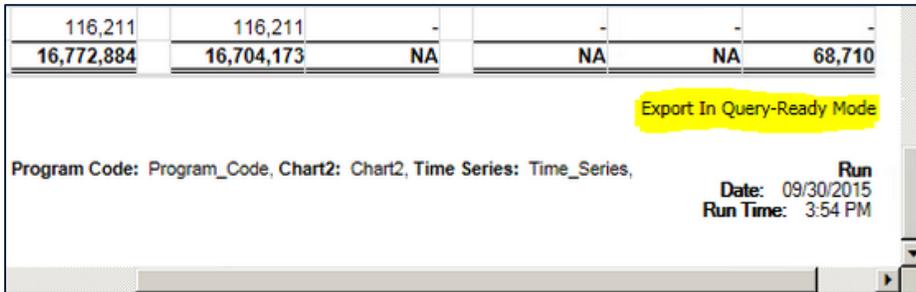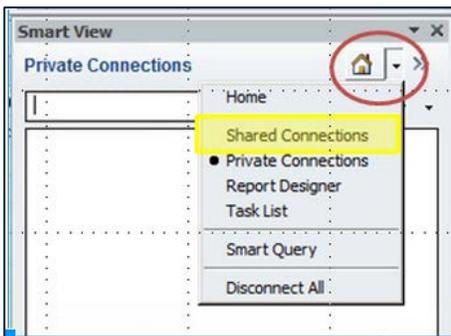## Instructions: Exporting Query-Ready CalPlanning Reports into Smart View

To export Query-Ready CalPlanning reports into **MS Excel Smart View** for further ad hoc querying, follow the steps below:
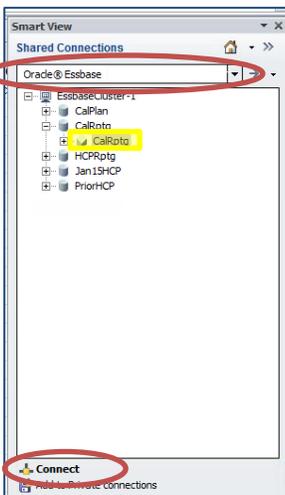
1. From a CalPlan, CalRptg or HCPRptg report click on the **Export in Query-Ready Mode** link in the bottom right corner of the report.
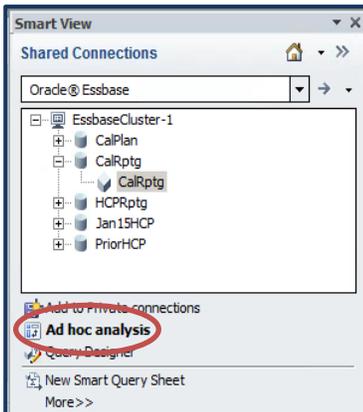

2. Excel Smart View opens with **Private Connections.** From the **Home** drop down arrow select **Shared Connections.**
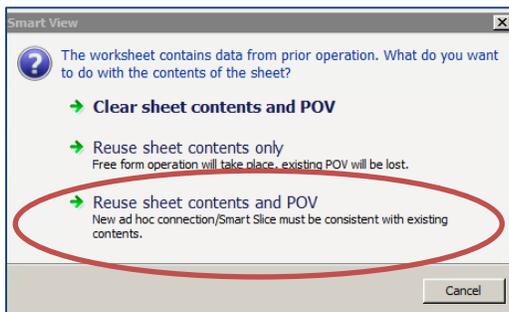

3. Select **Oracle Essbase** from the **Shared Connections** drop down and then select the desired CalPlanning module (CalRptg shown here) and click **Connect**.

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.