CalPlan Drill Through - Account Details

Introduction

The new Drill Through - Account Details CalPlan form allows users to plan and review plans at the account level across all Entities, Funds and Chart1.

The form provides an easy way to navigate from high level Entity, Fund and Chart1 for a single account to the lowest level of details of planning data for that particular account. The Form also allows users to go back to the high level through clicking on the breadcrumbs provided in the top of the navigated form.

When would I use this new functionality?

We recommend the following as a best practice:
- If you want to input update on multiple entities under an org node
- If you want to make quick update to your forecast data for a single account across multiple Entities, Funds or Chart1
- If you want to review your forecast data for a single account across multiple entities

Where can I see this new functionality?

1. Login to CalPlan
3. Click on Drill Through - Account Details and the form will open
4. Select your point-of-view (POV) and then click on the arrow (highlighted in green)
5. The form will be displayed in Year Total and there is (+) next to the YearTotal you can click on the (+) to expand the form to the monthly display.
6. Select any of the accounts on the form and right-click.
7. Select Acct Details by POV - This action will take the account selected and the DeptID, Fund, and Chart1 and open a new form (Acct Details by POV).

8. Acct Details by POV will contain the lowest level of details by DeptID, Fund, and Chart1.

9. The form will be displayed in Year Total and there is (+) next to the YearTotal you can click on the (+) to expand the form to the monthly display.

10. You can update your forecast -Working and/or Operating Budget-Working in this form and click save.

11. You can always navigate back to the Drill Through - Account Details form by clicking on the bread crumb (highlighted in green in the above screenshot).