



V2Connect Manual

V2Connect Introduction

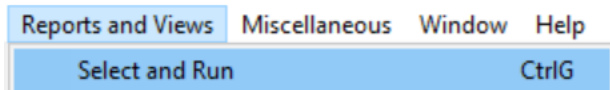
Welcome to V2Connect, a new outputting interface for PHDwin V2.11. V2Connect takes advantage of the ability to Excel to connect to the Access out file in V2.

Notes:

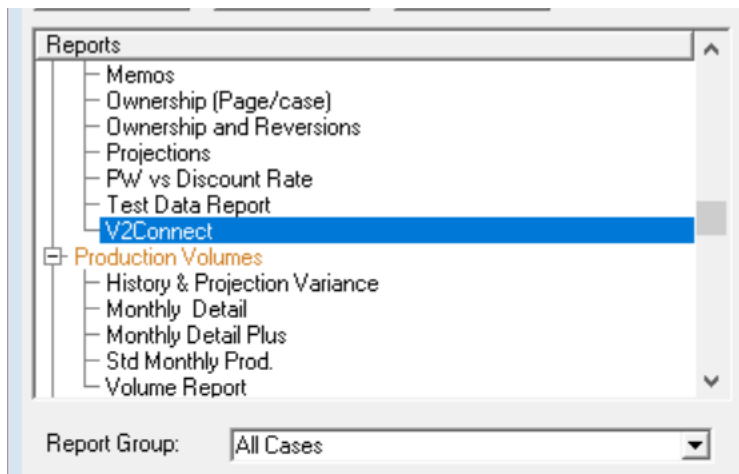
- **V2Connect only works with PHDwin 2.11 and greater.**
- **V2Connect can only reflect the last report run done via the V2Connect report in 2.11.**
- **By default V2Connect is designed to work with a single partner, more than one partner's worth of data can be loaded but the Bottom Line will be inaccurate.**
- **V2Connect does not show any summary data in the outputs, to have the same output as the main One Liner but with summaries you must run the "Excel One Liner" from the Reports window.**
- **V2Connect is only for the output of data and any changes made in the V2Connect spreadsheet must be re-imported back into 2.11 in order to see those changes be reflected in future report runs.**
- **V2Connect does not rely on monthly data and therefore should not hit the 2GB limit of Access, but the connection is data heavy and can take a powerful machine (aka V3 minimum system requirements) to be able to use this feature.**

To use V2Connect:

1. Select the correct partnership you wish to use.
2. Go to “Reports and Views” then “Select and run:”



3. Pick the “V2Connect” report and run it for “All of Partner: All Cases”:



4. Run the report, when you see this output the spreadsheet is ready:

V2Connect is ready please refresh the spreadsheet

Welcome to V2Connect!

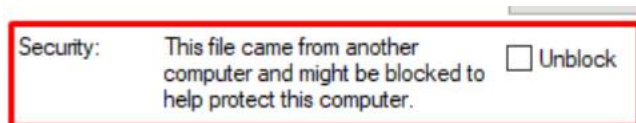


5. Go to the “V2Connect” spreadsheet and hit the green refresh button, once the refresh is done you will see the results from that previous run in the spreadsheet.
6. If you wish to see different parameters, make the changes in PHDwin V2, rerun the “V2Connect” report and then refresh the spreadsheet when the report is finished running.

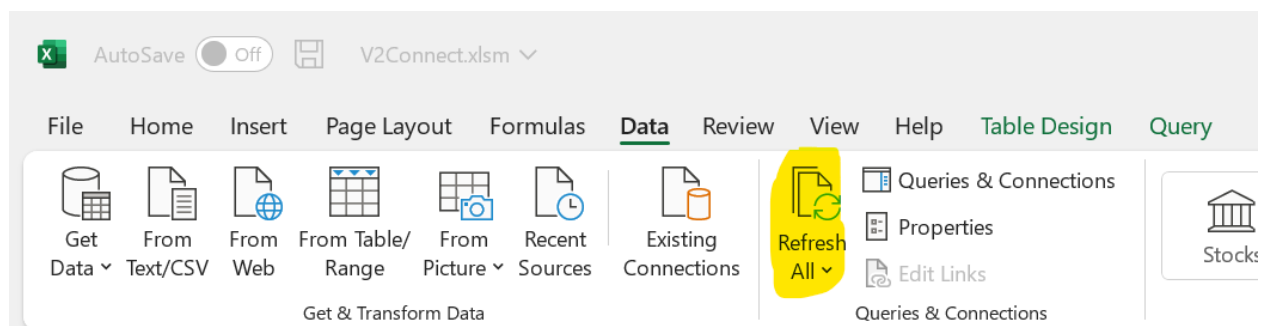
Troubleshooting:

Issue: Macros not working or not enabled

- V2Connect uses a macro to enable the refreshing. To enable macros in the spreadsheet right click on the V2Connect spreadsheet in your file explorer and select “Properties.” Then select the “unblock” option on the general tab:

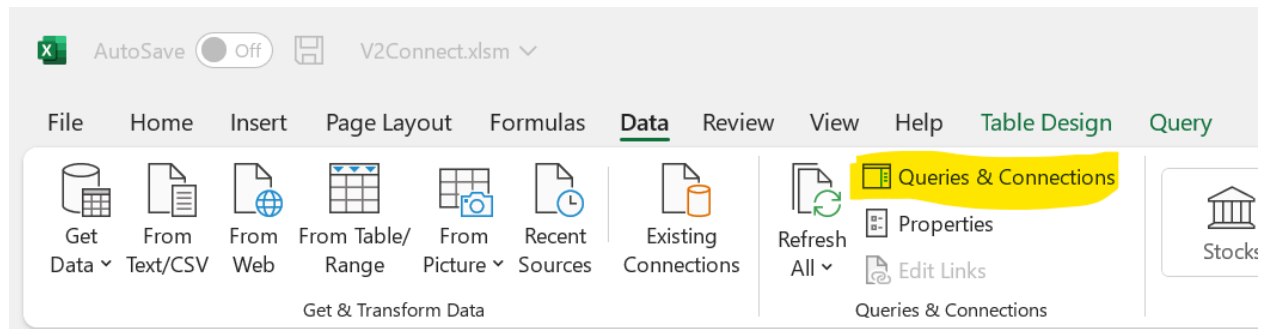


- If your organization will not allow macros to run for any reason, the “Refresh All” button in Excel under the “Data” ribbon can serve the same purpose as the green button on the first sheet that uses the macro:

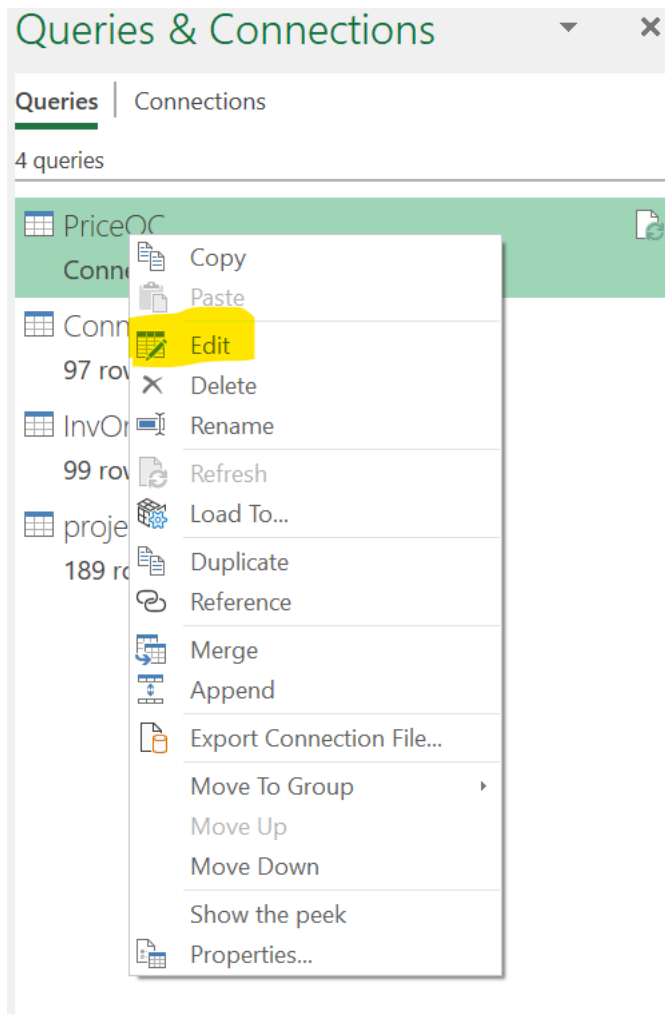


Issue: PHDwinOut file location changed

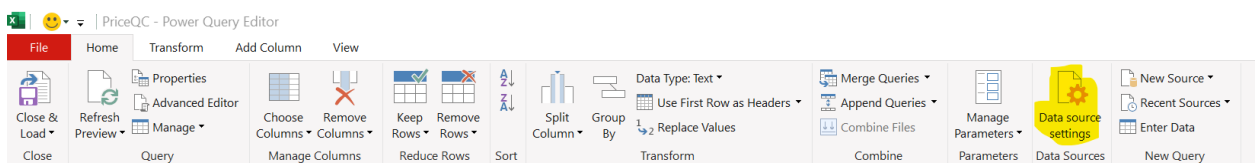
- If you have changed the default location to your outfile in V2, select “Queries and Connections” on the “Data” ribbon in Excel:



- Then when the Queries pop up on the right right click on the first one and select the “Edit” option:



- The “Power Query Editor” will then open, select the “Data source settings” on its home ribbon:



- In the new window that pops up select “change source” and point it to the new local for your Outfile. This then can be saved to the spreadsheet for future use.