Fact Sheet:

Custom Business Analysis Tutoring Using NGS *SmartView* Templates

What is Qport® SmartView?

SmartView, included in your NGS license, is the *NGS-IQ* module designed to visually analyze important business data such as budgets, sales, orders, payroll, inventory, shipments, or activity across dates, accounting periods, locations, service codes, and other data elements.

This powerful, Windows online analytical processing (OLAP) module transforms *NGS-IQ* query output into multidimensional, read-only presentations without requiring a database administrator or skilled consultant. *SmartView* models ensure data integrity and are significantly easier to create and work with than complex Excel spreadsheets and pivot tables, especially when you're working with large datasets.

What does the NO-COST SmartView tutoring session cover?

NGS customizes your tutoring to help new or experienced *SmartView* users quickly get up to speed. You'll receive a ready-to-use *SmartView* template to import data from your database, and an NGS tutoring specialist will walk you through all the steps to create your own *SmartView* model.

Each attendee receives a complimentary, comprehensive tutoring guide.

How much time is required?

Plan to complete your tutoring in two sessions, each lasting approximately 90 minutes. If you schedule these sessions a few days apart, your users can practice on their own before the second session.

Note for experienced SmartView users: If preferred, you can limit the steps to cover only the new release enhancements and brand-new charting module. One session of about 100 minutes should cover everything.

How do I prepare for the tutoring?

1) Before the class, install the new releases of *Qport Access* and *SmartView*. Use our "[Incident Reporting](#)" portal to contact NGS technical support for assistance with the download and install.

2) Create a new NGS query or revise an existing one. This query can be simple – there's no need to sort, add report breaks, or use report layout as *SmartView* handles these functions automatically. Select all the fields you want in *SmartView*, but no need to spend time sequencing them properly; we'll demonstrate this task in *SmartView*. The query should include:

   a. Two numeric fields (e.g., quantity or units or dollars that could represent sales totals, inventory levels, financial information, etc.)
   b. Periods of time (e.g., year, quarter, month, date). Two dates would be great, like year and month.

c. Data fields that lend themselves to a hierarchical structure – to show summary data and then the drill-down to detail data (e.g., sales or revenue by division; region or customer; period of time with detail to products, items, invoice, or P.O. numbers; etc.)

d. At least one record selection at run time

e. At least a few thousand records

What happens the day of the tutoring?

We'll use Go-to-Meeting to step through the lessons online. We'll explain how to unzip and save the NGS *SmartView* Template file, run your query from *Qport Access,* and output it to the saved NGS *SmartView* template. We'll work with you on the *SmartView* layout, customize field names if preferred, and go through some of the NGS-designed charts in the template file. We'll review chart attributes so you can build your own customized templates. Finally, we'll cover many of the capabilities of *SmartView,* including recent enhancements.