

ACCESSING & INSTALLING SMART VIEW QUICK REFERENCE GUIDE GEN-12



#### 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.

### 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.

- 1. Access the <u>NCFS Year-End page</u> on the OSC website.
- 2. Click the Download Smart View Add-On tile.
- 3. Download the file.



| Nero rear Ena              |                              |  |   |
|----------------------------|------------------------------|--|---|
| ACFR Year-End Due<br>Dates | Future ACFR Schedules        | Primary<br>Govt/Component Units<br>2025 Year-End Package | Community Colleges<br>2025 Year-End Package |
| College Proformas          | University Proformas         | Carryforward<br>Procedures                               | GASB Statement 68                           |
| GASB Statement 75          | Single Audit Year-End        | Accounts Receivable<br>Year-End                          | NCFS Year-End                               |
| Download Smar<br>Coming    | )<br>t View Add-On<br>J Soon | Smart View QF  | G/Instructions<br>g Soon                    |

NCFS Year-End



1



## Installing the Smart View Plug-In

To install the Smart View plug-in, please follow the steps below.

- 1. Close all Microsoft Office applications. This includes: Excel, Word, Outlook, and PowerPoint.
- 2. Download the files.
- 3. After downloading the files, click the **Smart View** file.

| I     Image: Second state       File     Home       Share  | v<br>View   |                                    |                      |  |                             |  |                 |                         |  | - 0           | ×<br>^ 0 |
|--|---|------------------------------------|----------------------|--|-----------------------------|--|-----------------|-------------------------|--|---------------|----------|
| Pin to Quick Copy Paste Clipboard  | Cut<br>Copy path<br>Paste shortcut                  | ove Copy Delet<br>to *<br>Organize | e Rename             | New<br>Folder<br>New   | w item •<br>y access •      | Properties                                       | Edit<br>History | Sele                    | ect all<br>ect none<br>ert selection<br>ielect |               |          |
| $\leftrightarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\blacksquare$ $\rightarrow$ This  | s PC > Downloads >                                  | Smart View                         |                      |  |                             |  | ~               | ō                       | , Sear   | th Smart View |          |
| Quick access Desktop * Downloads * Documents * Pictures * NAV100 Slides June 2021 Smart View mini vic State Final Review V Creative Cloud Files OneDrive - Deloitte (f This PC Network | Name<br>smart_view_2020<br>SmartView<br>version.xml | 0_readme.html                      | D.<br>12<br>12<br>12 | Rate modified<br>2/17/2020 7:09 PM<br>2/11/2020 9:07 PM<br>2/11/2020 9:07 PM | Ту/<br>1 Мл<br>1 Ар<br>1 ХМ | pe<br>icrosoft Edge<br>aplication<br>ML Document | Size<br>H<br>t  | 65 KB<br>233 KB<br>1 KB |  |               |          |
| 3 items  |   |                                    |                      |  |                             |  |                 |                         |  |               |          |



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

| Open File - S | Security Warni   | ing  | ×   |
|---------------|--|--|-----|
| Do you w      | ant to run th  | is file?   |     |
|               | Name:<br>Publisher:<br>Type:<br>From:                    | C:\Users\ckirkland\Downloads\SmartView.exe<br><u>Oracle America, Inc.</u><br>Application<br>C:\Users\ckirkland\Downloads\SmartView.exe<br><u>Run</u> Cancel      |     |
| 🗹 Alway       | s ask before o   | pening this file   |     |
|               | While files fro<br>harm your co<br><u>What's the ris</u> | om the Internet can be useful, this file type can potentia<br>omputer. Only run software from publishers you trust.<br><a href="https://www.sefulto.com">skf</a> | lly |

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

| Oracle Smart View for Office Installat | ion          |    | $\times$ |
|--|--------------|----|----------|
| Select destination folder for Oracl    | e Smart View |    |          |
| C:\Oracle\SmartView                    |              |    |          |
|  |              | ОК | Cancel   |

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





7. After Smart View finishes installing, click OK.



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

| File  | Home        | Insert D            | oraw Page Layo                       | out Formulas | Data Review     | View | Developer | Smart View |
|-------|-------------|---------------------|--------------------------------------|--------------|-----------------|------|-----------|------------|
| Panel | Connections | යි Undo<br>අපි Redo | Copy<br>Copy<br>Paste<br>Conctions * | Refresh<br>* | Options Phelp ~ | fo   |           |            |
|       | Start       |                     | Edit                                 | Data         | General         |      |           |            |

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





# 10. Click on Advanced to update the Shared Connections URL: to

https://emzn.fa.us8.oraclecloud.com/workspace/SmartViewProviders. Then click OK.

| lember Options | Change global Smart View options                                      |   |                        |  |  |  |  |  |  |
|----------------|---|---|------------------------|--|--|--|--|--|--|
| Data Options   |   |   | 0                      |  |  |  |  |  |  |
| thorney        |   | https://www.found.com/                      |                        |  |  |  |  |  |  |
| uvanceu        | Shared Connections URL:   | nttps://emzn.ra.uss.orade                   | ecloud.com/workspace + |  |  |  |  |  |  |
| ormatting      | Number of Most Recently Used Items                                    |   | 9                      |  |  |  |  |  |  |
| ell Styles     | Delete All MRU Items  | Delete All MRU Items                        |                        |  |  |  |  |  |  |
| xtensions      | Logging   | Longing                                     |                        |  |  |  |  |  |  |
|                | Log Message Display   | Errors                                      |                        |  |  |  |  |  |  |
|                | Route Messages to File  | C: Users DeniseLangston                     | AppData\Roaming\Oracle |  |  |  |  |  |  |
|                | Clear Log File on Next Launch   | Clear Loo Ele on Next Launch                |                        |  |  |  |  |  |  |
|                | Show Diagnostics Group on Smart Vie                                   | Show Disponetice Grown on Smart View Rithon |                        |  |  |  |  |  |  |
|                | Dicolay   | (î  |                        |  |  |  |  |  |  |
|                | Lagrage   | English                                     |                        |  |  |  |  |  |  |
|                | Dieday Smart View Shorts it Marcin (                                  | Lingish                                     |                        |  |  |  |  |  |  |
|                | Display Smart View Shortcut Herus C     Display Smart View in Outlook | лиу   |                        |  |  |  |  |  |  |
|                | Stable Shart view in Outdook  |   |                        |  |  |  |  |  |  |
|                | Context Changing  | 1111-                                       |                        |  |  |  |  |  |  |
|                | Display Floating Toolbar on Forms an                                  | a Ad Hoc                                    |                        |  |  |  |  |  |  |
|                | Disable Options That Are Not Valid fo                                 | r the Active Connection                     |                        |  |  |  |  |  |  |
|                | Sort Items in Smart View Panel  |   |                        |  |  |  |  |  |  |
|                | Display Drill-Through Report Tooltips                                 | 6.67  |                        |  |  |  |  |  |  |
|                | Show Progress Information After (Se                                   | conds)                                      | 5 🗘                    |  |  |  |  |  |  |
|                |   |   |                        |  |  |  |  |  |  |
|                | Load Pages On Demand If Count Exc                                     | reeds                                       | 1000                   |  |  |  |  |  |  |

# 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

For more information on Smart View 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

## Instructor Led Training (ILT)

• None

## Quick Reference Guides (QRGs)

Accessing Smart View and Establishing a Connection

