Updated 2/10/15

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

- Navigate to the Intersection Forms
- Enter data into the Intersection Forms using CalPlan
- Add an intersection row directly into the Intersection Forms
- Enter data into the Intersection Forms using Smart View
- 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 <u>calplanhelp@berkeley.edu</u>.



Navigating to the Intersection Forms

Intersection Form by Entity

- 1. Log into CalPlanning and navigate to your CalPlan Task Lists
- 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
- 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.

 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 Interse	ection Form - Transfers Intersection Form - C	Comp Expense Inter	rsection Form - Non-Comp Expense	Intersect	ion Form - Cha	inges in Fund Ba
					YearTotal	
1_10187 - BAHSB Devel Alumni Relations	Sales and Services Other Revenue - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Inc	ome - Plan	0	
1_10373 - BAHSB B&O Haas Gear	66350 - Generic Revenue-Other Sources	C1 - Summary - Plan	48XXX - Other Income - Plan		(22)	
	Sales and Services Other Revenue - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Inc	ome - Plan	21,855	
1_10375 - BAHSB B&O Cafe	Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Inc	ome - Plan	42,393	
1_10464 - BAHSB Exec Ed Custom	60351 - Center for Exec Education	C1 - Summary - Plan	495XX - Nonoperating Rev/Exp-Oth	er - Plan	1,200,000	
1_10652 - BAHSB Student Aid PhD	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Us	e - Plan	133,792	
1_10653 - BAHSB Student Aid Undergrad	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Us	e - Plan	48,740	
	Restricted Foundation Endowments - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Us	e - Plan	115,016	
1_10654 - BAHSB Student Aid General	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Us	e - Plan	50,000	
	Restricted Foundation Endowments - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Us	e - Plan	3,976	
	Restricted Foundation FFE - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Us	e - Plan	483	
1_10208 - BAHSB Berk Innov Ldr Dev-BILD	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Us	e - Plan	45,000	
1_10314 - BAHSB Instr MFE Gen Ops	60344 - HAAS: CTR FOR EXEC DEVELOPMENT	C1 - Summary - Plan	404XX - SS and Special Programs R	ev - Plan	139,500	
	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Us	e - Plan	9,750	
	Restricted Foundation Endowments - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Us	e - Plan	13,000	

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

Intersection Form - Revenue Intersec	tion Form - Transfers	Intersection Form	- Comp Expense	Intersection Form - Non-Comp Expense In	tersection Form -	Changes in Fund
					YearTotal	
1_10534 - BAHSB Acad Faculty Gen Ops	20150 - EVENING M	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 Degre	e 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 T	uition - Bus Adm/Mgmt	C1 - Summary - Plan	50210 - Faculty	555,000	
				53010 - Faculty Benefits	144,855	
				57310 - General & Empl Liability Insur	4,718	
	19900 - GENERAL F	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 F	FUNDS	C1 - Summary - Plan	51210 - Staff-Non student	572,279	
			1996 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -	520XX - Other Employee Compensation - Pl	an O	
				53020 - Staff Non student Benefits	229,484	
				57310 - General & Empl Liability Insur	4,864	4

- **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	Interse	tion Form - Transfers	Intersection For	m - Comp Expense		Intersection Form - Non-Comp Expense	Intersection Form - C
							YearTotal
1_10654 - BAHSB Student Aid G	General	Restricted Regents Endo	wments - 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
			2	120 2	-1		



<u>After</u>

Intersection Form - Revenue	Intersecti	ion Form - Transfers	Intersection Form	n - Comp Expense	Intersection Form - Non-Comp Expense	Intersection For
						YearTotal
1_10654 - BAHSB Student Aid	General	Restricted Regents Endo	wments - Plan	C1 - Summary - Plar	72210 - Regents Endow/FFE Payout	4,073
		Restricted Regents FFE	- Plan	C1 - Summary - Plar	72210 - Regents Endow/FFE Payout	5,000
4 40000 04000 4045 0		ADDDD CENERAL EURO	c	or c pl	Trees of Lall II	400 504

3. Click Save.

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HomePage Explore: /Users	/msevinc/Reports CalPlan - Task List Status *
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• Manage Task Lists	Task - Run Intersection Form-Intersection Form - Tabs Task Instructions
My Tack List	

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.



3. 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.

Runtime Prompts - AddIntersection-Revenue		×
Prompt Text	Value	
* Select the lowest level Fund (e.g. 19900)	"Unrestricted_Plan"	¥.,
📑 * Select the lowest level Revenue Account (eg. 41010)	"A4053X_Plan"	Ŵ.
🐺 * Select lowest level Chart1 (eg. C1_SUMPLN)	"C1_SUMPLN"	¥.,
🐺 * Select the lowest level Dept ID (eg. 1_11871)	"1_11865"	VI.
	Launch	Cancel
	Launch	Cancel

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.

- 4. Once a unique combination of lowest level members is selected, click Launch.
- **5.** 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.

(i) Information	×
AddIntersection-Revenue was successful.	
	OK



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

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

	WyOrg: 1_BOALT	🖓 🔤 Current Scenario: F	orecast	📦 📄 Current Stage: Working	6
	Intersection Form by Entity -	Revenue Intersection Form by Entity	/ - Transfers Inters	ection Form by Entity - Comp Expense Interse	ction Form by B
	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
				440XX - Private Gifts for Current Use - Plan	6,500
				46XXX - Sales Services & Other Income - Plan	2,152,500
		Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	4,730,250
l		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.

(i) Information	×
Messages for this page are listed below. (i) The data has been saved.	
i Rule was run successfully	
	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

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1. Enter User Name and Password. Click Connect.

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User Name:	msevinc
Password:	•••••
	Connect Cancel Details <<
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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.





8. 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

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<u>After</u>

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	
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	
19900 - GENERAL EUNDS	C1 - Summary - Plan	71110 - General Allocation	499524	-
	Restricted Regents Endowments - Plan Restricted Regents FFE - Plan Restricted Regents Endowments - Plan Restricted Regents FFE - Plan	Restricted Regents Endowments - Plan C1 - Summary - Plan Restricted Regents FFE - Plan C1 - Summary - Plan Restricted Regents Endowments - Plan C1 - Summary - Plan Restricted Regents FFE - Plan C1 - Summary - Plan 19900 - GENERAL FUNDS C1 - Summary - Plan	Restricted Regents Endowments - Plan C1 - Summary - Plan 72210 - Regents Endow/FFE Payout Restricted Regents FFE - Plan C1 - Summary - Plan 72210 - Regents Endow/FFE Payout Restricted Regents Endowments - Plan C1 - Summary - Plan 72210 - Regents Endow/FFE Payout Restricted Regents FFE - Plan C1 - Summary - Plan 72210 - Regents Endow/FFE Payout Restricted Regents FFE - Plan C1 - Summary - Plan 72210 - Regents Endow/FFE Payout 19900 - GENERAL FUNDS C1 - Summary - Plan 7110 - General Allocation	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 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 4000 19900 - GENERAL FUNDS C1 - Summary - Plan 7110 - 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.

9. Click Submit Data button

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POV Interse	ection Form - Tal	os - hypp-qa06_CalP	lan_2	~								
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l	U14 •	• (* fx 4	499524			/						
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10 1 106	53 - BAHSB Stu	dent Aid Undergr	Restri	icted Rege	ents End	owments	- Plan	C1 - Summary	- Plan 7	72210 - Regents Endow/FFE Payout	2964	
11 1.100	55 - DA1155 510	dent Ald ondergi	Restri	icted Rege	ents FFE	- Plan		C1 - Summary	- Plan 7	72210 - Regents Endow/FFE Payout	15036	
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13	04 - DA1150 510	dent Ald General	Restri	icted Rege	ents FFE	- Plan		C1 - Summary	- Plan 7	72210 - Regents Endow/FFE Payout	6000	
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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 10552 PAUSE Student Aid Undergrad	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	2964
1_10035 - BAHSB Student Ald Ondergrad	Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	15036
1 10554 PAUSE Student Aid Conoral	Restricted Regents Endowments - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	4073
1_10034 - BAHSB Student Ald General	Restricted Regents FFE - Plan	C1 - Summary - Plan	72210 - Regents Endow/FFE Payout	6000
1 10206 - BAHSB ACAF Gen Ops	19900 - GENERAL 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.

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File	Home	Insert	Page Layout	Formulas	Data	Review	View	Developer	Smart View	Plannin	g Acrobat	
Analyze	Refresh	POV	₩ Cell Actions * Lock Calculate *	ඎ Adjust ▼ ∑ Drill-through Submit Data	📃 More	▼ \$\$A ®® C	pprovals opy Version					
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		1	A			В			С		D	U
10 1	0652 - BAL	ISB Stude	ant Aid Underg	Restric	ted Rege	nts End	owments -	- Plan	C1 - Summary	- Plan 7	2210 - Regents Endow/FFE Payout	2964
11 -	10000 - BAI	135 3100	ent Ala Onderg	Restric	ted Rege	nts FFE	- Plan		C1 - Summary	- Plan 7	2210 - Regents Endow/FFE Payout	15036

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

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1. Enter User Name and Password. Click Connect

Connect to Data	Source ? 🔀
User AL Enter co	thentication Needed. prrect username and password to sign on.
User Name:	msevinc
Password:	•••••
	Connect Cancel Details <<
IIDI	https://calplo.cotportal.ga? herkeley.edu/workenace/So

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:

CalPlan FY15 Forecast Task List





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 Inter	rsection Form by Entity - HYPP-PA06 CalPlan	1						
MyOrg:1	HAAS3 Current Scenario:Forecast Current	Stage:Working Current Year of View:FY15 Refresh						
		Salas Santias & Other Income Blan						
		- Sales Services & Other Income - Plan						
		-						
	А	В	C	U	U	V	vv	Smart Viev
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1								Server
2		Sales and Services Educational - Plan	C1 - Summany - Plan	46XXX - Sales Services & Other Income - Plan	141 360			Applica
3 1_10	0187 - BAHSB Devel Alumni Relations	Restricted Gifts - Plan	C1 - Summary - Plan	40XX - Sales Services & Other Income - Plan	151 125			CalPlan F)
4		Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	476 262			01.0
5 1_10	0650 - BAHSB Student Aid FTMBA	Restricted Endowments and FEEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	258,000			0 2.0
6 1 10) 651 - BAHSB Student Aid SelfSupp MBA	Restricted Endowments and FEEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	175,750			= ⊡ ○ 3.0
7 1 10	208 - BAHSB Berk Innov I dr 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			- C
9 1 10	0314 - 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			- C
11 1 10	0249 - BAHSB Instr MBA Gen Ops	Sales and Services Educational - Plan	, C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	3,943			B 0.50
12 1 10	0250 - BAHSB Instr MBA SS Wkshp	Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	60,450			
13		Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	6,984			
14 1_10	J286 - BAHSB Instr UG Gen Ops	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	1,200			
15 1_10	0545 - BAHSB Acad Visiting Schols	Sales and Services Educational - Plan	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	33,852			
16 1_10	0196 - BAHSB Devel Annual Giving	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	3,753,750			
17 1_10	0521 - 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 10	582 RAUSE Brow Conoral	60351 - Center for Exec Education	C1 - Summary - Plan	46XXX - Sales Services & Other Income - Plan	5,000,000			
20	J362 - BAH3B PTOV General	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			Open F
24 1 10	1584 - BAHSB Student Fee Revenue	20152 - MBA Application Fee	C1 - Summary - Plan	401XX- Application Fees - Plan	467,200			Mark Co Task Det
25	Sold - Ballob Student Lee Nevenue	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			Task List
27		20266 - HAAS Summer Fees	C1 - Summary - Plan	4055X - Self-Supporting Degree Program - Plan	192,000			20
28 1 10	1335 - BCHCLEnergy & Envir Innov Ctr	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	156,000			▼ 0% Comple
H A F I	Intersection Form by Entity -~1	Intersection Form by Entity -~2 / Intersection	Form by Entity -~3	Intersection Form by Entity -~4 / Intersection F	orm by Entity -			

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	Define N <u>a</u> me		30	
9	Hyperl <u>i</u> nk		D0	
	Emart Minut		ng E	E 1/5 1
	Smart view		■	Expand/Collapse
Degr	ee Program - Plan	25,273,3	۵,	<u>D</u> rill-through
Degr	ee Program - Plan	3,626,2	=	Options
- Pla	n	467,2		
Degr	ee Program - Plan	8.560.1		Add Intersection by Revenue

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.

aunch Business Rule			23
Plan Type			
CalPlan			
During Data	DI T	-	
Business Rule	Plan Type	Type	
AddIntersection-Revenue	CalPlan	Rule	
Run Time Prompts	vel Fund (e.,	g. 19900)	
"Sales Services Ed	duc Plan"	 A	
The select the lowest let	vel Revenue	Account (eg. 41010)	
"A41010"		2	
Select lowest level (Chart1 (eg. (C1_SUMPLN)	
"C1 SUMPLN"		 	
📫 Select the lowest le	vel Dept ID ((eg. 1_11871)	
"1_10187"		と	
		ОК	Cancel



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

PO	/ Intersection Form by Entity - HYPP-PA06_CalPlan_1					
My	Org:1_HAAS3 Current Scenario:Forecast Current Sta	age:Working Current Year of View:FY15 Refresh				
	D6 🔻 🦱 🏂 440XX - 1	Private Gifts for Current Use - Plan				
	А	В	С	D	U	
					+YearTotal	
1						
2		Sales and Services Educational Dian	C1 Summany Blan	41010 - State General Support	0	
3	1_10187 - BAHSB Devel Alumni Relations	Sales and Services Educational - Plan	CI - Summary - Plan	46XXX - Sales Services & Other Income - Plan	141,360	
4		Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	151,125	,
5	1 10650 RAHSP Student Aid ETMPA	Restricted Gifts - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	476,262	
6	1_10050 - BAHSB Studelit Ald FIMBA	Restricted Endowments and FFEs - Plan	C1 - Summary - Plan	440XX - Private Gifts for Current Use - Plan	258,000	
7	1 10651 DALIED Student Aid Colfering MADA	Destricted Endowments and EEEs Dian	C1 Cummony Dian	440VV Drivata Cifts for Current Lice Dian	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:

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File	Home	Insert	Page Layout	Formulas	Data	Review	View	Developer	Smart View	Planning	Acrobat	
Analyze	Refresh	POV	🐯 Cell Actions 🛪 🔒 Lock 🖬 Calculate 🛪	 Adjust * Drill-through Submit Data 	📃 More	- ₽₽A ®® C	pprovals opy Version					
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MyOrg: 1	HAAS3	Current Sce	enario:Forecast	Current Stage:Work	king Curre	ent Year o	f View:FY14	Refresh				
	W22	7	• f _x									
1			A	1		В			С	(L.	D	U
10 1 10	652 - RAH	ISB Stud	ant Aid Under	Restrie	cted Rege	nts End	owments	- Plan	C1 - Summary	- Plan 72	2210 - Regents Endow/FFE Payout	2964
11 10	UJJ - DAF	isb stuu	ent Ala Underg	Restrie	cted Rege	nts FFE	- Plan		C1 - Summary	- Plan 72	2210 - Regents Endow/FFE Payout	15036

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

