


## Excel Formulas in Forms

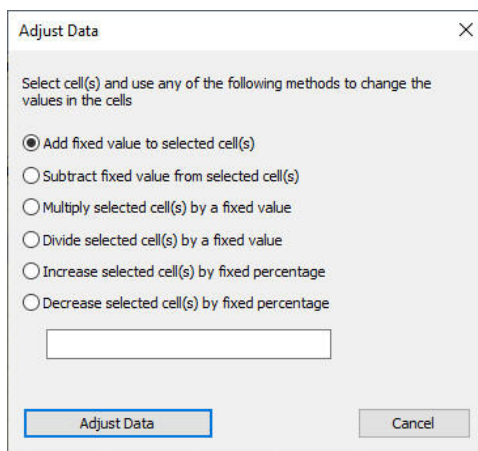
You can create Excel formulas in cells inside or outside the grid (form) if the cells are not read-only or locked. When you Submit Data, the results of any formulas in the grid are loaded to CalPlan (or HCP).

A calculation formula may be mathematical, e.g.  $23 * 17$ , or it may reference other cells. For example, if you expect an expense to increase by 5% in the coming year, you could create a formula in the Operating Budget that references a cell in the Forecast such as  $=E5 * 1.05$ .

Formulas are preserved in forms when you submit data, refresh the form, later open the saved worksheet, and when you expand or collapse rows and columns. If you move a referential formula such as  $=E5 * 1.05$ , its cell references are updated to reflect the new location.

## Adjust Data

If the data in the Operating Budget has been copied from the Forecast, another way to add a 5% increase is to use the Adjust feature. From the Planning ribbon, click the Adjust icon  Adjust, select whether you want to increase or decrease by a fixed value or a percentage, enter the amount as a whole number, e.g. 5 for 5%, and click the Adjust Data button.



The image shows a dialog box titled "Adjust Data" with a close button (X) in the top right corner. Inside the dialog, there is a text label: "Select cell(s) and use any of the following methods to change the values in the cells". Below this label are six radio button options:

- ☒ Add fixed value to selected cell(s)
- ☐ Subtract fixed value from selected cell(s)
- ☐ Multiply selected cell(s) by a fixed value
- ☐ Divide selected cell(s) by a fixed value
- ☐ Increase selected cell(s) by fixed percentage
- ☐ Decrease selected cell(s) by fixed percentage

Below the radio buttons is a text input field. At the bottom of the dialog are two buttons: "Adjust Data" and "Cancel".

The result of the adjustment is entered in the cell(s) and shown in edit mode. To save the changes in CalPlanning, click the Submit Data icon.

## Preserve Formula on POV Change

In CalPlan, the Update Data in Form allows you to change POV. If you have created a formula within the form for a specific DeptID, Account, Fund, and Chart1 and want that formula to persist when you change the DeptID (or any other dimension in the POV), check the Preserve Formula on POV Change box in the Member Options panel of the Options dialog box.

Remember, options you set are specific to a sheet unless you selected Save as Default Options or Apply to All Sheets when you saved the settings in the Options dialog box.

### Form Data May Change After Actuals are Loaded



Each month following the close, Actual data from BFS is loaded into the Working version. If there are actuals for a combination of Account, DeptID, Fund, and Chart1 that did not previously exist in the plan, a new row will be added to the form when you Refresh