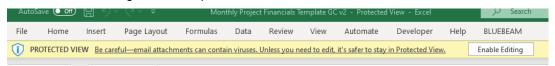


# Standard Operating Procedure (SOP/SSOG) GC Forecast Tool – Initial Setup

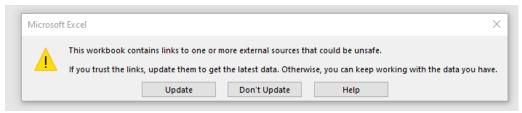
October 2023

# 1. Step 1: Open File and Enable Editing

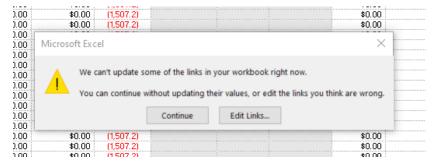
Select Enable Editing from the top bar



#### 2. Update Links

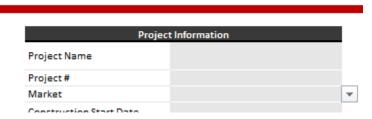


## 3. Continue with Updates



# 4. Enter Project Number of Profit Plan Tab





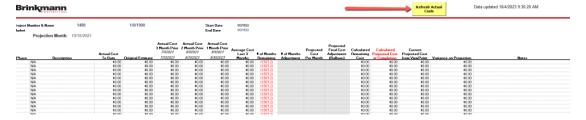


GC Forecast Tool Setup October 5, 2023 Page 2

# 5. Enter Start & End Dates on Original Forecast Tab



#### 6. Refresh Actual Costs on GC Forecast Tab

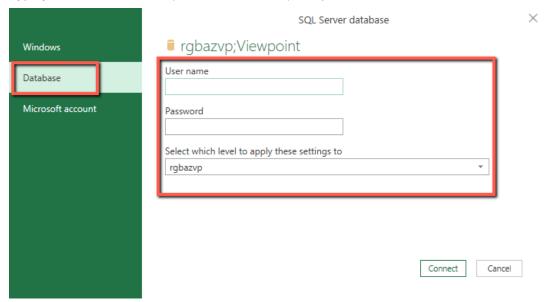


## 7. Connect to Viewpoint

If you have not connected to Visa (Viewpoint) previously you will be prompted to log-in with you credentials as shown in the screen below.

Switch to the "Database" tab.

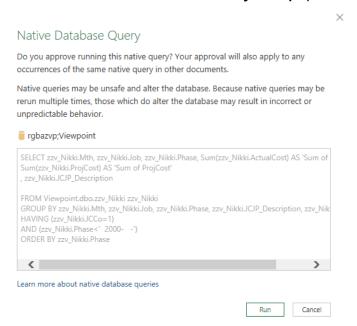
Type your Vista Username (firstname.lastname) and password



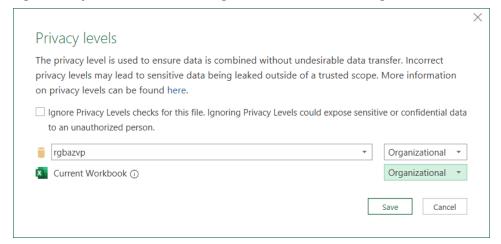


GC Forecast Tool Setup October 5, 2023 Page 3

#### 8. Select "Run" for the Native Database Query Prompt (2-3 times)



## 9. Change Privacy Level Checks to "Organizational" and click "Ignore"





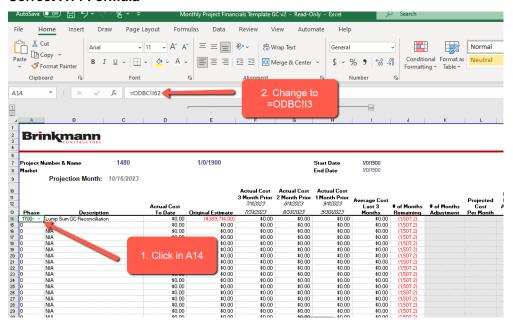
GC Forecast Tool Setup October 5, 2023 Page 4

## 10. Data Loading

The bottom left corner should show this loading section while the data refreshes.

62	dv	Running background guery (Click here to cancel) 👨 🖔 Accessibility: Investigate					
	4	+	Instructions	Profit Plan	Buyout Status	Graph	Revenue Projecti
3	0	N/A			\$0.00	\$0.00	\$0.00
2	0	N/A			\$0.00	\$0.00	\$0.00
1	0	N/A			\$0.00	\$0.00	\$0.00
0	0	N/A			\$0.00	\$0.00	\$0.00
9	0	N/A			\$0.00	\$0.00	\$0.00
8	0	N/A			\$0.00	\$0.00	\$0.00
7	0	N/A			\$0.00	\$0.00	\$0.00
6	0	N/A			\$0.00	\$0.00	\$0.00
5	10	N/A			\$0.00	\$0.00	\$0.00

#### 11. Correct A14 Formula



## 12. Populate Remaining Data

Copy and paste cell A14 throughout the remaining rows or double click the bottom right corner of cell A14 (Fill Handle)