

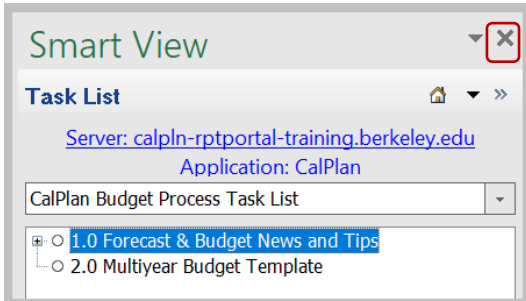
# Smart View for Planning

## Exercise 3: Enter Data in a Smart View Form

In this exercise, you will enter data into a Smart View form and make edits. You should have the Account Entity form open from Exercise 1. If you don't have it open, refer back to Exercise 1 and open that form.

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|  | <p>For the training, you should be working in the Training environment. If you have switched back to Production since Exercise 1, you'll need to disconnect from the server and return to Training. To disconnect, go to the Panel and click the drop-down arrow next to the house icon and click on Disconnect All.</p> <p>To connect to Training, go to the Smart View ribbon and select the Options button.</p> <p>From the left panel, select Advanced.</p> <p>Shared Connections URL:<br/><a href="https://calpln-rptportal-training.berkeley.edu/workspace/SmartViewProviders">https://calpln-rptportal-training.berkeley.edu/workspace/SmartViewProviders</a></p> |
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1. To create more space to view the form, close the Panel by clicking the X in the upper-right corner.



2. Navigate to Non-Comp Expenses by clicking the AIF - Non-Comp Expense tab at the bottom of the window.
3. Click on a cell with a light yellow background that you would like to modify. It can be blank or have a value.
4. Type the new value in the cell and press [Enter] or click on another cell. The background color changes to dark yellow.
5. Select the Submit Data button to save this change to the CalPlan database. You can find a Submit Data button on both the Smart View and Planning ribbons; either one will work.
6. In this next step, you will paste a range of data into the form. Identify one or more rows and columns of data that you would like to update. Open a new Excel sheet and type in the data you'd like to paste into your plan. Copy the data using the keyboard, mouse, or button.

| Keyboard   | Mouse | Icon      |
|------------|-------|-----------|
| [Ctrl + C] | Copy  | Copy icon |

7. Go to the Account Intersection Form and click on the first cell in the range where you want to paste. Paste the data using the keyboard, mouse, or button.

| Keyboard   | Mouse | Icon       |
|------------|-------|------------|
| [Ctrl + V] | Paste | Paste icon |

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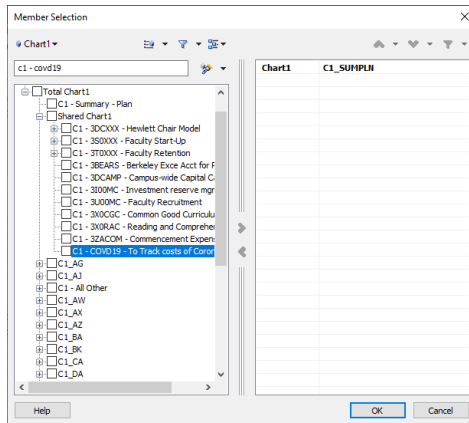
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8. Click the Submit Data icon to save these changes to the database. Note that the background color changed back to light yellow.
9. Use Excel commands to change the way you view the form online. You can:
  - Change column widths
  - Hide or unhide columns
  - Zoom in or out
  - Freeze panes
10. It is possible to use Excel's filtering function, but not from the Data menu or Filter icon
  - Select a DeptID in the form and right-click
  - Select Filter from the quick menu
  - Select Filter by Selected Cell's value
11. To remove the filter:
  - Click the ▾ in cell B1 to open the Filter dialog box
  - Select Clear Filter From "(Column B)"
12. Occasionally you will have plan data to enter for an intersection that does not exist in the form. In this case, you'll need to add an intersection. Follow these steps to add an intersection for 550XX – General Supplies for Unrestricted Fund for C1 - COVID19 Chart1:
  - Find a DeptID that does not have a row for 550XX – General Supplies, Unrestricted, C1 - COVID19 and right-click.
  - Select Smart View from the quick menu and then select Add Intersection by Non-Comp Expense. The Launch Business Rule dialog box opens

| Business Rule                   | Plan Type | Type |
|---------------------------------|-----------|------|
| AddIntersection-Non-CompExpense | CalPlan   | Rule |

- Review the Fund, Account, and Entity to be sure they are what you want. Change the member if needed
- Click the Member Selection button for Chart1

# Smart View for Planning



- Type C1 – COVID19 in the text box and press [Enter] to search
- Check the box for C1 – COVID19 – To track costs of Coronavirus, click the right arrow to move the member to the selection pane, and click OK

CalPlan runs the rule to create the intersection and displays the form with the newly added intersection.

End of exercise