GEN-13 Accessing Smart View and Establishing a Connection

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide step-by-step instructions on establishing a connection using Smart View for NC Financial System (**NCFS**) reporting.

Note: **This QRG should only be used to reconnect a saved spreadsheet to the data source. It is not necessary for initial set-up nor to pull reports from NCFS.**

Introduction and Overview

Smart View is an Excel plug-in that provides the capability to analyze financial reports housed the Financial Reporting Studio (FRS) folder in NCFS using an Excel spreadsheet. Smart View has a variety of capabilities available to assist users in making the analysis as efficient as possible. In Smart View, users can establish either a shared or private connection. Shared connections are used in cases where users need to access data from NCFS. Shared connections are used in a majority of cases.

Key Terms

Key Term	Description
Smart View	Smart View is a Microsoft Office plug-in that enables users to view, import, analyze, and share data from a data source.

Key Term	Description
Shared Connection	Shared Connections allows users to connect Excel to NCFS to perform an analysis on data.
Private Connection	Private Connections are used mainly to access Smart View reports. Users can access a private connection to connect to a specific report and then make changes to the data, as needed.

Information Needed to Complete This Process

- Database URL

Outputs of This Process

- Smart View is connected to the database

Establishing a Shared Connection

To establish a shared connection, follow the steps below. There are 8 steps to complete this process.

Step 1. Open Microsoft Excel and click the **Smart View** ribbon, then click **Panel**.

Image



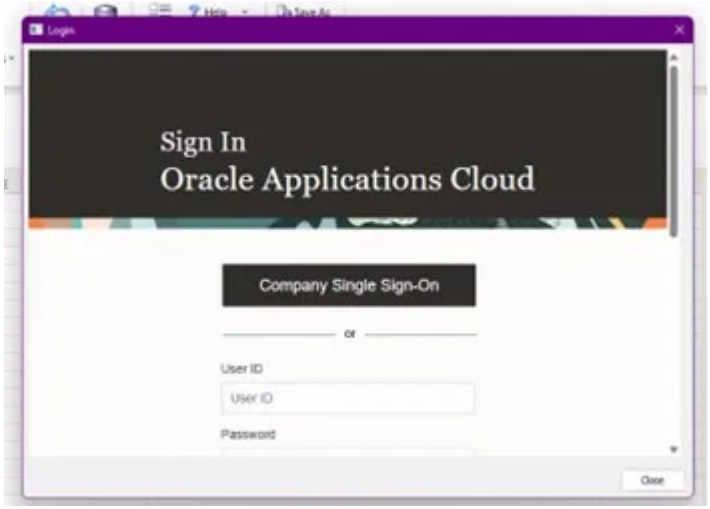
Step 2. From the panel on the right, click **Shared Connections**.

Image



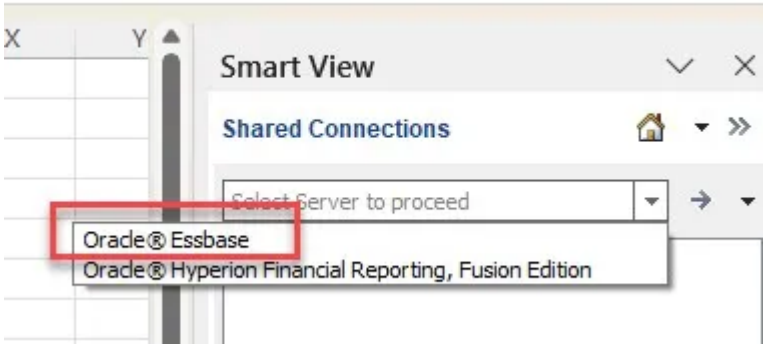
Step 3. Login by selecting the **Company Single Sign-On**, using your username and password.

Image



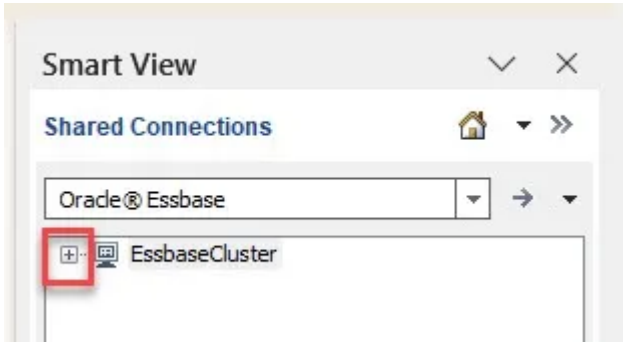
Step 4. In the text box, click the drop down next to the select server to proceed and choose **Oracle® Essbase**.

Image



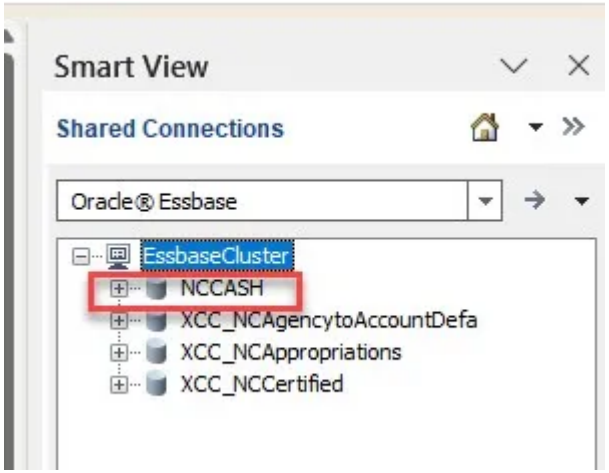
Step 5. Click the **Plus** sign that is in front of the **ESSbaseCluster**.

Image



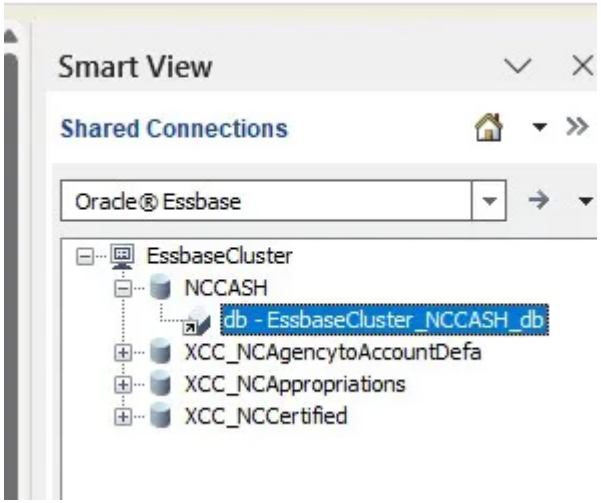
Step 6. Click the **Plus** sign that is in front of **NCCASH**.

Image



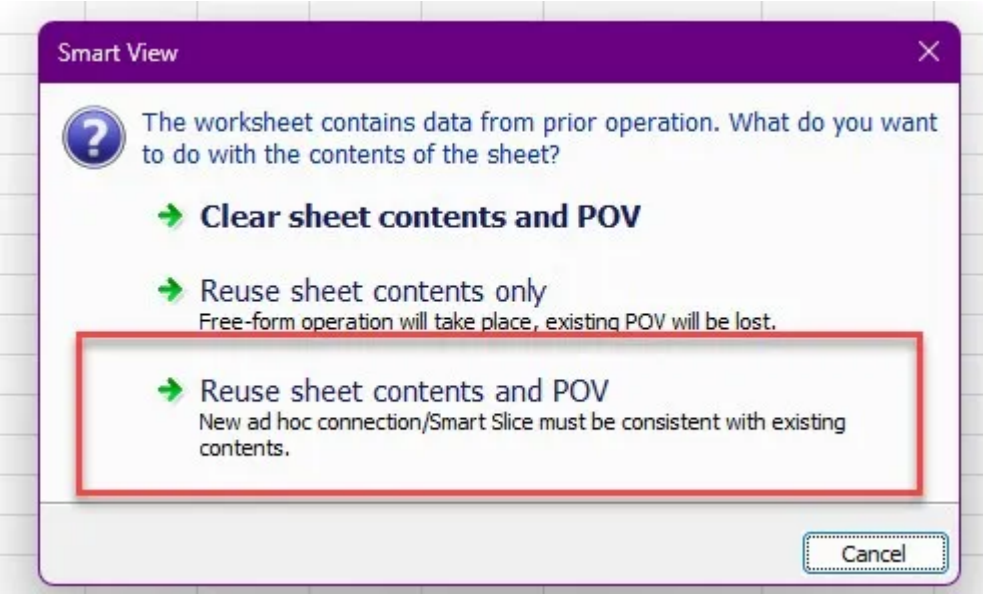
Step 7. Double click **db-EssbaseCluster_NCCASH_db**. Note: Selection may only say **db/**.

Image



Step 8. Select **Reuse sheet contents and POV**.

Image



Wrap Up

After the connection is established, users can then begin to run their analysis on the data.

Additional Resources

For more information on Journal Entries please review the following materials:

- 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)
    - GEN12 - Accessing and Installing Smart View

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