

# 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

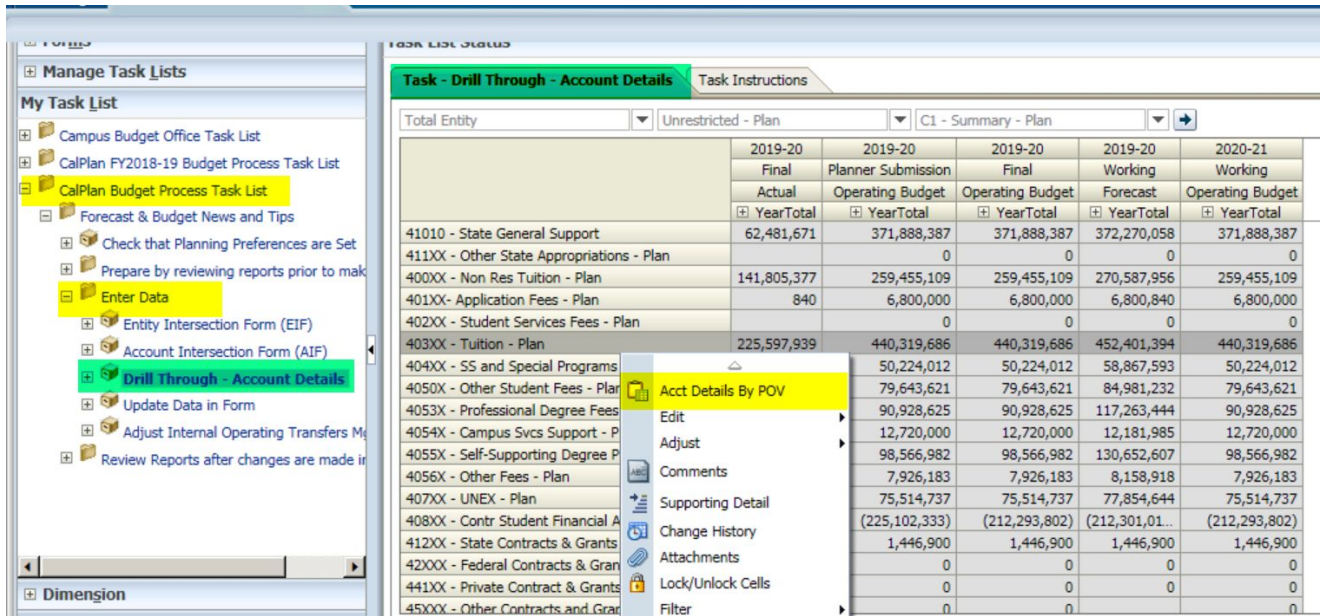
## Where can I see this new functionality?

1. Login to CalPlan
2. Navigate to My Task List -> CalPlan Budget Process Task List > Drill Through - Account Details
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.

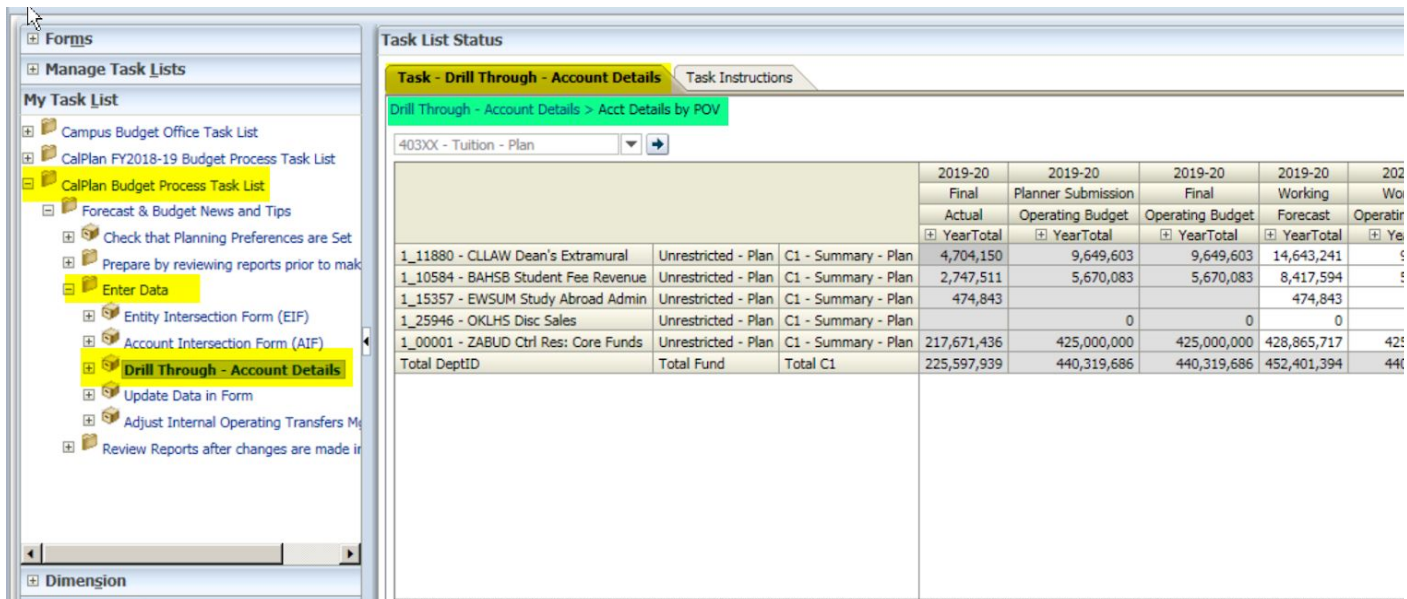
Total Entity	Unrestricted - Plan		CI - Summary - Plan		2020-21 Working Operating Budget
	2019-20 Actual	2019-20 Planner Submission Operating Budget	2019-20 Final Operating Budget	2019-20 Forecast	
	<b>YearTotal</b>	<b>YearTotal</b>	<b>YearTotal</b>	<b>YearTotal</b>	<b>YearTotal</b>
41010 - State General Support	62,481,671	371,888,387	371,888,387	372,270,058	371,888,387
411XX - Other State Appropriations - Plan		0	0	0	0
400XX - Non Res Tuition - Plan	141,805,377	259,455,109	259,455,109	270,587,956	259,455,109
401XX - Application Fees - Plan	840	6,800,000	6,800,000	6,800,840	6,800,000
402XX - Student Services Fees - Plan		0	0	0	0
403XX - Tuition - Plan	225,597,939	440,319,686	440,319,686	452,401,394	440,319,686
404XX - SS and Special Programs Rev - Plan	38,691,068	50,224,012	50,224,012	58,867,593	50,224,012
4050X - Other Student Fees - Plan	43,673,667	79,643,621	79,643,621	84,981,232	79,643,621
4053X - Professional Degree Fees - Plan	46,867,914	90,928,625	90,928,625	117,263,444	90,928,625
4054X - Campus Svcs Support - Plan	5,816,274	12,720,000	12,720,000	12,181,985	12,720,000
4055X - Self-Supporting Degree Program - Plan	47,878,218	98,566,982	98,566,982	130,652,607	98,566,982

6. Select any of the accounts on the form and right-click.

- 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).



- Acct Details by POV will contain the lowest level of details by DeptID, Fund, and Chart1.
- 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.
- You can update your forecast -Working and/or Operating Budget-Working in this form and click save.



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