# 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



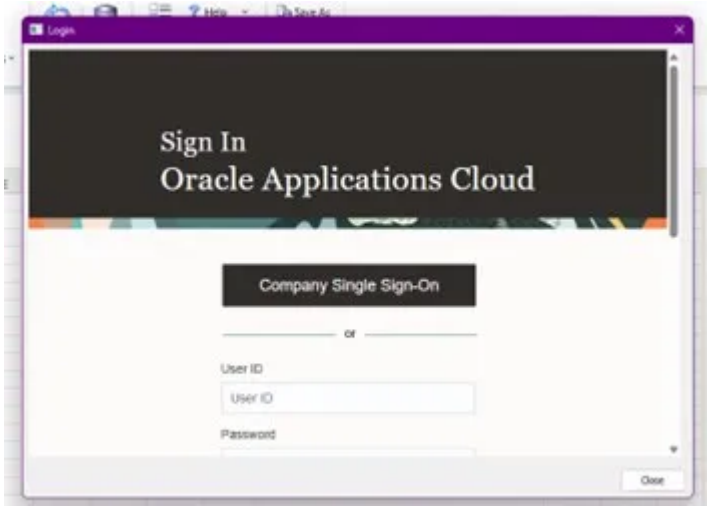
Step 2. From the panel on the right, click **Shared Connections**.

Image



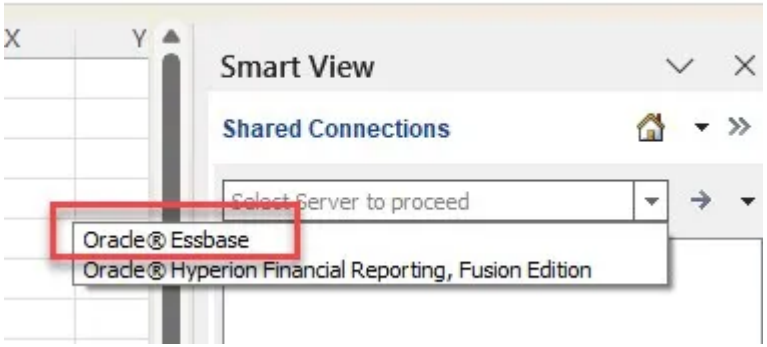

Step 3. Login by selecting the **Company Single Sign-On**, using your username and password.

Image



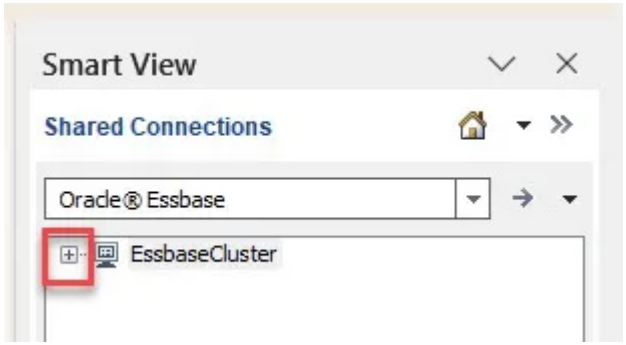

Step 4. In the text box, click the drop down next to the select server to proceed and choose **Oracle® Essbase**.

Image



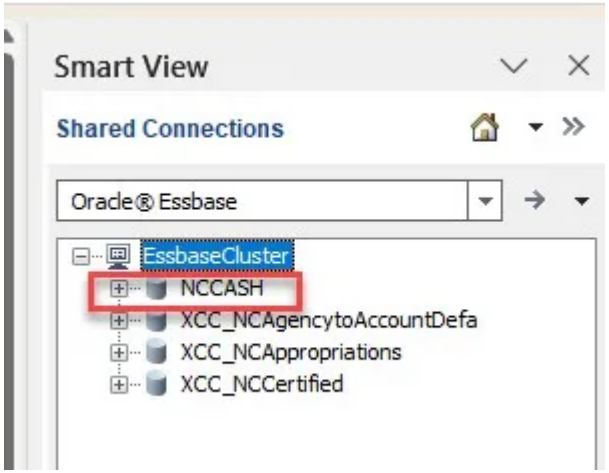

Step 5. Click the **Plus** sign that is in front of the **ESSbaseCluster**.

Image



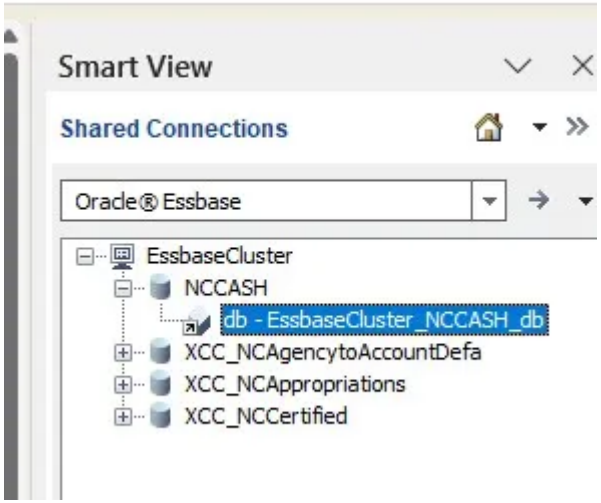

Step 6. Click the **Plus** sign that is in front of **NCCASH**.

Image



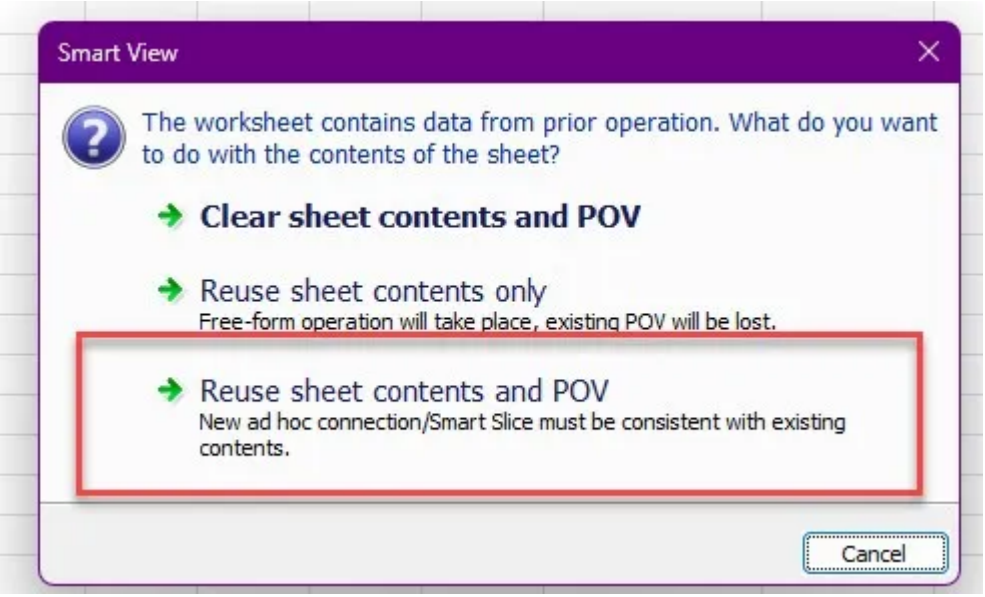

Step 7. Double click **db-EssbaseCluster_NCCASH_db**. Note: Selection may only say **db/**.

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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