Drag and Drop to Add or Remove Drill-Down

Important Points about Adding Drill-down in Rows or Columns

- There are several methods available using the Analysis tab within the Design Panel for adding a field as drill-down within the rows or columns on the crosstab of the workbook results.

- The additional fields may be added as drill-down by using drag and drop functionality along with the Design Panel to add the data down the results in rows or across the results in columns.

- The fields to add as rows and columns will vary depending on the query chosen and the members (Data Source fields) and measures (columns that can be totaled like Amounts) available in the Design Panel.

- Drag and drop functionality CANNOT be used to remove a drill-down from the crosstab results once added. Any drill-down must be removed using the sections on the Design Panel.
Drag and Drop to Add Drill-Down (cont.)

Add or Remove Drill-Down in Rows Such as Adding Commitment Items (G/L Accounts) Down the Results

Note: In this example, the Commitment Item (G/L Account) is being added as data “down” the report in the rows of the Fund Trial Balance query results.

Note: As a reminder, workbooks must be refreshed after opening before options are available.

1. Ensure the Display Design Panel AND Property View are selected (refer to Using the Design Panel to Analyze and Format a Workbook for details).

   Note: The Property View cannot be selected unless the Display Design Panel option is already selected to display in a workbook. The Property view will help as you add drill-down by rows or columns to quickly format those columns or rows as needed.
2. To add the drill-down in rows by using drag and drop, choose one of these two options:

- **Drag and drop directly into the crosstab results** - Click on the member / field listed under Data Source in the Analysis tab of the Design Panel (example Commitment Item). Drag into the crosstab, hover and move around until you locate the red arrow vertical bar indicating where the rows will be inserted, and drop the field to add the drill-down.

**OR ALTERNATIVELY…**

- **Drag and drop into the Rows section in the Design Panel** – Click on the member / field listed under Data Source in the Analysis tab of the Design Panel (example Commitment Item). Drag and drop under the Rows section to add the drill-down.

Note: The **Context Menu** right click may also be used, for example, on the Commitment Item member under the Data Source to “Add to Rows” as yet another way to add the drill-down as well.
3. Review the results of adding the drill-down for the member / field down the rows regardless of method chosen.

*Note:* In this example, the Commitment Item has been added down the report and the amounts for each Duke Cost Object are broken out by the drill-down to the Commitment Item as well. Notice the Commitment Item field is now displayed under the Rows section of the Design Panel regardless of the method chosen.

4. Use the *Properties* view in the Design Panel to change the display of the newly added rows, such as from Key (number) and Text to just Key if desired (refer to *Analyzing and Formatting: Change Properties*… section of the guide as needed).

5. To remove a drill-down by row, drag and drop the column heading for the member / field out of the Rows section into the Data Source of the Design Panel (the drag and drop function CANNOT be used to drag a drill-down out of the crosstab back into the Design Panel).
Drag and Drop to Add Drill-Down (cont.)

Add or Remove Drill-Down in Columns Such as Adding Amounts by Posting Periods Across the Results

Note: In this example, the amount broken down by Posting Period is being added as data “across” the report in the columns of the Fund Trial Balance query results.

Note: As a reminder, workbooks must be refreshed after opening before options are available.

1. Ensure the Display Design Panel AND Property View are selected (refer to Using the Design Panel to Analyze and Format a Workbook for details).

Note: The Property View cannot be selected unless the Display Design Panel option is already selected to display in a workbook. The Property view will help as you add drill-down by rows or columns to quickly format those columns or rows as needed.
2. To add the drill-down across columns by using drag and drop, choose one of these two options:

- **Drag and drop directly into the crosstab results** - Click on the member / field listed under Data Source in the Analysis tab of the Design Panel (example Posting Period). Drag into the crosstab, hover and move around until you locate the red horizontal bar indicating where the columns will be inserted, and drop the field to add the drill-down.

OR ALTERNATIVELY…

- **Drag and drop into the Rows section in the Design Panel** – Click on the member / field listed under Data Source in the Analysis tab of the Design Panel (example Posting Period). Drag and drop under the Columns section to add the drill-down.

Note: The Context Menu right click may also be used, for example, on the Posting Period member under the Data Source to “Add to Columns” as yet another way to add the drill-down as well.
3. Review the results of adding the drill-down for the member / field across columns regardless of method chosen.

   Note: In this example, the amounts broken out by Posting Period for each Duke Cost Object have been added in columns across the report to add this drill-down by Posting Period. Notice the Posting Period field is now displayed under the Columns section of the Design Panel regardless of the method chosen.

4. Use the Properties view in the Design Panel to show totals if the drill-down for example removed the balances across periods by Duke Cost Object for all periods, etc. (refer to Analyzing and Formatting: Change Properties… section of the guide as needed).

5. To remove a drill-down by columns, simply use the Undo button on the Analysis toolbar at the top or drag and drop the member / field out of the Columns section back into the Data Source section of the Design Panel (the drag and drop function CANNOT be used to drag a drill-down out of the crosstab back into the Design Panel).