- 1. Open the EXCEL workbook you have connected to the MARS database.
- 2. Click the "Enable Content" button if you are seeing the Security Warning message within EXCEL.

File	Home	Insert	Page Layout	Formulas	Data	Review	View	Developer	Add-ir
Paste	orgentation Cut Copy → Copy →	Cal inter B	ibri y	• 9 • A A •		_ % ∙ ≡ € ₹	F Wr 🗄 Me	ap Text erge & Center	Gen
	Clipboard	5	Font	F2		Align	nment		Es.
1	SECURITY WAR	NING Exte	rnal Data Conne	ctions have been d	lisabled	Enable C	ontent]	
G13	*	×	√ f _x						
	А		В	С		D		E	
1	IARS: Reven	ue Cycle							

3. Select "Yes" if you are seeing the following message.

Security Warning								
Do you want to make this file a Trusted Document?								
This file is on a network location. Other use network location may be able to tamper wit	This file is on a network location. Other users who have access to this network location may be able to tamper with this file.							
What's the risk?								
Do not <u>a</u> sk me again for network files	Yes <u>N</u> o							

- 4. Then the EXCEL will try to refresh the data from the MARS cube. Just wait until it is completed.
- 5. Following step $1 \rightarrow 2 \rightarrow 3$ below so that the **Workbook Connections** windows has popped up.

	MARS - Daily Charge and net collection 091218.xlsx - Excel												
ut	Formulas Data R	eview View	Developer	Add-ins	Power Pivot	Team	Analyze	Design	∑ Te	ll me what you	want to do		
ng tions	Show Queries New Query - C Recent Source Get & Transform	1. Refresh All + Conr	Connections Properties Edit Links rections 2.	Sort S	Filter	Te ed Col	kt to Flash umns Fill	Remove Duplicates	Data Validation Data	Consolidate •	Relationships	Manage Data Model	WI Ana
349	679.45 B		С			D		E		F		G	

Analytic Repo	rtiı	ng System		Workbook Connections					
Turrent System	T		_	Name	~	Description		Last Refreshed	A <u>d</u> d ▼
RE MEDICAL GROUP INC (3)	-,T			Transaction	-Level Perspective	Transaction-	Level Perspective	10/17/2018 11	Remove
	-								Properties
9	-								<u>r</u> iopentes
DLIDATED	Τ _Ψ								<u>R</u> efresh •
Fiscal Month	T								Manage Sets
Jul 2018		Aug 2018		•				•	
881	.15	578	3,57	Locations wh	ere connections are	used in this wo	orkbook		
756,391	1.27	822	2,17						
1,115,433	3.22	648	3,03	Click here to	see where the sele	cted connectio	ns are used		
54,802	2.66	2	7,86						
940,218	8.90		22						
677,325	5.36	94	5,62						
27,683	8.64	975	5,40						
316	5.00	91:	1,62						
1,006,394	.62	81:	L,70						
1,486,581	1.10	57:	L,73						Close
827,597	7.97	5:	1,14						
529,564	1.86		1,311	80		720,078.28	1,250,954.94		
044 707	2.00	001		001		000 170 04	0.007.540.00		



6. Click on Properties button once you see the Workbook Connections screen.

Name	Description	Last Refreshed	A <u>d</u> d
RevCycle Cube		11/20/2019 2:44:54 PM	Re <u>m</u> ove
			<u>Properties</u>
		_	Refresh
			Manage Sets.
ocations where o	connections are us	ed in this workbook	
ocations where o	connections are us	ed in this workbook ed connections are used	
ocations where o	connections are us	ed in this workbook ed connections are used	

7. Then you will click on the definition tab within the Connection Properties screen.

	Connection Properties ? >	<
	Connection name: RevCycle Cube Description:	
	Usage Definition	
	Refresh control Last Refreshed: 11/20/2019 2:44:54 PM	-
	☐ <u>R</u> efresh every 60	
	Refresh data when opening the file Remove data from the external data range before saving the workbook Refresh this connection on Pefresh All	
	OLAP Server Formatting	
	Retrieve the following formats from the server when using this connection: Number Format Fill Color Font Style I text Color	
0	OLAP Drill Through	-
	Maximum number of records to retrieve: 1000	
-	Language	-
	Retrieve data and errors in the Office display language when available	
	OK Cancel	

MARS - HOW TO UPDATE EXCEL DATA CONNECTION 01/24/2020

- 8. Please do the following once you are on the Connection Properties screen
 - Make sure the "Always use connection file" option is unchecked.
 - Double-check you current connection it's CALV-BI-SM\MDIM
 - Change the last part of the connection string from Level=2 to Level=1. You only need to change it from 2 to 1. → Then press OK at the bottom of the screen.

	Connection Proper	ties	?	×
	Connection <u>n</u> ame: Descr <u>i</u> ption:	RevenueCycle Cube RevCycle at transaction level		
		······		
D	Usage <u>D</u> efinition	on		
5	Connection type:	Office Data Connection		_
o	Connection file:	http://bi-sp13/sites/mars/reports/dat	Brows	e
		Always use connection file		
	Connection <u>s</u> tring:	Security=SSPI;Persist Security Info=Tru Catalog=RevTransaction_DEV;Data Source=CALV-BI-SM\MDIMMDX Comp 1;Safety Options=2;MDX Missing Mem Mode=Error;Update Isolation Level=2	e;Initial atibility= ber	<
D		Save pass <u>w</u> ord	K	
	Command type:	Cube		\sim
0	Co <u>m</u> mand text:	Transaction-Level		
5	Excel Services:	Authentication Settings		
1	Eart Query	Export Connection File		
5		ОК	Car	ncel

9. After clicking on OK, you will see a pop-up screen as shown here. Please go ahead and click on Yes.

Microsoft	t Excel X
	The connection in this workbook will no longer be identical to the connection defined in the external file located at 'http://bi-sp13/sites/mars/reports/data Connections/excel_starterreports/RevenueCycle_Transaction-Level.odc'. The link to that external file will also be removed. Do you want to proceed with changes to the connection in this workbook?
	Yes No

MARS - HOW TO UPDATE EXCEL DATA CONNECTION 01/24/2020

10. Let us follow by doing a refresh on the pivot table to make sure new data connection work!

llec	tion 091218.xlsx -	Excel			PivotTak	ole Tools		
w	Developer	Add-ins	Power Pivot	Team A	nalyze	Design	Q Tel	l me what y
n					J.]		fx
	Insert Insert	Filter	Refresh Chan	ge Data 🛛 Clea	Selec	t Move	Fields,	Items, OL
	Slicer Timeline	Connection	s 🛛 👻 📐 Sou	ırce * *	*	PivotTable	8t Se	ets≖ Too
	Filte	r	Lata		Acti	ons		Calcul
	D		E	F		G		

Press the refresh button and then play with some filter on the pivot table to ensure data can be updated without error.

- 11. Hurray! You have completed the data connection update for the MARS Excel workbook. You may save the EXCEL workbook as usual. The next time you open up the same workbook, it will refresh data from the new data connection you just set up.
- 12. Shall you run into any issue following this instruction, please email <u>bi-admin@med.usc.edu</u> or contact any of the BI team members below. We are here to help!