

Overview

Introduction

The Intersection Form is a CalPlanning data form that finds the lowest level intersection of chart of accounts values where your data is populated. The intersection is the level at which you can change CalPlan data. You can use the Intersection Form to modify existing data. A new feature as of the February 2, 2015 release is the ability to add a new intersection row of data into the Intersection Form.

There are now two intersection forms with the same functionality, but the chart of accounts are ordered differently to provide two different views of your data. The original Intersection Form was sorted by Entity first, and the newly added Intersection Form is sorted by Account first. The two forms display the same information in a different sort order to allow for easier and more thorough data analysis. Which form is being utilized is based solely on user preference, as the intersection forms are designed to help users with their planning. Users are not required to use the forms if they do not wish to do so.

Planners are now able both modify data and add rows of data directly in the following Intersection Form tabs:

1. Revenue
2. Transfers
3. Non-Comp Expense
4. Changes in Fund Balance

This document explains two ways that you can enter data into Intersection Forms: A) using CalPlan and B) using Smart View.

Note: As a reminder, Compensation expenses continue to be read-only in these CalPlan forms since compensation data is planned in HCP.

Content Overview

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- Add an intersection row directly into the Intersection Forms
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- Add an intersection row directly into the Intersection Forms using Smart View

Security Access

CalPlanning users with a Planner role will have access to change CalPlan data.

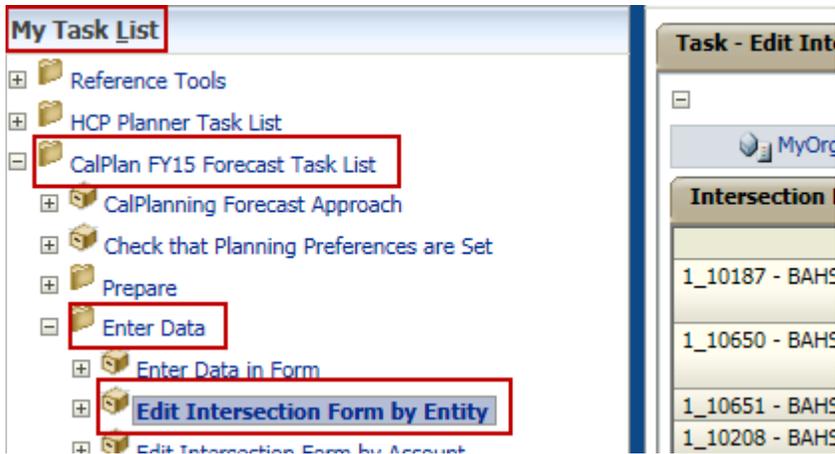
Questions

If you have any questions, please email calplanhelp@berkeley.edu.

Navigating to the Intersection Forms

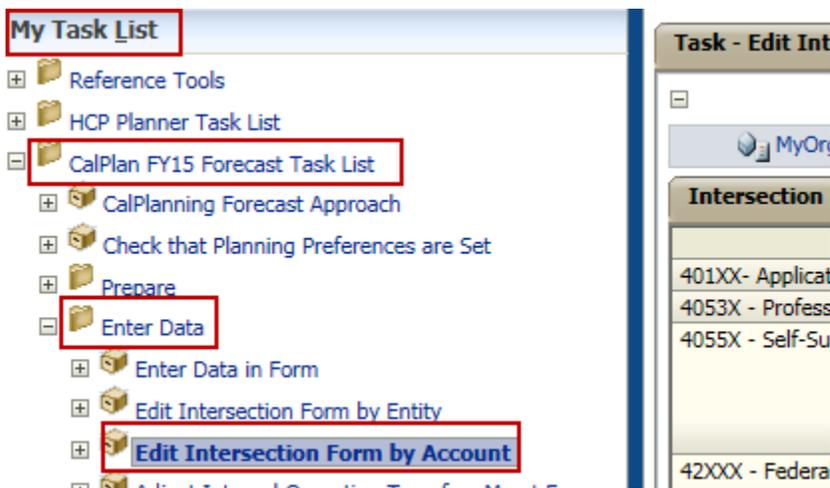
Intersection Form by Entity

1. Log into CalPlanning and navigate to your CalPlan Task Lists
2. Navigate to the Intersection Form by Entity using the following Menu Path: **CalPlan FY15 Forecast Task List > Enter Data > Edit Intersection Form by Entity**



Intersection Form by Account

1. Log into CalPlanning and navigate to your CalPlan Task Lists
2. Navigate to the Intersection Form by Account using the following Menu Path: **CalPlan FY15 Forecast Task List > Enter Data > Edit Intersection Form by Account**



Enter Data into the Intersection Form Using CalPlan

Follow the steps below to enter data into the Intersection Forms using CalPlan.

1. Login to CalPlan and navigate to the Run Intersection Form task list using the menu path referenced above.
 CalPlan FY15 Forecast Task List > Enter Data > Edit Intersection Form by Entity or
 CalPlan FY15 Forecast Task List > Enter Data > Edit Intersection Form by Account

Note: Just like any of the other CalPlan forms, planners can only enter data into **white** cells:

Intersection Form - Revenue				Intersection Form - Transfers		Intersection Form - Comp Expense		Intersection Form - Non-Comp Expense		Intersection Form - Changes in Fund Ba	
										YearTotal	
1_10187 - BAHSB Devel Alumni Relations	Sales and Services Other Revenue - Plan	C1 - Summary - Plan	46000 - Sales Services & Other Income - Plan							0	
1_10373 - BAHSB B&O Haas Gear	66350 - Generic Revenue-Other Sources	C1 - Summary - Plan	48000 - Other Income - Plan							(22)	
	Sales and Services Other Revenue - Plan	C1 - Summary - Plan	46000 - Sales Services & Other Income - Plan							21,855	
1_10375 - BAHSB B&O Cafe	Sales and Services Educational - Plan	C1 - Summary - Plan	46000 - Sales Services & Other Income - Plan							42,393	
1_10464 - BAHSB Exec Ed Custom	60351 - Center for Exec Education	C1 - Summary - Plan	49500 - Nonoperating Rev/Exp-Other - Plan							1,200,000	
1_10652 - BAHSB Student Aid PhD	Restricted Gifts - Plan	C1 - Summary - Plan	44000 - Private Gifts for Current Use - Plan							133,792	
1_10653 - BAHSB Student Aid Undergrad	Restricted Gifts - Plan	C1 - Summary - Plan	44000 - Private Gifts for Current Use - Plan							48,740	
	Restricted Foundation Endowments - Plan	C1 - Summary - Plan	44000 - Private Gifts for Current Use - Plan							115,016	
1_10654 - BAHSB Student Aid General	Restricted Gifts - Plan	C1 - Summary - Plan	44000 - Private Gifts for Current Use - Plan							50,000	
	Restricted Foundation Endowments - Plan	C1 - Summary - Plan	44000 - Private Gifts for Current Use - Plan							3,976	
	Restricted Foundation FFE - Plan	C1 - Summary - Plan	44000 - Private Gifts for Current Use - Plan							483	
1_10208 - BAHSB Berk Innov Ldr Dev-BILD	Restricted Gifts - Plan	C1 - Summary - Plan	44000 - Private Gifts for Current Use - Plan							45,000	
1_10314 - BAHSB Instr MFE Gen Ops	60344 - HAAS: CTR FOR EXEC DEVELOPMENT	C1 - Summary - Plan	40400 - SS and Special Programs Rev - Plan							139,500	
	Restricted Gifts - Plan	C1 - Summary - Plan	44000 - Private Gifts for Current Use - Plan							9,750	
	Restricted Foundation Endowments - Plan	C1 - Summary - Plan	44000 - Private Gifts for Current Use - Plan							13,000	

Note: the Comp Expense Intersection Form is grayed out, because the form is read-only

Intersection Form - Revenue		Intersection Form - Transfers		Intersection Form - Comp Expense		Intersection Form - Non-Comp Expense		Intersection Form - Changes in Fund Ba			
										YearTotal	
1_10534 - BAHSB Acad Faculty Gen Ops	20150 - EVENING MBA-HAAS FEE	C1 - Summary - Plan	50210 - Faculty							2,680,570	
			53010 - Faculty Benefits							699,629	
			57310 - General & Empl Liability Insur							22,785	
	20151 - MFE Degree Fee	C1 - Summary - Plan	50240 - Acad Teach-Regular (Default)								401,077
			53030 - Other Academics Benefits								67,782
			57310 - General & Empl Liability Insur								3,409
	20231 - PD Supp Tuition - Bus Adm/Mgmt	C1 - Summary - Plan	50210 - Faculty								555,000
			53010 - Faculty Benefits								144,855
			57310 - General & Empl Liability Insur								4,718
	19900 - GENERAL FUNDS	C1 - Summary - Plan	50210 - Faculty								13,548,257
			53010 - Faculty Benefits								3,536,095
			57310 - General & Empl Liability Insur								115,160
1_10372 - BAHSB B&O Fac Assists	19900 - GENERAL FUNDS	C1 - Summary - Plan	51210 - Staff-Non student							572,279	
			52000 - Other Employee Compensation - Plan								0
			53020 - Staff Non student Benefits								229,484
			57310 - General & Empl Liability Insur								4,864

2. Select the data to update.
 - a. **Example:** Update 1_10654 > Restricted Regents FFE - Plan from 2,664 to 5,000 in the Transfers form.

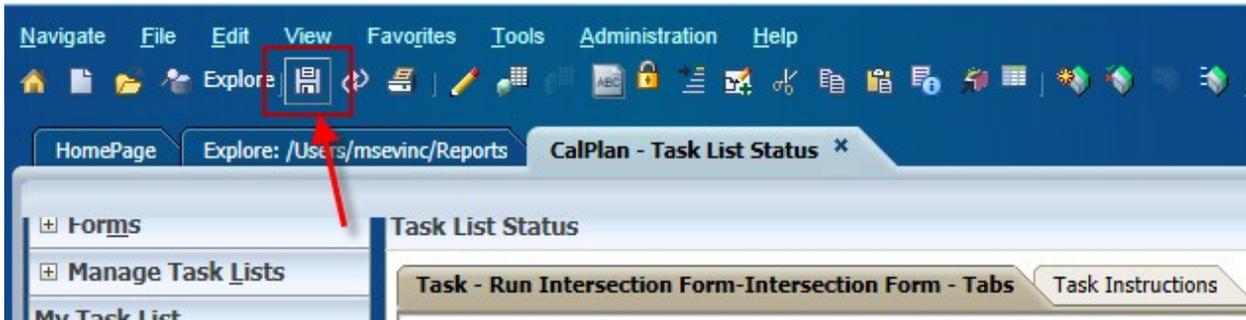
Before

Intersection Form - Revenue		Intersection Form - Transfers		Intersection Form - Comp Expense		Intersection Form - Non-Comp Expense		Intersection Form - Changes in Fund Ba		
										YearTotal
1_10654 - BAHSB Student Aid General	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout							4,073
	Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout							2,664

After

Intersection Form - Revenue				Intersection Form - Transfers		Intersection Form - Comp Expense		Intersection Form - Non-Comp Expense		Intersection For	
										YearTotal	
1_10654 - BAHSB Student Aid General		Restricted Regents Endowments - Plan		C1 - Summary - Plan		72210 - Regents Endow/FFE Payout				4,073	
		Restricted Regents FFE - Plan		C1 - Summary - Plan		72210 - Regents Endow/FFE Payout				5,000	

3. Click **Save**.

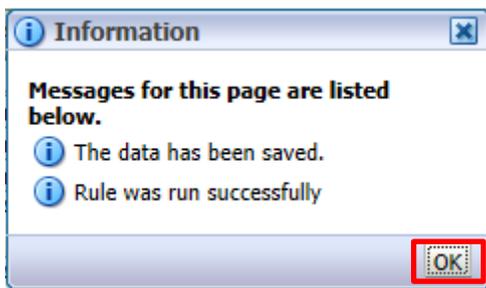


Two things happen when you click on the **Save** button:

1. Data is saved to the CalPlan database.
2. The AggEntity business rule is run for the MyOrg variable



Users will get a pop up message after clicking on the **Save** button:



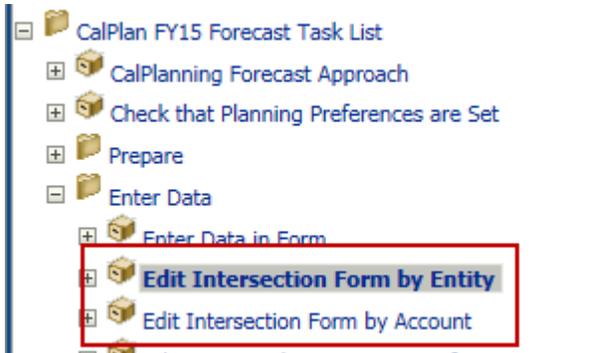
4. Click **OK** button.

This is the final step for completing this activity using CalPlan.

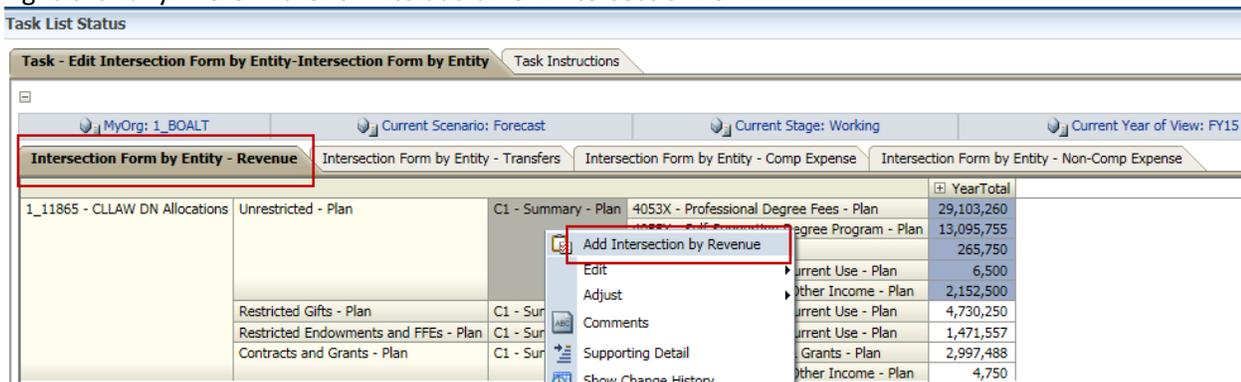
Add an Intersection Row into the Intersection Forms Using CalPlan

Follow the steps below to add a row of data into the Intersection Form in CalPlan.

1. Navigate to either of the two intersection forms:
 - a. Edit Intersection Form by Entity or
 - b. Edit Intersection Form by Account

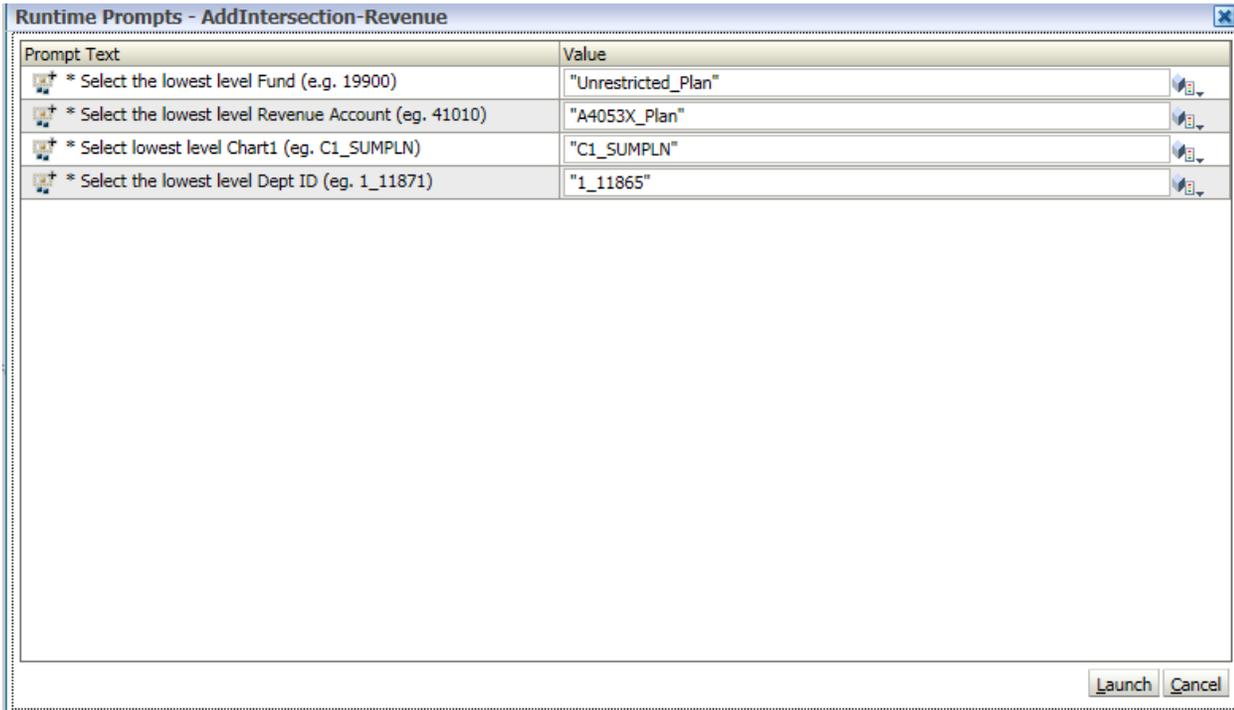


2. Right-click anywhere in the form to add a new intersection row



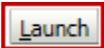
Note: Each tab of the intersection form is broken out by Account type. The business rule for each tab is specific to the tab's associated Account type.

- The Runtime Prompt will be pre-populated with the members from the form, which need to be updated as necessary. Be sure to select the lowest level members in each field. Otherwise, the business rule will not create a new intersection.

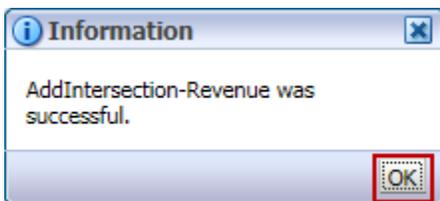


If the fields are not updated, and the “Add Intersection Business Rule” is launched, then a new intersection row will not be added. This is because the combination of Fund, Account, Chart1, and DeptID members already exist with dollar amounts in the form. A unique combination of members is required in order to add a new intersection row.

- Once a unique combination of lowest level members is selected, click Launch.



- Once the business rule is launched, a confirmation message will appear. Click OK. The business rule confirmation is dependent on the Account on which the rule is run.



6. The Intersection form will now have a new row with \$0.

Task - Edit Intersection Form by Entity-Intersection Form by Entity Task Instructions

MyOrg: 1_BOALT Current Scenario: Forecast Current Stage: Working

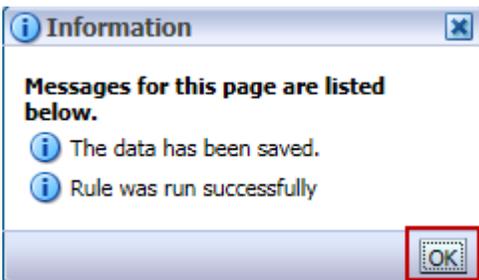
Intersection Form by Entity - Revenue Intersection Form by Entity - Transfers Intersection Form by Entity - Comp Expense Intersection Form by E

				YearTotal
1_11865 - CLLAW DN Allocations	Unrestricted - Plan	C1 - Summary - Plan	41010 - State General Support	0
			4053X - Professional Degree Fees - Plan	29,103,260
			4055X - Self-Supporting Degree Program - Plan	13,095,755
			4056X - Other Fees - Plan	265,750
	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	6,500
			46XXX - Sales Services & Other Income - Plan	2,152,500
			440XX - Private Gifts for Current Use - Plan	4,730,250
			440XX - Private Gifts for Current Use - Plan	1,471,557
			441XX - Private Contract & Grants - Plan	2,997,488
			46XXX - Sales Services & Other Income - Plan	4,750
Restricted Endowments and FFEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	1,471,557	
Contracts and Grants - Plan	C1 - Summary - Plan	441XX - Private Contract & Grants - Plan	2,997,488	
		46XXX - Sales Services & Other Income - Plan	4,750	

7. Change the \$0 to the correct dollar amount and click **Save**.



8. The AggEntity Business Rule will run and a confirmation message will appear. Click OK.

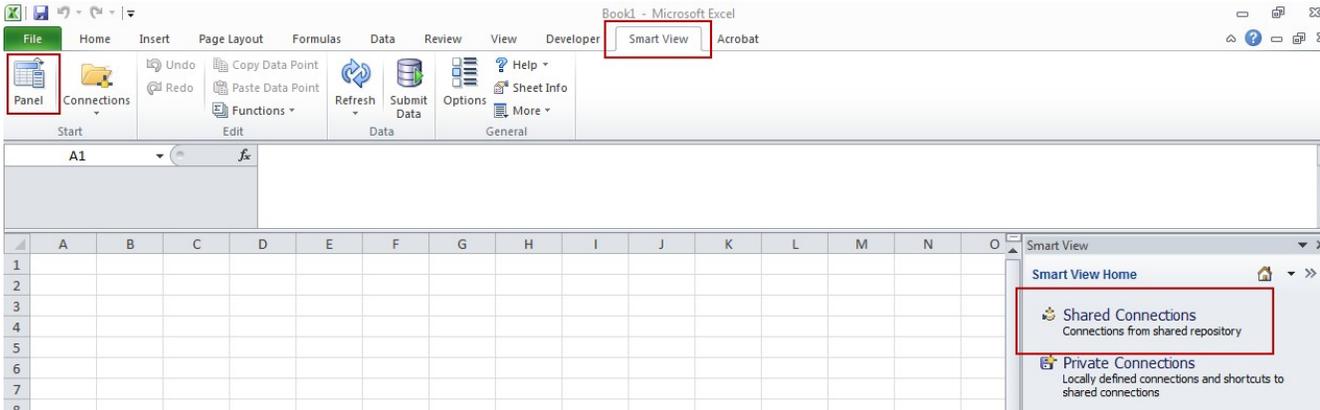


You have successfully added a row into an Intersection Form using CalPlan.

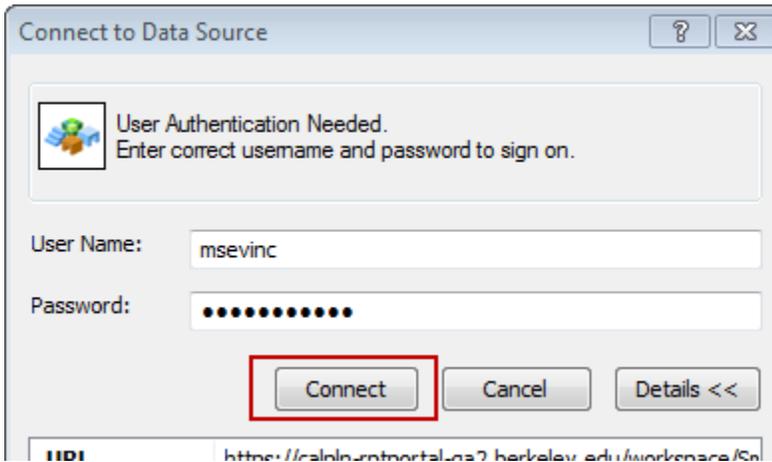
Enter Data into the Intersection Form Using Smart View

Follow the steps below to enter data into the Intersection Forms using Smart View.

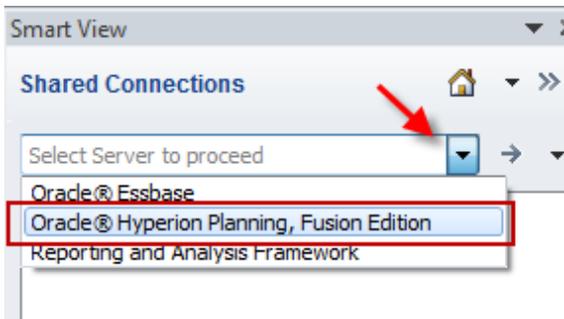
Menu Path: Use the following menu path in Excel: **Smart View > Panel > Shared Connections**



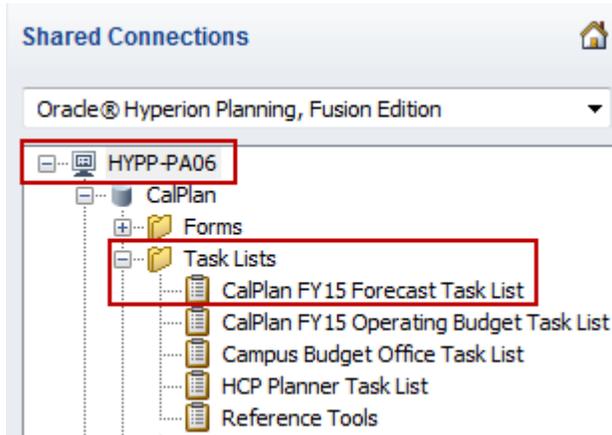
1. Enter User Name and Password. Click **Connect**.



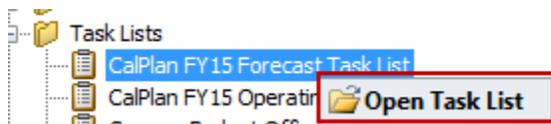
2. Click on the drop down menu arrow, to the right of the box that reads "Select Server to proceed". Select **Oracle Hyperion Planning, Fusion Edition** option in Shared Connections:



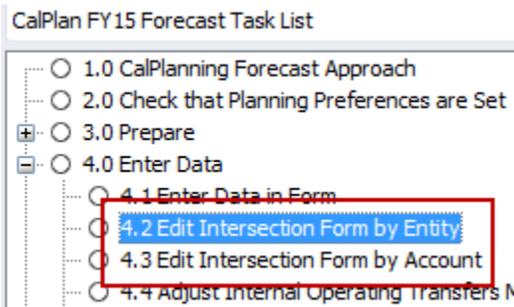
3. Expand **HYPP-PA06 > CalPlan > Task Lists**
4. Navigate to the **CalPlan FY15 Forecast Task List**



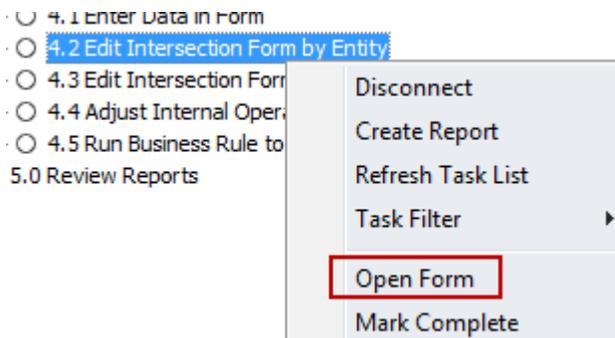
5. Right click on **CalPlan FY15 Forecast Task List** and click on **Open Task List**.



6. Once the Task List is open, navigate to the **Edit Intersection Form by Entity** or **Edit Intersection Form by Account** task list that is located under 4.0 Enter Data:



7. Right click on the Task List and click on **Open Form**, or double-click on the form.



- Select the data to update and update the data in the cell.

The previous example for CalPlan showed how to update **_10654 > Restricted Regents FFE - Plan** from 2,664 to 5,000. This example shows how to update the same intersection from 5,000 to 6,000, using Smart View.

Before

	A	B	C	D	U	V
10	1_10653 - BAHSB Student Aid Undergrad	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	2964	
11		Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	15036	
12	1_10654 - BAHSB Student Aid General	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	4073	
13		Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	5000	
14	1_10206 - BAHSB ACAF Gen Ops	19900 - GENERAL FUNDS	C1 - Summary - Plan	71110 - General Allocation	499524	
15				Transfers Offset - DivInternal - Plan	-499524	
16				71110 - General Allocation	118867	

After

	A	B	C	D	U	V
10	1_10653 - BAHSB Student Aid Undergrad	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	2964	
11		Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	15036	
12	1_10654 - BAHSB Student Aid General	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	4073	
13		Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	6000	
14	1_10206 - BAHSB ACAF Gen Ops	19900 - GENERAL FUNDS	C1 - Summary - Plan	71110 - General Allocation	499524	

After entering 6,000 you will notice a color change on the cell, which means that the data has been entered into the form but not been saved yet.

- Click **Submit Data** button

Book3 - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Developer Smart View Planning Acrobat

Cell Actions Adjust More Approvals
 Lock Drill-through Copy Version
 Calculate Submit Data Workflow

POV Intersection Form - Tabs - hypp-qa06_CalPlan_2
 MyOrg:1_HAAS3 Current Scenario:Forecast Current Stage:Working Current Year of View:FY14 Refresh

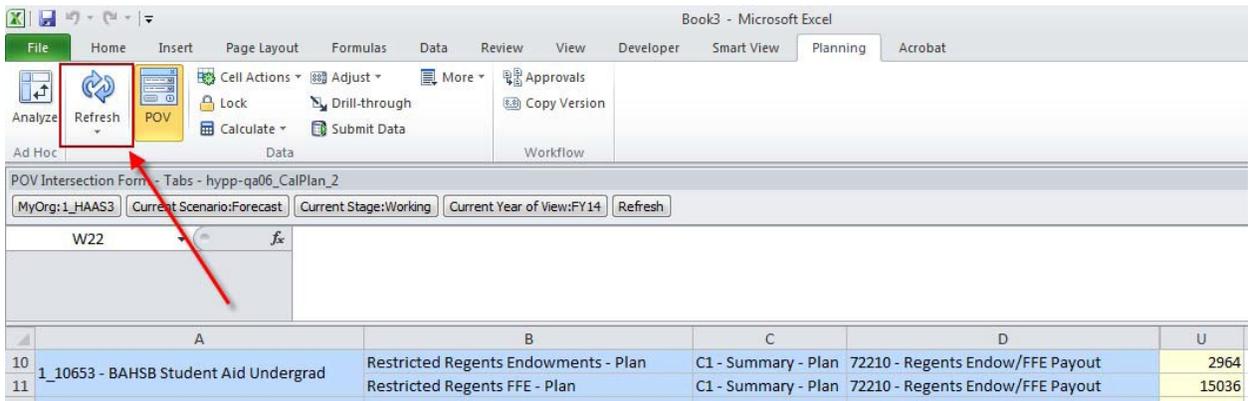
U14 499524

	A	B	C	D	U	V
10	1_10653 - BAHSB Student Aid Undergrad	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	2964	
11		Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	15036	
12	1_10654 - BAHSB Student Aid General	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	4073	
13		Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	6000	
14	1_10206 - BAHSB ACAF Gen Ops	19900 - GENERAL FUNDS	C1 - Summary - Plan	71110 - General Allocation	499524	
15				Transfers Offset - DivInternal - Plan	-499524	

Unlike CalPlan, there is no confirmation pop up that the data is saved and the AggEntity business rule is run successfully. If the data has been saved and the AggEntity business rule is run successfully, the color of the cell should be the same as the rest of the data values.

1_10653 - BAHSB Student Aid Undergrad	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	2964
	Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	15036
1_10654 - BAHSB Student Aid General	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	4073
	Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	6000
1_10206 - BAHSB ACAE Gen Ops	19900 - GENFRAI FUNDS	C1 - Summary - Plan	71110 - General Allocation	499524

To confirm that the data has been saved and the AggEntity business rule has run successfully, click on the **Refresh** button.

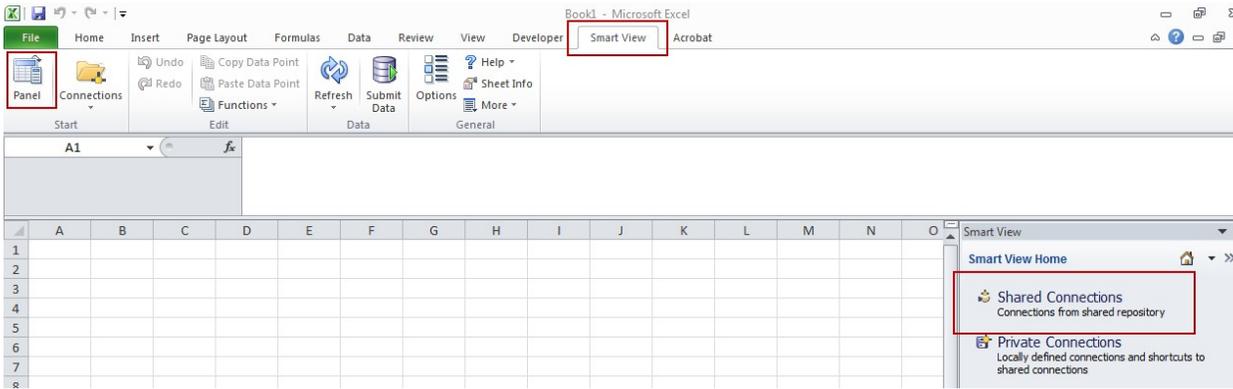


You have successfully edited data in an Intersection Form using Smart View.

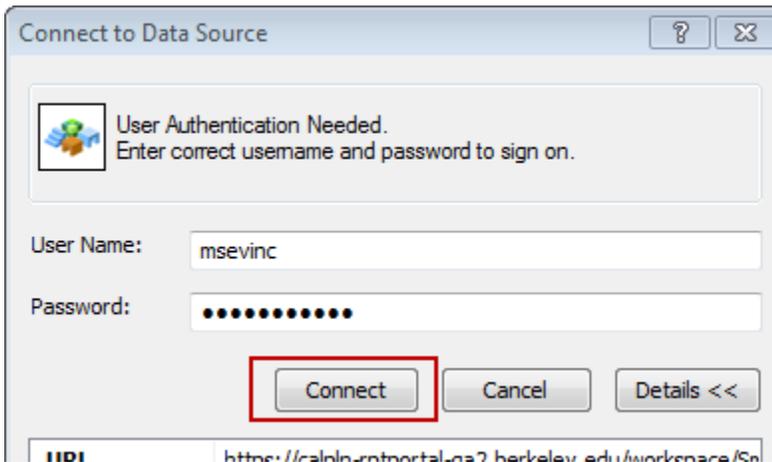
Add an Intersection Row into Intersection Form Using Smart View

Follow the steps below to enter data into the Intersection Forms using Smart View.

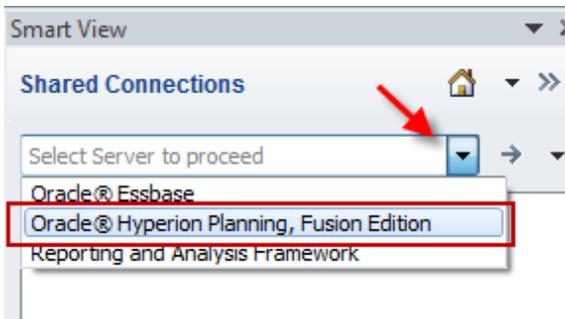
Menu Path: Use the following menu path in Excel: Click on **Smart View > Panel > Shared Connections**



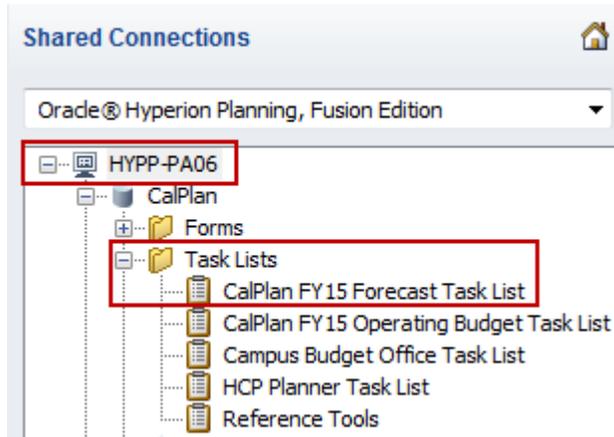
1. Enter User Name and Password. Click **Connect**



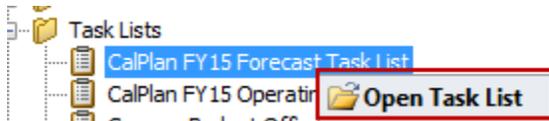
2. Click on the drop down menu arrow, to the right of the box that reads “Select Server to proceed”. Select **Oracle Hyperion Planning, Fusion Edition** option in Shared Connections:



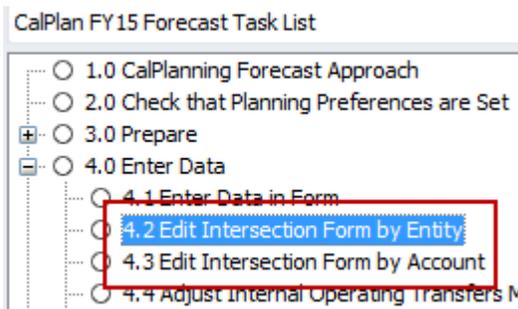
- 3. Expand HYPP-PA06 > CalPlan > Task Lists
- 4. Navigate to the CalPlan FY15 Forecast Task List



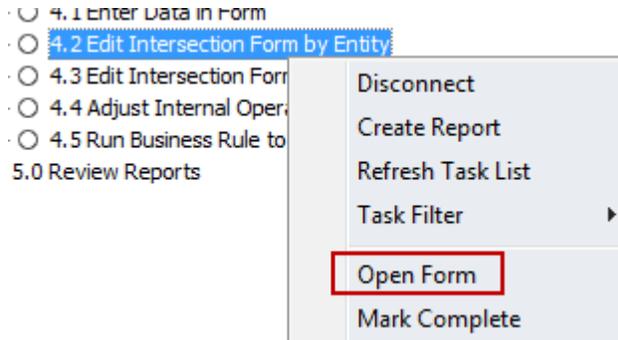
- 5. Right click on CalPlan FY15 Forecast Task List and click on Open Task List.



Once the Task List is opened, navigate to the **Edit Intersection Form by Entity** or **Edit Intersection Form by Account** task list that is located under 4.0 Enter Data:



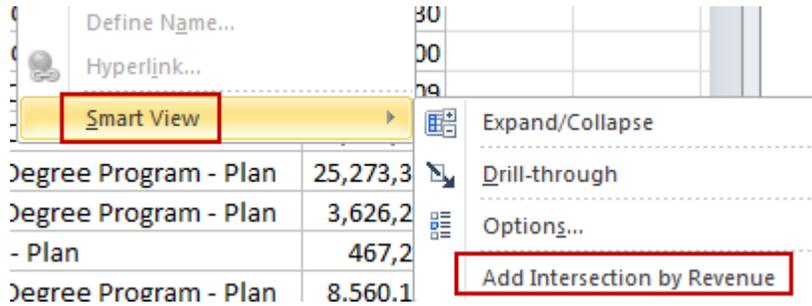
6. Right click on the task list and click on **Open Form**, or double-click on the form.



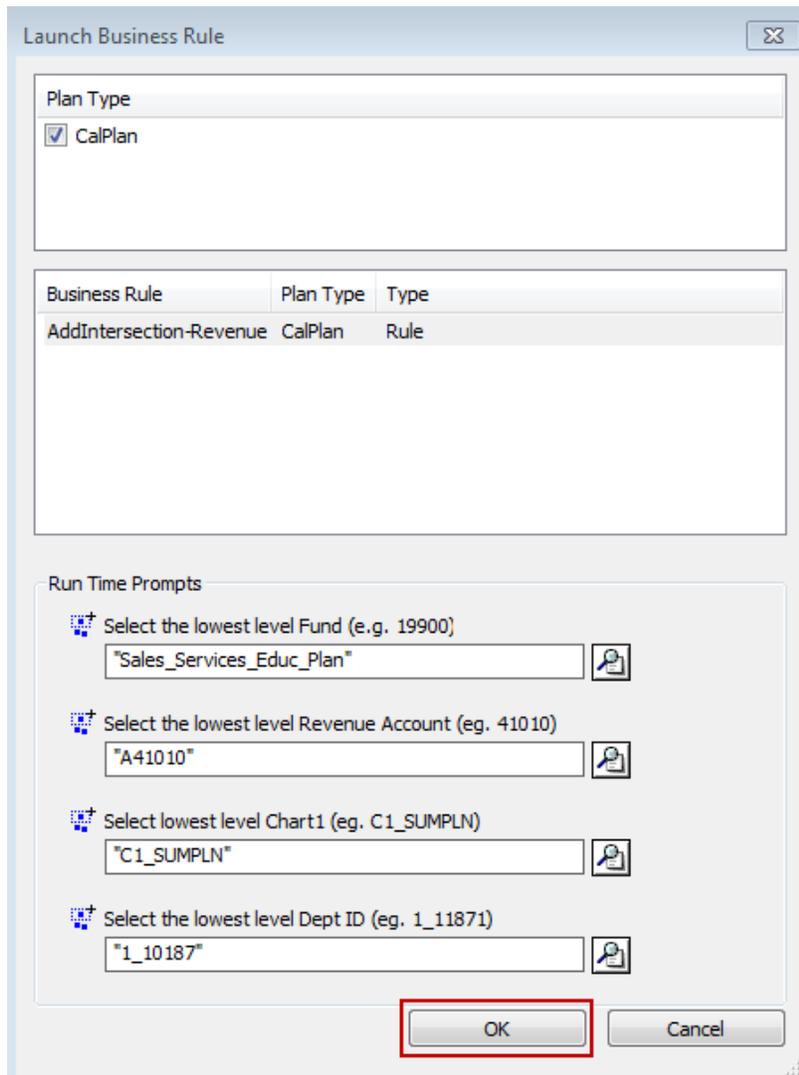
7. The form will open in Smart View.

POV Intersection Form by Entity - HVPP-PA06_CalPlan_1						
MyOrg:1_HAAS3 Current Scenario:Forecast Current Stage:Working Current Year of View:FY15 Refresh						
D2 46XXX - Sales Services & Other Income - Plan						
A	B	C	D	U	V	W
				+YearTotal		
1						
2	1_10187 - BAHSB Devel Alumni Relations	Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	141,360	
3		Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	151,125	
4	1_10650 - BAHSB Student Aid FTMBA	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	476,262	
5		Restricted Endowments and FFEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	258,000	
6	1_10651 - BAHSB Student Aid SelfSupp MBA	Restricted Endowments and FFEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	175,750	
7	1_10208 - BAHSB Berk Innov Ldr Dev-BILD	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	43,875	
8		Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	139,500	
9	1_10314 - BAHSB Instr MFE Gen Ops	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	9,750	
10		Restricted Endowments and FFEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	54,000	
11	1_10249 - BAHSB Instr MBA Gen Ops	Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	3,943	
12	1_10250 - BAHSB Instr MBA SS Wkshp	Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	60,450	
13	1_10286 - BAHSB Instr UG Gen Ops	Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	6,984	
14		Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	1,200	
15	1_10545 - BAHSB Acad Visiting Schols	Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	33,852	
16	1_10196 - BAHSB Devel Annual Giving	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	3,753,750	
17	1_10521 - BAHSB Endow Chr & Disting Prof	Restricted Endowments and FFEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	2,315,048	
18		Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	10,230	
19	1_10582 - BAHSB Prov General	60351 - Center for Exec Education	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	5,000,000	
20		Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	1,590,509	
21		Restricted Endowments and FFEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	1,091,297	
22		20150 - EVENING MBA-HAAS FEE	C1 - Summary - Plan	4055X - Self-Supporting Degree Program - Plan	25,273,384	
23		20151 - MFE Degree Fee	C1 - Summary - Plan	4055X - Self-Supporting Degree Program - Plan	3,626,223	
24	1_10584 - BAHSB Student Fee Revenue	20152 - MBA Application Fee	C1 - Summary - Plan	401XX- Application Fees - Plan	467,200	
25		20154 - Berkeley Exec MBA Degree Fee	C1 - Summary - Plan	4055X - Self-Supporting Degree Program - Plan	8,560,186	
26		20231 - PD Supp Tuition - Bus Adm/Mgmt	C1 - Summary - Plan	4053X - Professional Degree Fees - Plan	21,470,950	
27		20266 - HAAS Summer Fees	C1 - Summary - Plan	4055X - Self-Supporting Degree Program - Plan	192,000	
28	1_10335 - BCHCI Energy & Envir Innov Ctr	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	156,000	

8. Add an intersection row into the form in Smart View by right-clicking anywhere in the form. Navigate to **Smart View** -> **Add Intersection by [Account]**



9. The “Launch Business Rule” window appears. Fill in the fields as necessary and click **OK**. Be sure to select the lowest level members in each field. Otherwise, the business rule will not create a new intersection.



10. The intersection for will add a new row with \$0.

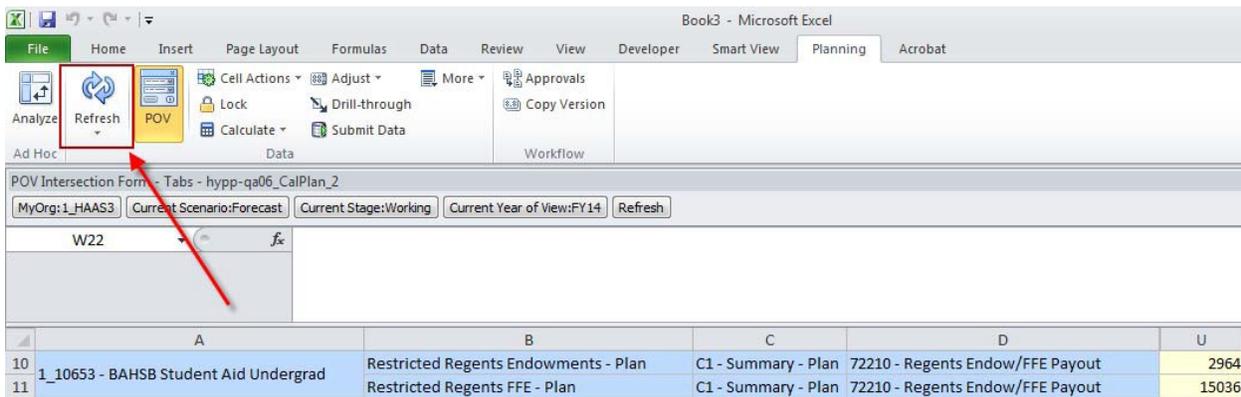
	A	B	C	D	U
					+YearTotal
1					
2					
3	1_10187 - BAHSB Devel Alumni Relations	Sales and Services Educational - Plan	C1 - Summary - Plan	41010 - State General Support	0
4		Restricted Gifts - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	141,360
5	1_10650 - BAHSB Student Aid FT MBA	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	151,125
6		Restricted Endowments and FFEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	476,262
7	1_10651 - BAHSB Student Aid Self-Sup MBA	Restricted Endowments and FFEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	258,000
8					175,750

11. Update the amount in the new intersection row. You may notice a color change on the edited cell, which means that the data has been entered into the form but has not been saved yet. Select **Submit Data**.



Unlike CalPlan, there is no confirmation that the data is saved and that the AggEntity business rule is run successfully. If the data has been saved and the AggEntity business rule is run successfully, the color of the cell should revert back to the same color as the rest of the data values.

To confirm the update was successful, refresh the page by clicking on the **Refresh** button:



You have successfully added an intersection row into an Intersection Form using Smart View.