Expand, Remove, or Add Hierarchy (BFR) Levels

Important Points about Hierarchies inQueries

- Some queries containorganizational (BFR Code) levels of the Duke Hierarchy, while no hierarchy is active in other queries.
  - Queries designed with no active hierarchy will display in a flat presentation, for example by Duke Cost Object.
  - Queries designed with an active hierarchy may display with all levels fully open or with some levels partially opened and some closed (indicated with + and – signs).

- If the active hierarchy in a query is completely or partially closed, it can be easily expanded using the **Hierarchy** button located on the toolbar under the Analysis tab (the Context Menu right-click method is also available if preferred).
  - The Fund Trial Balance used in this guide demonstrates a query with an active hierarchy that is partially expanded.
  - Using the **Expand** button to manually open all levels of the hierarchy is time consuming and the **Hierarchy** button is the simplest way to fully expand the query.

- Hierarchies can be removed (deactivated) or added (activated) to switch the view between one with hierarchies displayed or a flat presentation using the **Design Panel** or the **Hierarchy** button on the Analysis tab toolbar.
  - Another way to add or remove the hierarchy is to use the **Context Menu right-click** function in the results.
  - In the Fund Trial Balance example, the **Design Panel** method removes the hierarchy and easily allows sorting by the Cost Object column for a straight-line numeric presentation.
  - In the Fund Trial Balance example, the **Hierarchy** button allows you to use **Show Levels** to remove the hierarchy and then the columns can be sorted using Excel options.

- In addition, some queries may contain other hierarchies, like Commitment Item (G/L Account) groups and similar functions to remove hierarchies are available.
Hierarchy Levels (cont.)

Expand the Hierarchy to See All Levels and Duke Cost Objects

Note: The Fund Trial Balance example used in this guide is done from the Duke Cost Object original view of the query results with no other analysis changes. These steps expand the hierarchy without having to manually open each level. The Context Menu right-click method is also available with similar steps if preferred. As a reminder, workbooks must be refreshed after opening before options are available.

1. Click into the first column heading (Duke Cost Object column heading in this example) to select that column for the action of expanding the hierarchy.

2. Click on the Drop-down for the Hierarchy button to see options.
3. Select the options from the resulting pop-up window per this path: Expand to Level → Level # (# = choose the highest level listed at bottom of the list in order to expand fully, such as Level 12 in this example).

   Note: If you have selected an active cell for an Organization / BFR Code lower within the hierarchy to expand, the menu option Expand Node to Level will be available and the levels displayed in the pop-out window will be adjusted to the level of the organization chosen, such as Levels 8 – 12 versus the Levels 1 – 12 shown in this example).

4. Review the results that now show the entire depth of the hierarchy now expanded (all Expand buttons now open).

   Note: If preferred, right click into the column heading and choose Expand to Level and select the highest level at the bottom of the list to fully expand the hierarchies in the query.
Hierarchy Levels (cont.)

Remove a Hierarchy (BFR) to Display a Flat Presentation by Cost Object Using the Design Panel and Sort Numerically

Note: The Fund Trial Balance example used in this guide is done from the Duke Cost Object view (original view) of the query. If a hierarchy is displayed in query results, the hierarchy may be deactivated to completely remove the hierarchy (BFR/Org. Unit levels). Once removed the function can be used again later to add back the hierarchy (turn on and off like a light switch). While there are other ways to remove the hierarchy, the Design Panel method allows underlying hierarchy to be removed which allows you to easily sort right in the query results by another column as well, such as the Cost Object column in this example.

1. Ensure the Display Design Panel is selected (refer to Using the Design Panel to Analyze and Format a Workbook for details).
2. Click in the **first column heading** (Duke Cost Object in this example) or an active cell within that first column.

3. In the Analysis tab of the Design Panel, **right click** once on the item listed under **Rows**, such as **Duke Cost Object All Nodes (No Conf)** in this Fund Trial Balance example (name varies by name of the hierarchy displayed in the embedded query).

4. In the resulting pop-up window, select the **Only Use Hierarchy All Nodes (No Conf) for Filter** option (name varies).

5. Review the results now displayed without a hierarchy as a flat presentation (still sorted by the first column like Duke Cost Object).
6. **Right click** on a column heading like **Cost Object** in this example, and click on the **Sort Ascending** or **Sort Descending** to easily sort the data in a straight-line numeric view.

**Note:** *Other methods may remove the hierarchy from view, but the underlying structure is still embedded* and so sorting by a column heading within the crosstab results may not work.

7. After sorting, review the results like in this example that displays the data in a straight-line numeric view by the Cost Object column.
Remove a Hierarchy (BFR) to Display a Flat Presentation by Cost Object Using the Hierarchy Button

Note: The Fund Trial Balance example used in this guide is done from the Duke Cost Object view (original view) of the query. If a hierarchy is displayed in query results, the hierarchy may be deactivated to completely remove the hierarchy (BFR/Org. Unit levels). Once removed the function can be used again later to add back the hierarchy (turn on and off like a light switch). While there are other ways to remove the hierarchy, the Hierarchy button method is a quick way to remove the hierarchy, but will not remove the underlying hierarchy structure. Use Excel functions to sort columns versus the Context right-click menu in the crosstab results.

1. Click into the first column heading (Duke Cost Object column heading in this example) to select that column for the action of expanding the hierarchy.

2. Under the Analysis tab, click on the Drop-down for the Hierarchy button and select the Show Levels... option.

Note: As a reminder, workbooks must be refreshed after opening before options are available.
3. In Show Levels box, click to UNCHECK the Select All checkbox which deselects all levels except the highest level displayed (12 in this example) at the bottom.

4. Click **OK** to effectively remove the hierarchy.

5. Review the results now displayed without a hierarchy as a flat presentation but still sorted by the first column Duke Cost Object

**Note:** Use the sorting options in Excel to sort the column. Using the **Context Menu right-click option to sort by column heading, for example Cost Object, will NOT work** as the underlying hierarchy is still in place.
Hierarchy Levels (cont.)

Activate a Hierarchy

Note: The Fund Trial Balance example used in this guide is done from the Duke Cost Object view (original view) of the query. If a hierarchy is deactivated to remove the BFR/Org. Unit levels for a flat presentation by Cost Objects, the function can be used again later to add back or activate the hierarchy (turn on and off like a light switch).

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

1. Ensure the Display Design Panel is selected (see Using the Design Panel to Analyze and Format a Workbook for details).

2. Click in the first column heading (Duke Cost Object in this example) or an active cell within that first column.
3. In the Analysis tab of the Design Panel, right click once on the item listed under Rows, such as Duke Cost Object in this Fund Trial Balance example (name varies by name of the hierarchy displayed in the embedded query).

4. In the resulting pop-up window, de-select the Only Use Hierarchy All Nodes (No Conf) for Filter option (name varies).

5. Review the results now displayed with a hierarchy and sorted by Cost Object in a straight-line numeric view.
Add a Hierarchy to an Embedded Query That Did Not Have a Hierarchy Originally

Note: The Fund Trial Balance example used in this guide originally contained amounts by Duke Cost Object with an organizational hierarchy. The view was swapped to one by Commitment Item (G/L Account) and the hierarchy to sum G/L Accounts was missing. These steps add the hierarchy to the workbook.

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

1. Ensure the Display Design Panel is selected (refer to Using the Design Panel to Analyze and Format a Workbook for details).
2. Click in the **first column heading** (Commitment Item) in this example or an active cell within that first column.

3. In the Analysis tab of the Design Panel, click on the **Expand** buttons to open the desired member (in this example Commitment Item) and then to open **Hierarchies**.

4. To add the Hierarchy with totals down the rows of the workbook by using drag and drop, choose one of these two options:
   
   - **Drag and drop directly into the crosstab results** - Click on the desired Hierarchy (example **Total Primary and Sec Revenue/Expenses**). Drag into the crosstab, hover and move around until you locate the red horizontal bar indicating where the column of 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 desired Hierarchy for the member (example **Total Primary and Sec Revenue/Expenses**). Drag and drop under the Rows section to add the drill-down.
5. Review the results now displayed with a hierarchy.

6. Use the **Hierarchy** button or other preferred methods to expand the hierarchy to the desired level as needed.