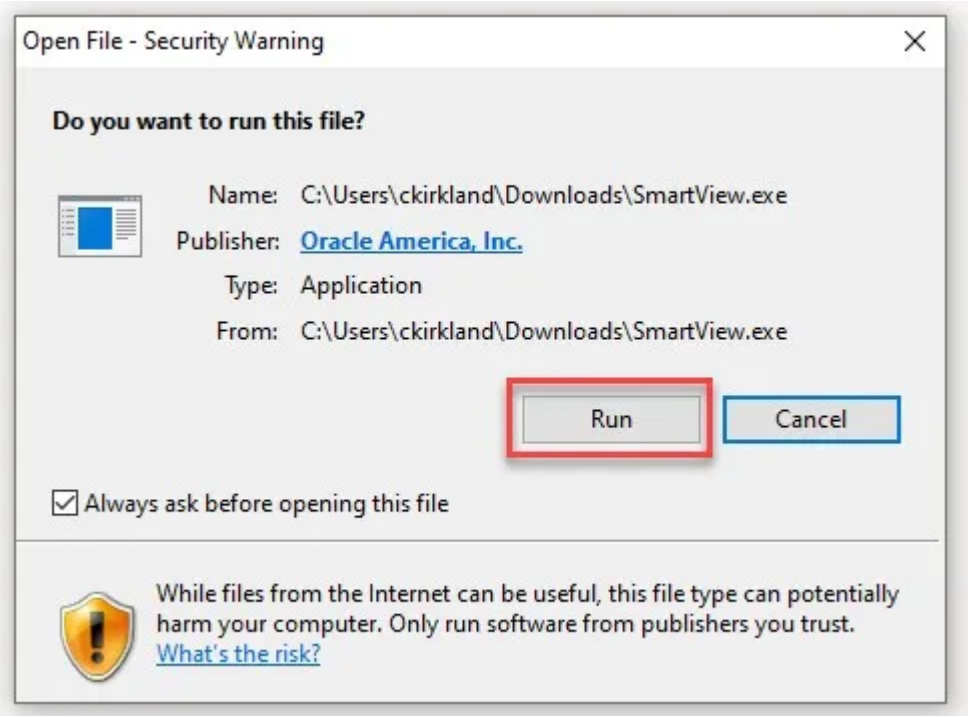
Step 3. After downloading the files, click the **Smart View** file.

Image



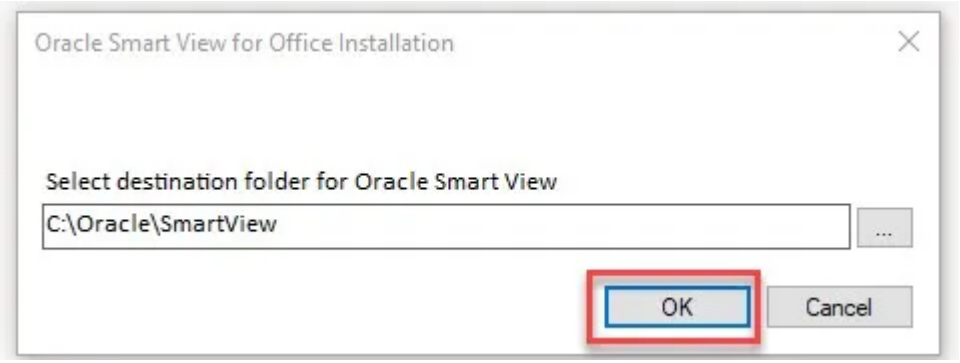
Step 4. Click **Run** at the *Open File – Security Warning* pop-up.

Image



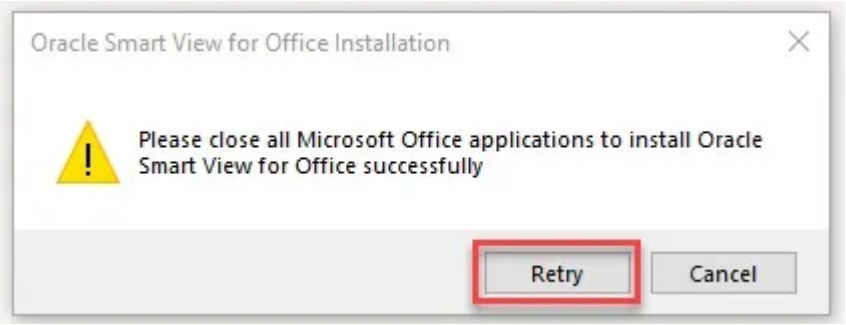
Step 5. Click **OK** to continue the installation.

Image



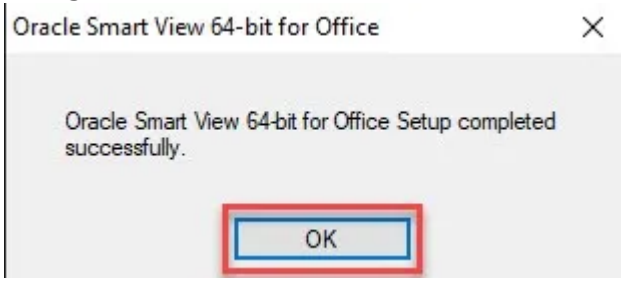
Step 6. If all Microsoft Office applications have not been closed, the pop-up below will appear. Close all Microsoft Office applications and click **Retry**.

Image



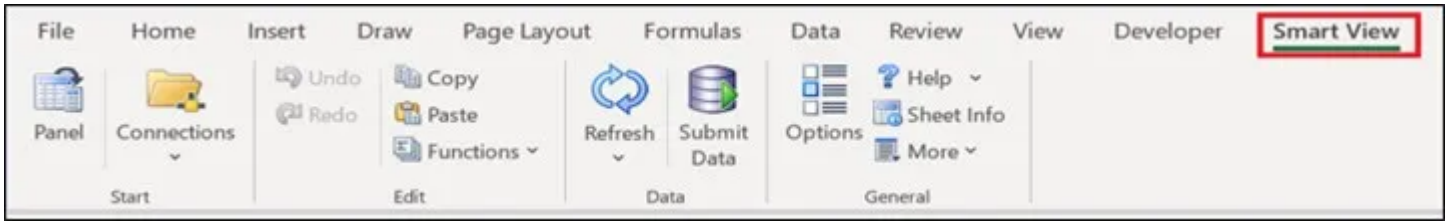
Step 7. After Smart View finishes installing, click **OK**.

Image



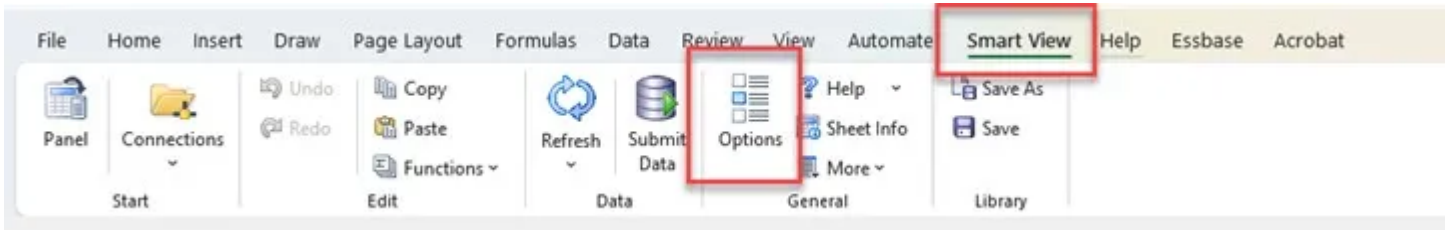
Step 8. Open **Microsoft Excel** and see the Smart View tab in the ribbon to verify the installation was successful.

Image



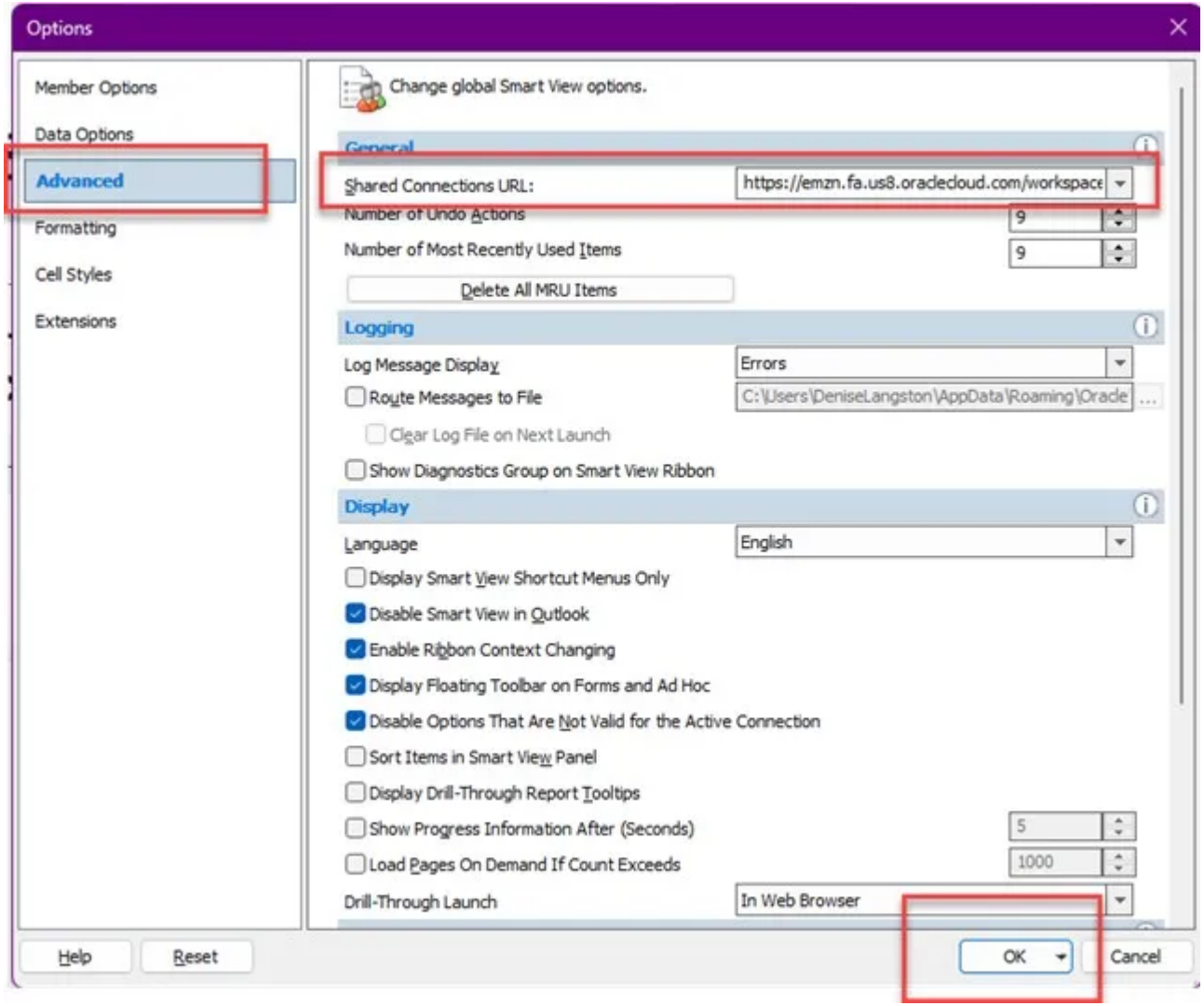
Step 9. Click **Options** on the *Smart View* tab to make a connection to NCFS.

Image



Step 10. Click on **Advanced** to update the Shared Connections URL: to https://emzn.fa.us8.oraclecloud.com/workspace/SmartViewProviders. Then click **OK**.

Image



Wrap Up

Users can download Smart View from the NC OSC's website. After downloading, users must close out of all Microsoft Office applications and then install Smart View to their computer. After it has been installed, access

Microsoft Excel to view the Smart View tab. Determine If the Smart View tab is available and installed successfully. Make a connection to NCFS.

Additional Resources

- Web Based Training (WBT)
  - SV100: Overview of Smart View
  - SV200: NCFS Smart View Capabilities – Options Feature
  - SV201: NCFS Smart View Capabilities – Ad Hoc Analysis Feature
  - SV202: NCFS Smart View Capabilities – Keep Only & Remove Only Feature
  - SV203: NCFS Smart View Capabilities – Zoom In & Out Feature
  - SV204: NCFS Smart View Capabilities – Dimension Members Feature
  - SV205: NCFS Smart View Capabilities – Mathematical Calculations Feature
- Quick Reference Guides (QRGs)
  - GEN13 - Accessing Smart View and Establishing a Connection

First Published

Mon, 06/30/2025

Last Updated

Tue, 08/26/2025
Printable PDF