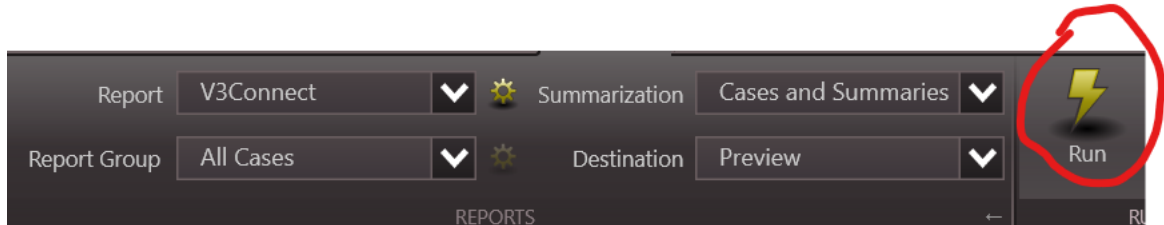
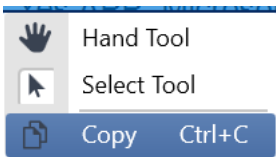


Setup V3ForecastConnect

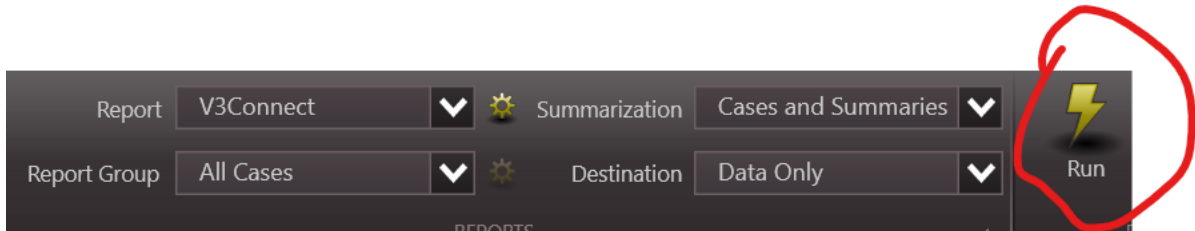
1. Run the V3Connect report with the “Preview” option in the drop down for Destination:



2. When the report window pops up at the bottom it should say:
The Connection String for this SQL Instance is below
3. Copy the block of text below those words onto your clipboard by highlighting it and clicking copy. Leave the Report Window open until you are done with Step 14.



4. Make sure you are now in the correct scenario. The correct scenario will have the Projection Qualifier you want to edit as the primary projection qualifier.
5. Rerun the V3Connect report for All Cases again, this time with “Data Only” as the Destination:



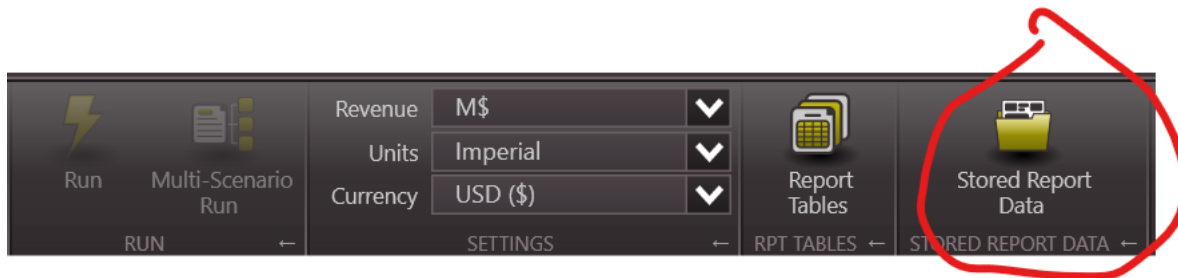
6. In the prompt that comes up give any label for this report run that makes sense to you (will not change the result can even just be NA):

Report Description X

Enter a description used to store the data of the current report run:

NA

- When the report run is completed go to the “Stored Report Data” button further down on the report ribbon:



- When the Stored Report Data window opens grab the “Report ID” from this window (it is the left most column) and write it down:

Stored Report Data

Filters

Users: ▼

Output Type: ▼

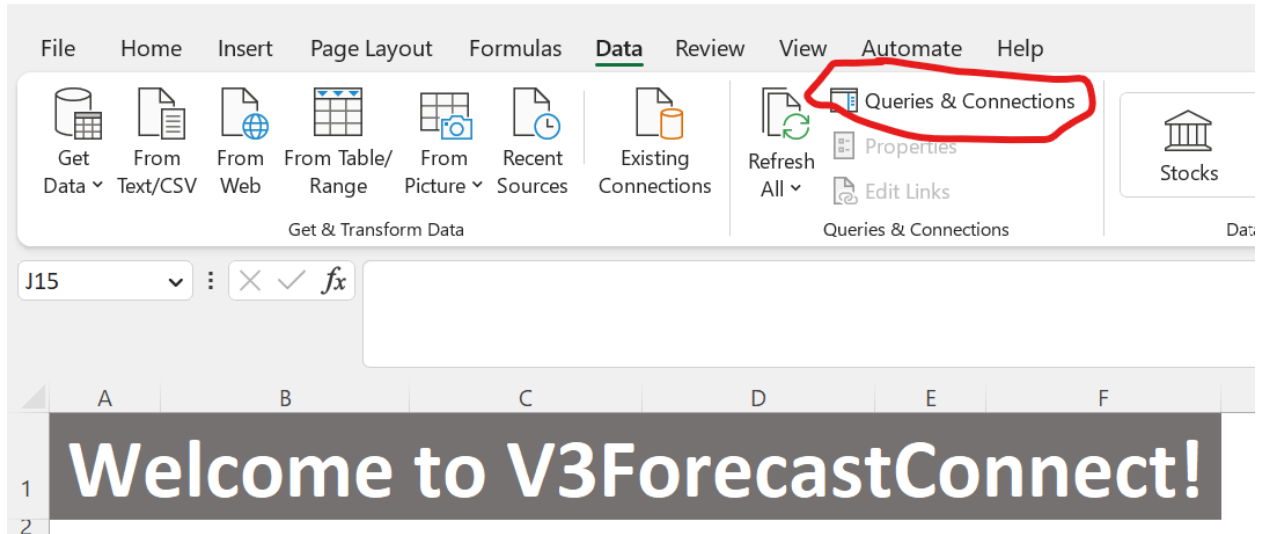
IC	USER	DESCRIPTION
4194	jsmith	NA

- Open up the V3ForecastConnect.xlsm sheet included with this zip file. Enable Macros if it asks you to. Enter the Report ID you wrote down in the last step into the “Report ID” box on the “Start Here” tab of the workbook:

Report ID

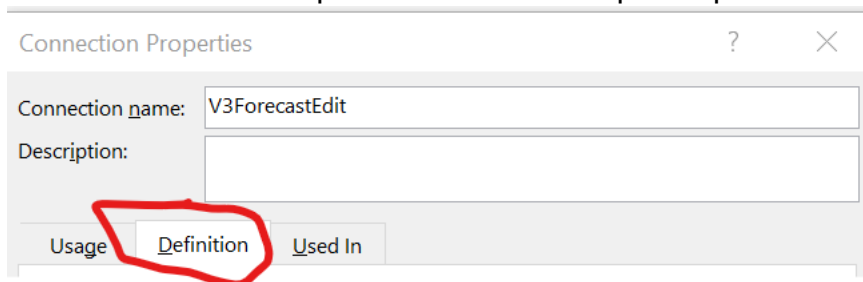
4194

10. Go to the Data ribbon in Excel and select “Queries and Connections.”



11. In what pops up make sure it is set to “Connections” not Queries. If so you should see the V3ForecastEdit connection. Right click on the V3ForecastEdit connection and then select “Properties”

12. In the Connection Properties window that opens up select the “Definition” tab:



13. On this tab find the field called “Connection string:” and paste in the text you copied from the report in step 7. Then click ok. If you get warnings double check you have the correct report ID in the Start Here tab.

14. Go to the Start Here tab and hit the green refresh button. Now follow those directions on the tab to use this spreadsheet to edit projections.

15. **Please note the rules on the Start Here page!** In particular note that changed imported projections must come to a new Qualifier (the sheet does this

automatically for you unless you change that column) and you must save the "ForecastEdit" tab as a CSV file after changes for it to import back into PHDwin.