Drag and Drop to Swap the View of Results

Important Points about Swapping the View of the Results

- Swapping the entire view of query results allows you to analyze the data by changing how the data is displayed for a selected organization / BFR Code.

- As an example, query results like the Fund Trial Balance for a selected BFR Code may be originally displayed for amounts by Duke Cost Object to see who spent dollars. The entire view of the results may be “swapped” to a view of amounts by Commitment Item (G/L Account) to see what dollars were spent across the organization.

- The data that is included in the query results is not changed, just the view that is displayed.

- While there are different options to swap a view of the results, the drag and drop function in the Design Panel is the method covered in this section of the guide.
Swap the View of the Results Such as from Duke Cost Object to Commitment Item (G/L Account)

Note: In this example of the Fund Trial Balance, the original view of the results is by Duke Cost Object. The view will be swapped with a view of the same results by Commitment Item (G/L Account) with no Cost Objects displayed to show who spent the amounts.

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 swap the view to quickly format columns or rows as needed.
2. To swap the view of the results, for example from a Duke Cost Object view (first column) to a Commitment Item (G/L Account) view, choose one of the following 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 first column of the crosstab (example Duke Cost Object) until you locate the red outline of the column OR a green outline of the first column heading. Drop the field on top of a value in the column or directly on the heading to swap the view.

**OR ALTERNATIVELY…**

- **Drag and drop into the Columns 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 the field directly on top of the field listed under the Rows section (example Duke Cost Object) to overlay that field and swap the view of the results.
3. Review the results of swapping the view regardless of the method chosen.

   *Note:* In this example, the entire view of the data for an organization / BFR Code has swapped from a view by Duke Cost Object to a view by Commitment Item (G/L Account). The Cost Object column and description showing who spent the amounts are no longer visible in this view. Notice the Commitment Item field is the only one 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 any formatting or totals as needed (refer to *Analyzing and Formatting: Change Properties*... section of the guide).

   *Note:* Use the  
   *Undo* button in the Analysis toolbar at the top of the screen to swap the view back as needed.
Swap the View and Add Drilldown of the Results

Note: In this example of the Fund Trial Balance, the original view of the results is by Duke Cost Object. The view will be swapped with a view of the same results by Commitment Item (G/L Account) and add the drill-down by Cost Object to show who spent the amounts for each Commitment Item.

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 swap the view and add drill-down by rows or columns to quickly format those columns or rows as needed.
2. To swap the view of the results and add the drill-down, for example from a Duke Cost Object view (first column) to a Commitment Item (G/L Account) view and add the drill-down by Duke Cost Object, choose one of the following 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 the field to the left border of the first column of the crosstab (example Duke Cost Object) until you locate the red vertical line of the column OR a green outline of the first column heading. Drop the field on top of the red line of the column or directly on the heading to both swap the view and add a 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 the field directly above the field listed under the Columns section of the Design Panel to swap the view of the results.
3. Review the results of swapping the view regardless of the method chosen.

   **Note:** In this example, the entire view of the data for an organization / BFR Code has swapped from a view by Duke Cost Object to a view by Commitment Item (G/L Account). However, drill-down was added for the Duke Cost Object column and description showing who spent the amounts by each Commitment Item. Notice the Commitment Item field is displayed above the Duke Cost Object field under the Rows section of the Design Panel regardless of the method chosen.

4. Use the **Properties** view in the Design Panel to change any formatting or totals as needed (refer to **Analyzing and Formatting: Change Properties**… section of the guide).

   **Note:** Use the **Undo** button in the Analysis toolbar at the top of the screen to swap the view back as needed.