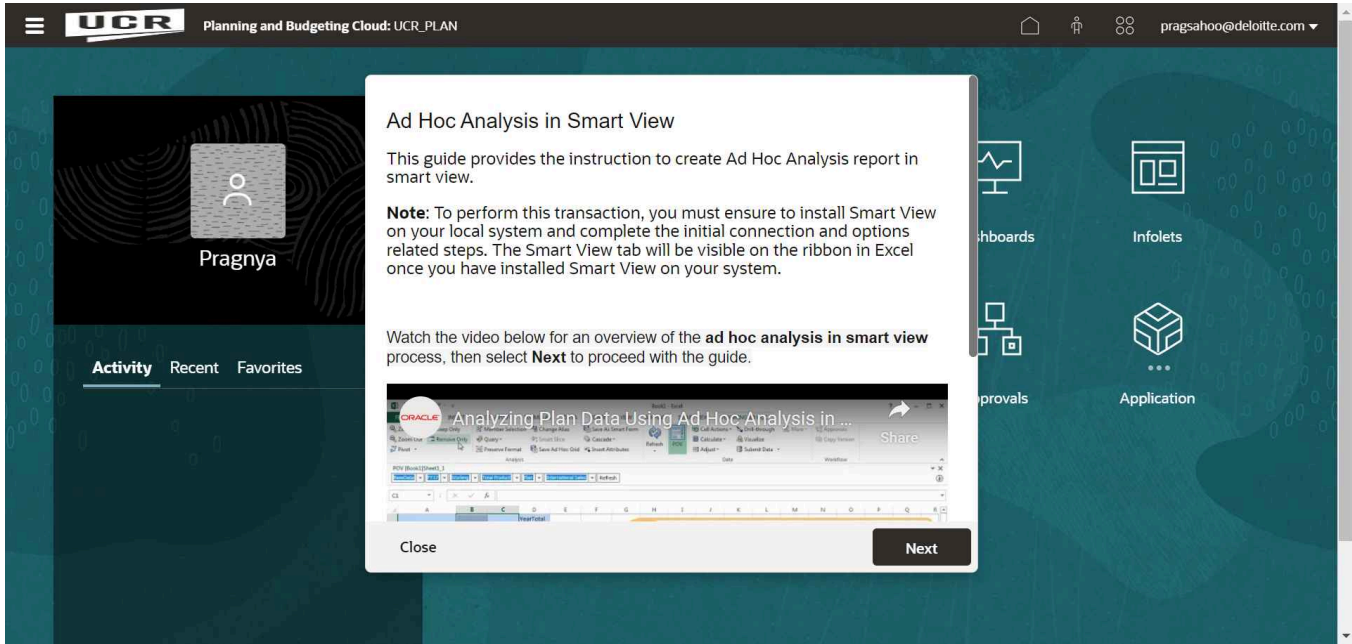


Ad Hoc Analysis in Smart View

Step 1

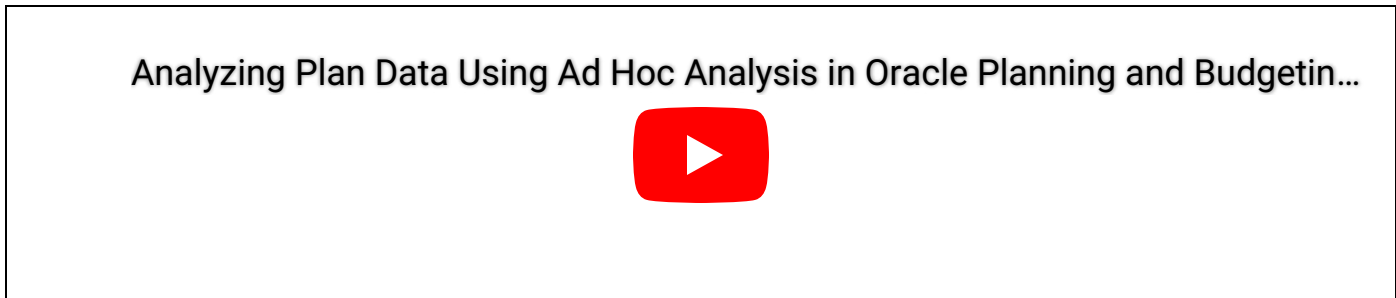


Ad Hoc Analysis in Smart View

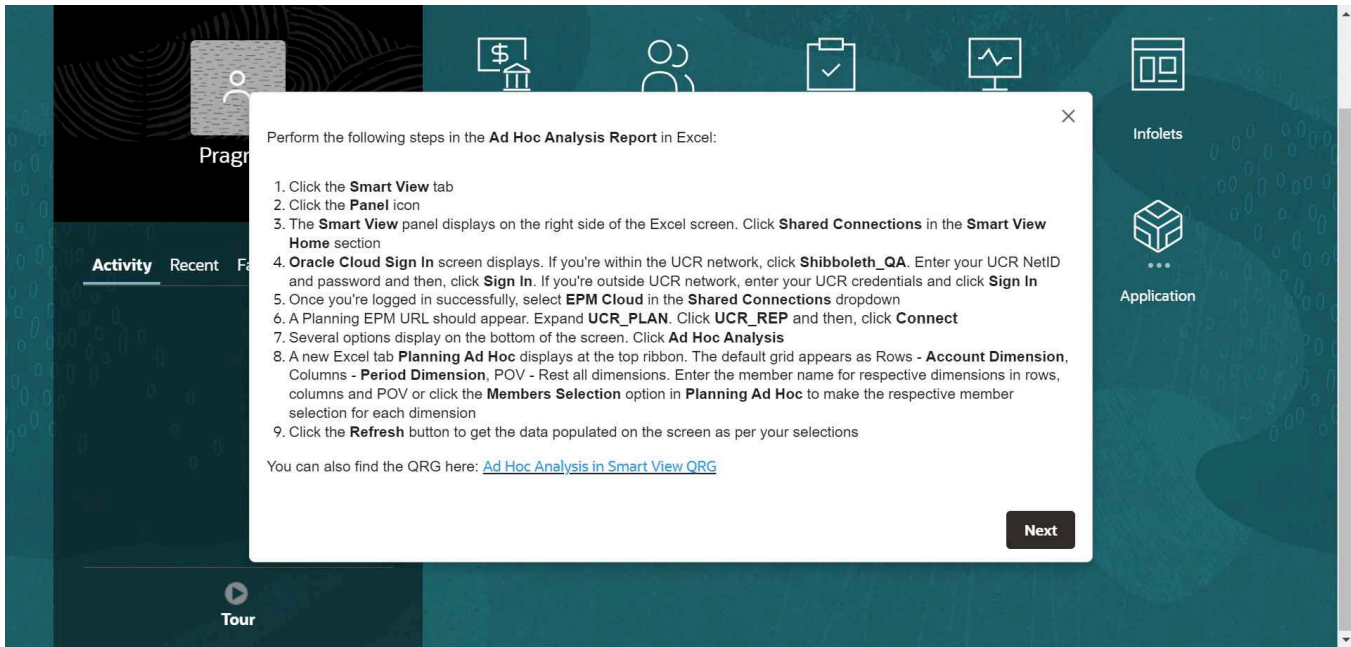
This guide provides the instruction to create Ad Hoc Analysis report in smart view.

Note: To perform this transaction, you must ensure to install Smart View on your local system and complete the initial connection and options related steps. The Smart View tab will be visible on the ribbon in Excel once you have installed Smart View on your system.

Watch the video below for an overview of the **ad hoc analysis in smart view** process, then select **Next** to proceed with the guide.



Step 2

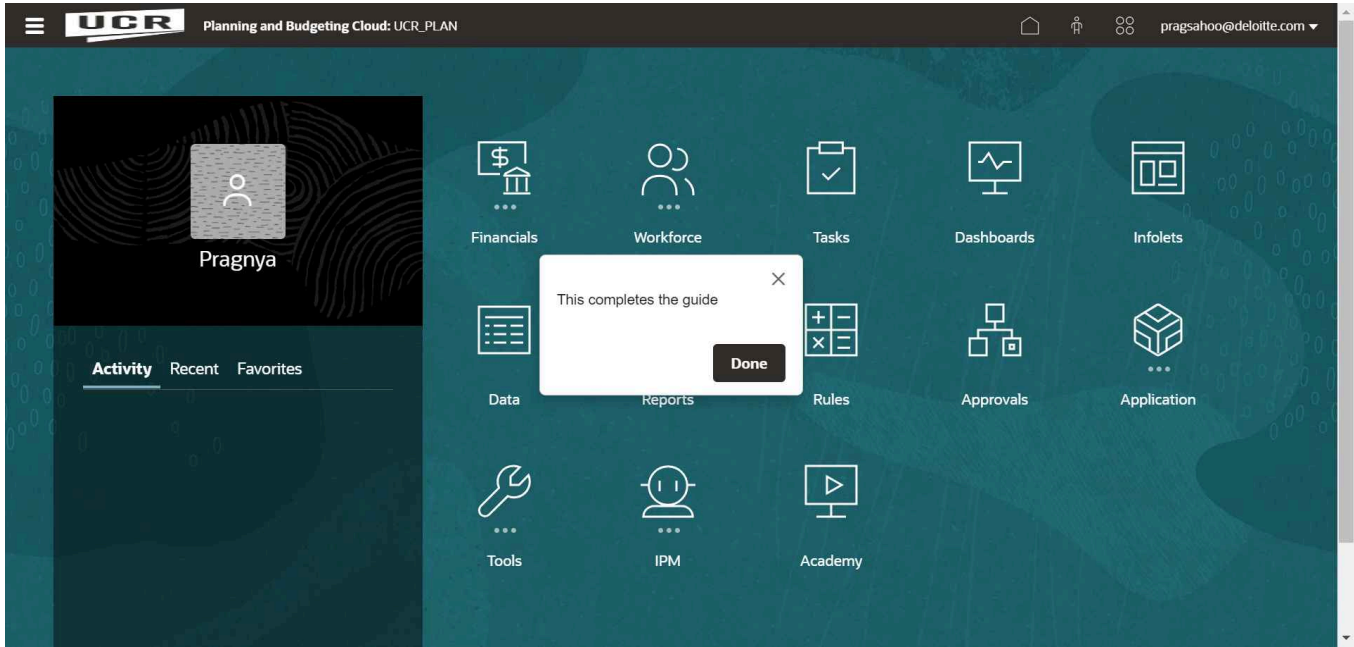


Perform the following steps in the **Ad Hoc Analysis Report** in Excel:

1. Click the **Smart View** tab
2. Click the **Panel** icon
3. The **Smart View** panel displays on the right side of the Excel screen. Click **Shared Connections** in the **Smart View Home** section
4. **Oracle Cloud Sign In** screen displays. If you're within the UCR network, click **Shibboleth_QA**. Enter your UCR NetID and password and then, click **Sign In**. If you're outside UCR network, enter your UCR credentials and click **Sign In**
5. Once you're logged in successfully, select **EPM Cloud** in the **Shared Connections** dropdown
6. A Planning EPM URL should appear. Expand **UCR_PLAN**. Click **UCR_REP** and then, click **Connect**
7. Several options display on the bottom of the screen. Click **Ad Hoc Analysis**
8. A new Excel tab **Planning Ad Hoc** displays at the top ribbon. The default grid appears as Rows - **Account Dimension**, Columns - **Period Dimension**, POV - Rest all dimensions. Enter the member name for respective dimensions in rows, columns and POV or click the **Members Selection** option in **Planning Ad Hoc** to make the respective member selection for each dimension
9. Click the **Refresh** button to get the data populated on the screen as per your selections

You can also find the QRG here: [Ad Hoc Analysis in Smart View QRG](#)

Step 3



This completes the guide