## Instructions: Exporting Query-Ready CalPlanning Reports into Smart View

To export Query-Ready CalPlanning reports into **MS Excel Smart View** for further ad hoc querying, follow the steps below:

1. From a CalPlan, CalRptg or HCPRptg report click on the **Export in Query-Ready Mode** link in the bottom right corner of the report.



2. Excel Smart View opens with **Private Connections.** From the **Home** drop down arrow select **Shared Connections.** 



3. Select **Oracle Essbase** from the **Shared Connections** drop down and then select the desired CalPlanning module (CalRptg shown here) and click **Connect**.

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4. Click on Ad hoc analysis.



5. Select Reuse sheet contents and POV to maintain the report POV and data.



## Result

You have a query-ready CalPlanning financial report available in MS Excel Smart View available for additional ad hoc querying, editing &/or formatting.

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File	Home	Insert I	Page Layout Formu	fas Data J	teview View Se	art View	Essbase		ය 🕜 ය 🖨 වි	
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2		A		B	C	D	-	Smart View	- ×	
2				2015-16	-16		Shared Connections	(Å - 30		
3				Current Funds	Unrestricted Funds	Designated	gnated Restricted	Courte & Enderson	<b>a b b</b>	
4	Net Tu	ition and f	lees	602003.19	602003.19	0		Chape & carpage		
5	Private	e Gifts for d	Current Use	444618.41	0	0		S EssbaseOuster-1		
6	Investment Income Sales and Services			-100.23	-100.23	¢		R- CaRoto		
7				126668.15	126668.15	0		CaRoto		
8	Total Revenue			1173189.52	728571.11	0		E HORpig		
9	Operating Transfers			4214299.76	4149209.47	0		B-W Jan 1940P B-W PriorHCP		
10	Total Revenue & Transfers			5387489.28	4877780.58	0				
11	Academic Salaries & Wages			292215.79	202583.19	0				
12	Staff Salaries & Wages			416895.48	349270.12	0				
13	Employee Benefits			198318.09	158147.25	0				
14	Total Compensation			907429.36	710000.55	¢				
15	Supplies, Materials and Equipment			94980.3	74413.76	0				
16	Scholarships and Fellowships			46651.68	5825.6	0				
17	Other Operating Expenses			107410.72	38423.74	0				
18	Total Non Compensation			249042.7	118663.1	C				
19	Total Expenses			1156472.06	828663.65	0				
20 1	Net Operating Surplus/(Deficit)			4231017.22	4049116.92	0				
21	From/(To) Plant Funds		-15000	-15000	c					
22	From/(To) Regents Endow Pool			57654.42	0	0				
23	Changes in Fu	nd Balance	e - Pos/(Neg)	42654.42	-15000	0				
24 Change in Net Assets - Pos/(Neg)				4273671.64	4034116.92	0		Re Add to Private connections		
25 Beginning Balance				2627768.51	1620185.11	380.53		Ad hoc analysis		
26 Ending Balance			6901440.15	5654302.03	380.53		Query Designer			
27								St New Smart Query Sheet		
20	N Queti	Quet? Q	Sheetd Pl	1	4		+17	More>>		

