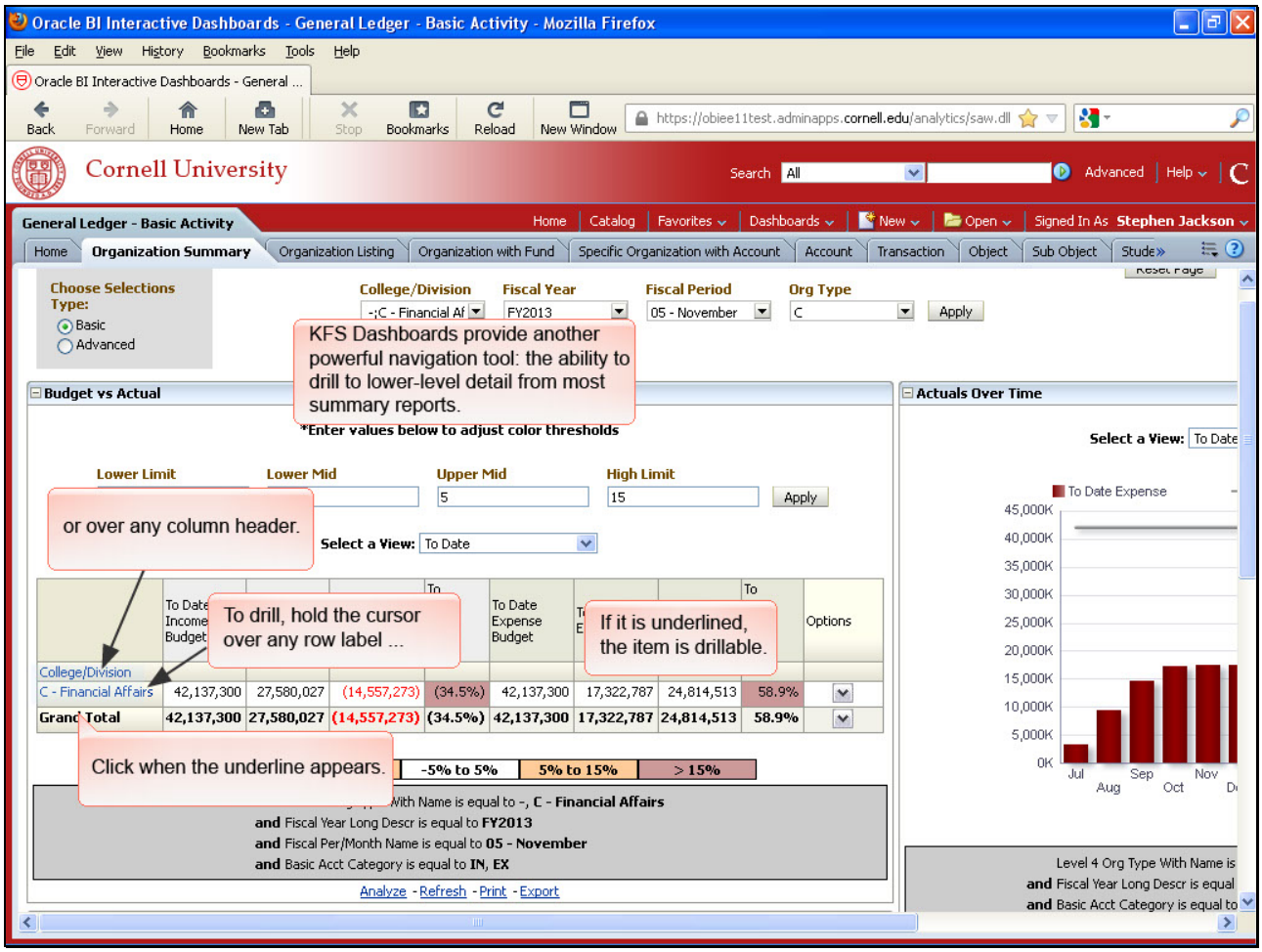
Chapter 7: Drilling to Detail from Summary Views



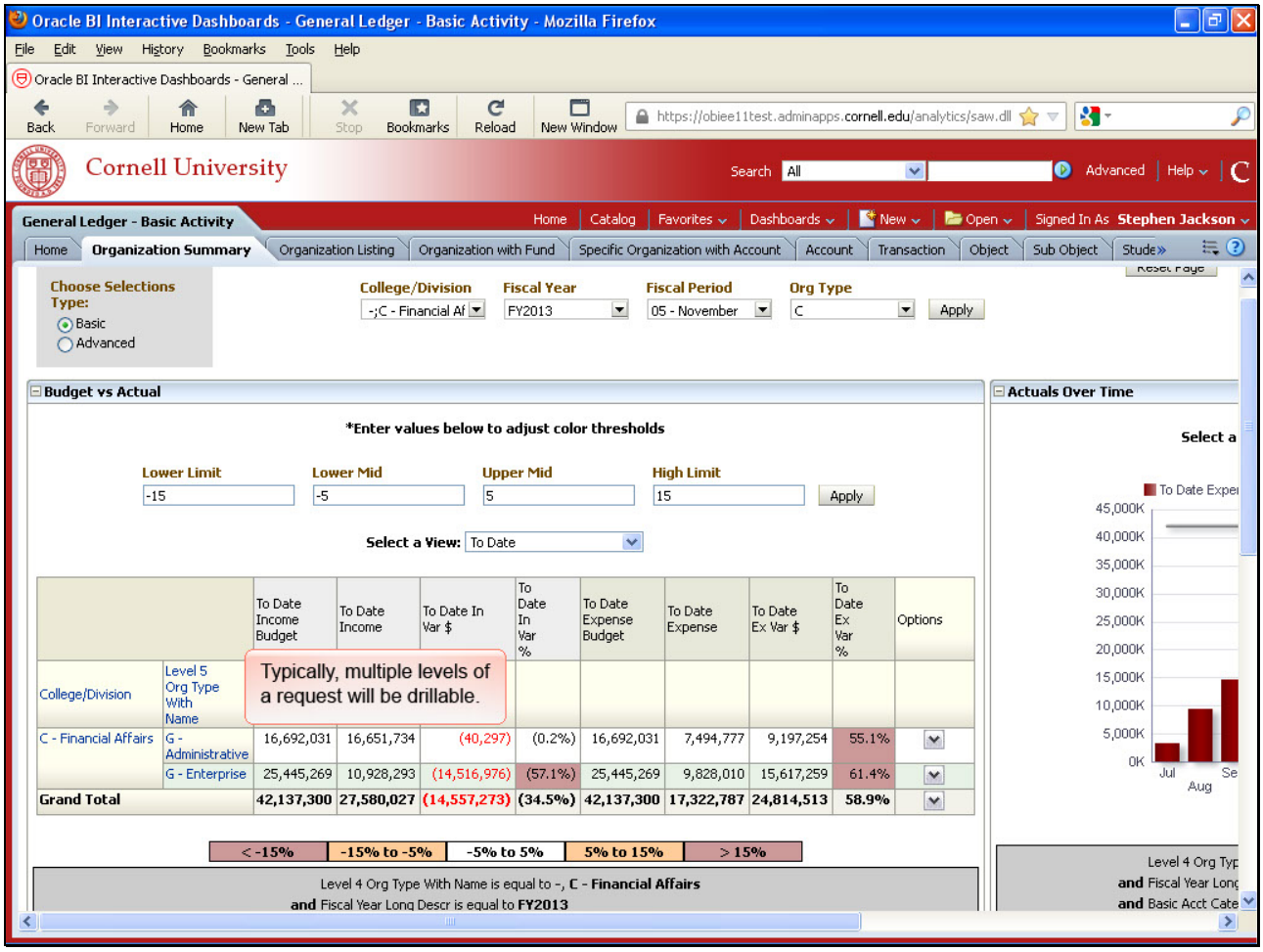
KFS Dashboards provide another powerful navigation tool: the ability to drill to lower-level detail from most summary reports.

To drill, hold the cursor over any row label,

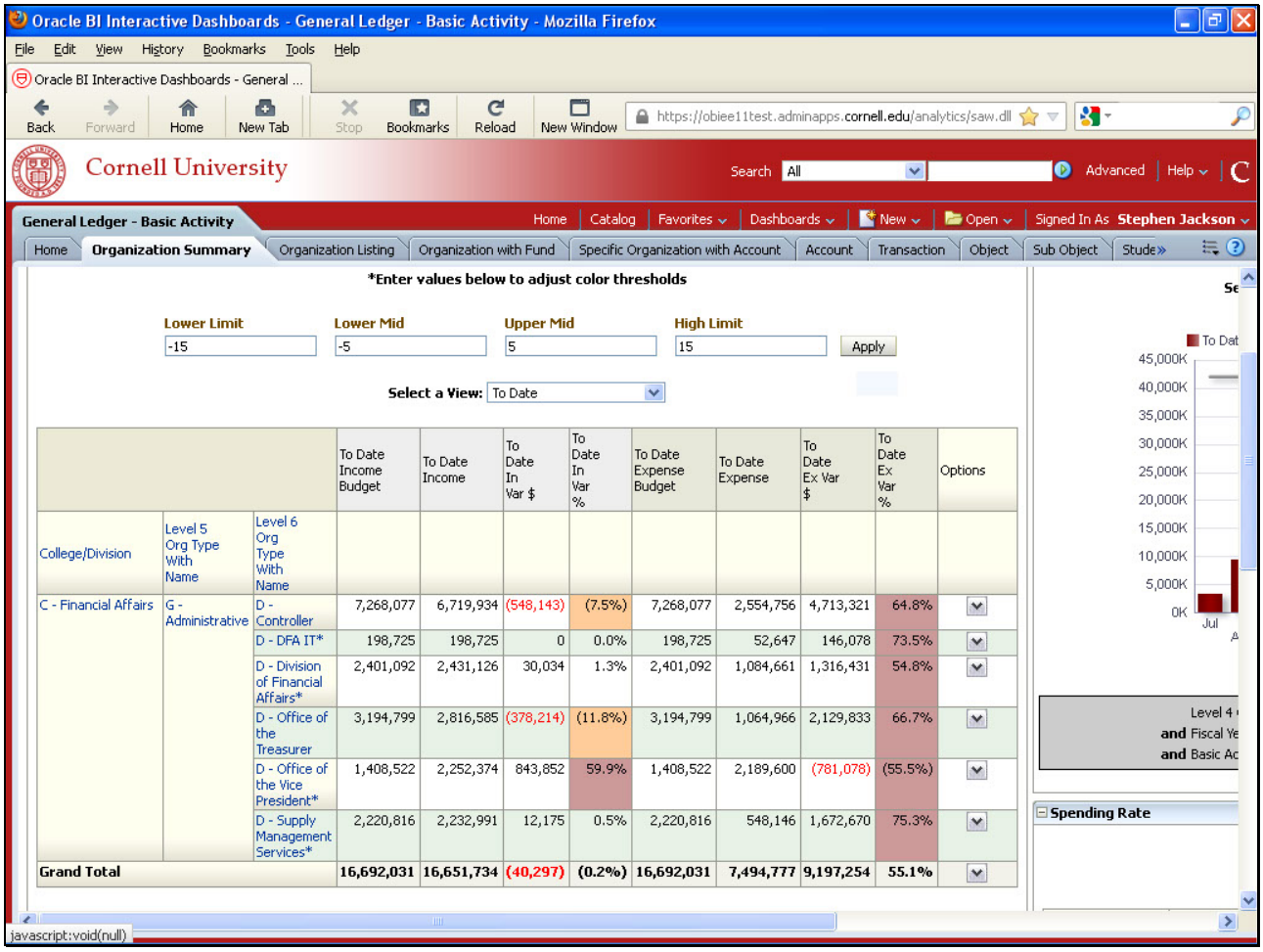
or over any column header.

If it is underlined, the item is drillable.

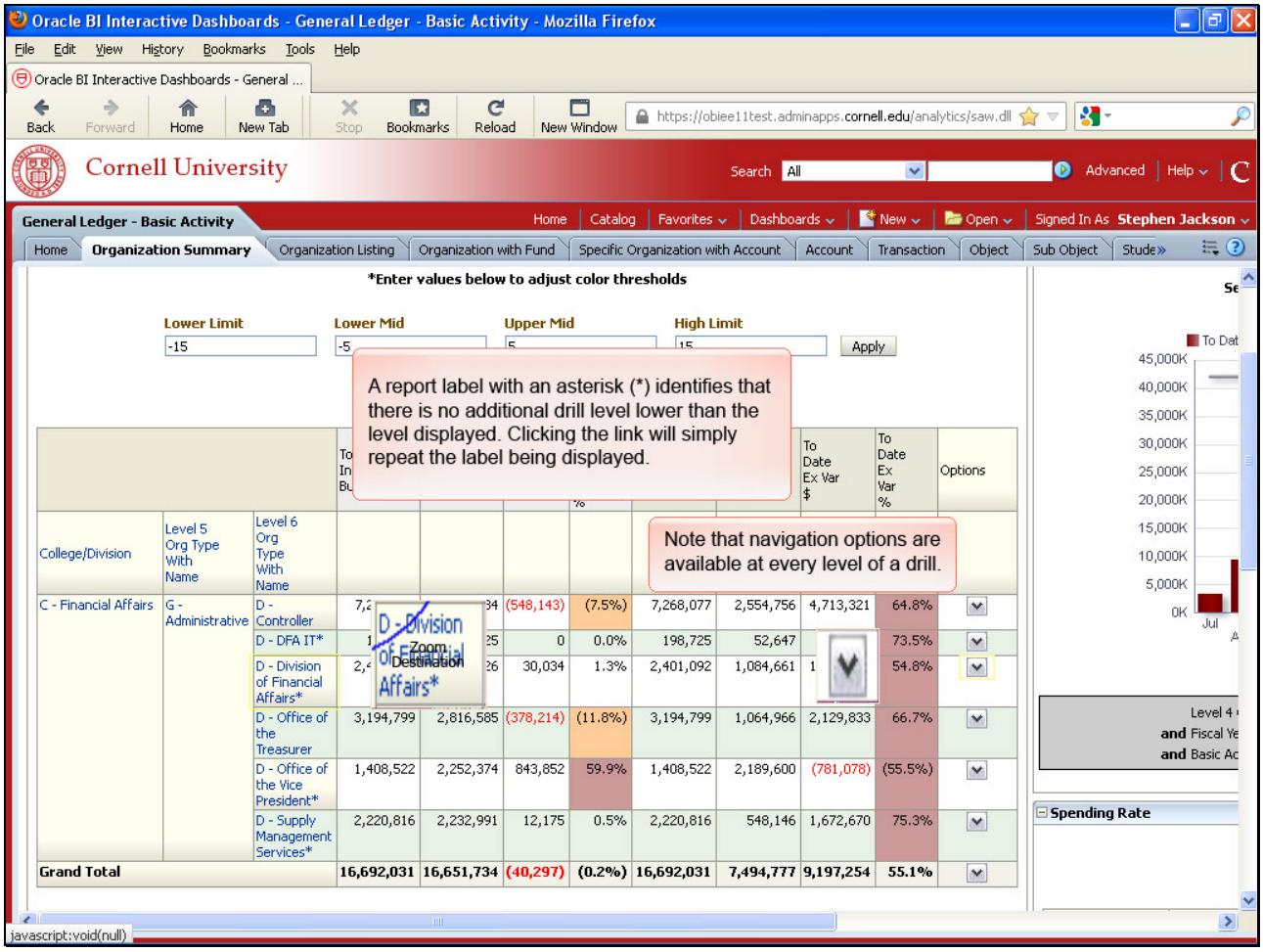
Click when the underline appears.



Typically, multiple levels of a request will be drillable.

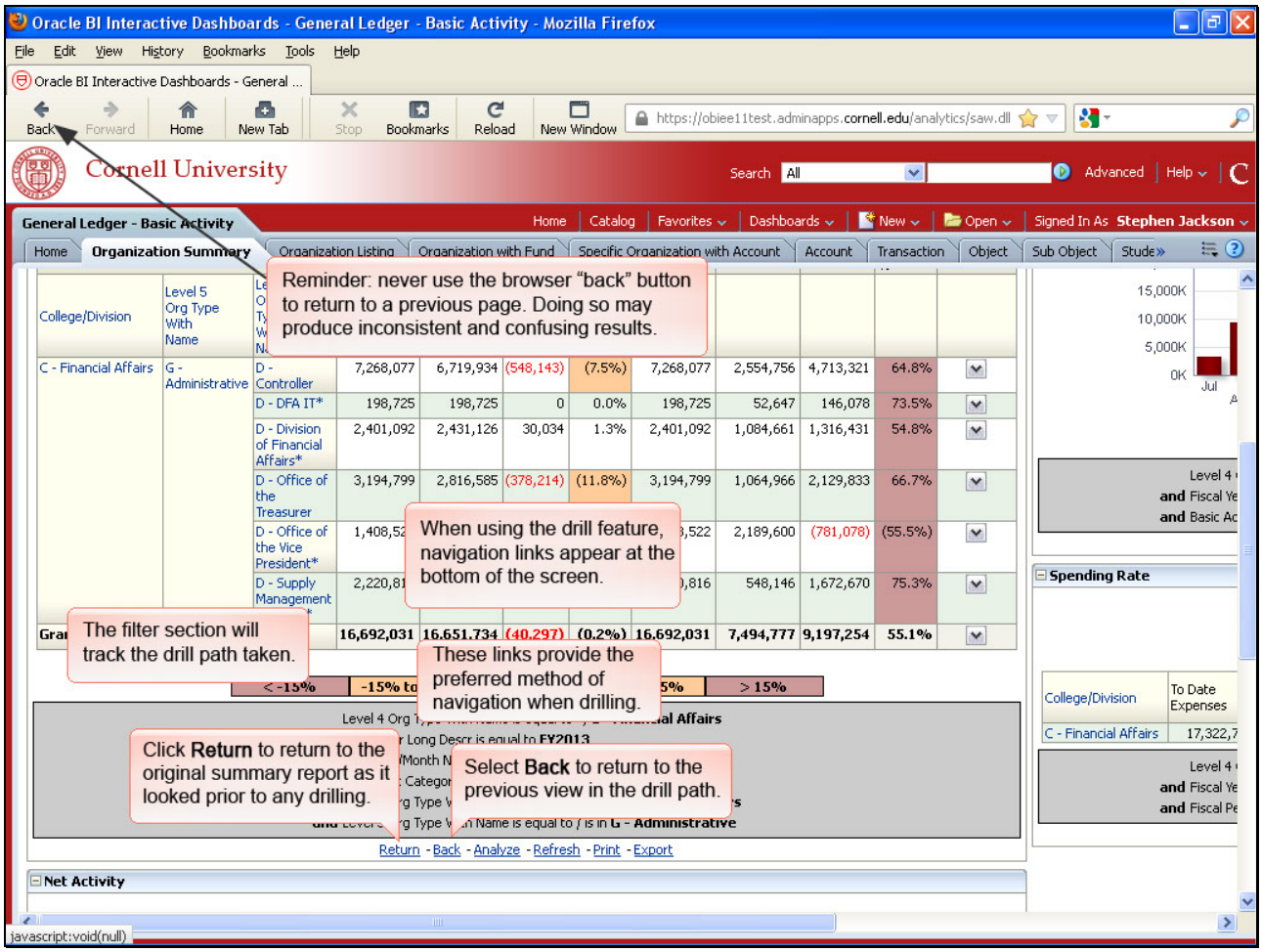


			To Date Income Budget	To Date Income	To Date In Var $	To Date In Var %	To Date Expense Budget	To Date Expense	To Date Ex Var $	To Date Ex Var %	Options
College/Division	Level 5 Org Type With Name	Level 6 Org Type With Name									
C - Financial Affairs	G - Administrative	D - Controller	7,268,077	6,719,934	(548,143)	(7.5%)	7,268,077	2,554,756	4,713,321	64.8%	
		D - DFA IT*	198,725	198,725	0	0.0%	198,725	52,647	146,078	73.5%	
		D - Division of Financial Affairs*	2,401,092	2,431,126	30,034	1.3%	2,401,092	1,084,661	1,316,431	54.8%	
		D - Office of the Treasurer	3,194,799	2,816,585	(378,214)	(11.8%)	3,194,799	1,064,966	2,129,833	66.7%	
		D - Office of the Vice President*	1,408,522	2,252,374	843,852	59.9%	1,408,522	2,189,600	(781,078)	(55.5%)	
		D - Supply Management Services*	2,220,816	2,232,991	12,175	0.5%	2,220,816	548,146	1,672,670	75.3%	
Grand Total			**16,692,031**	**16,651,734**	**(40,297)**	**(0.2%)**	**16,692,031**	**7,494,777**	**9,197,254**	**55.1%**	



A report label with an asterisk (*) identifies that there is no additional drill level lower than the level displayed. Clicking the link will simply repeat the label being displayed.

Note that navigation options are available at every level of a drill.



When using the drill feature, navigation links appear at the bottom of the screen.

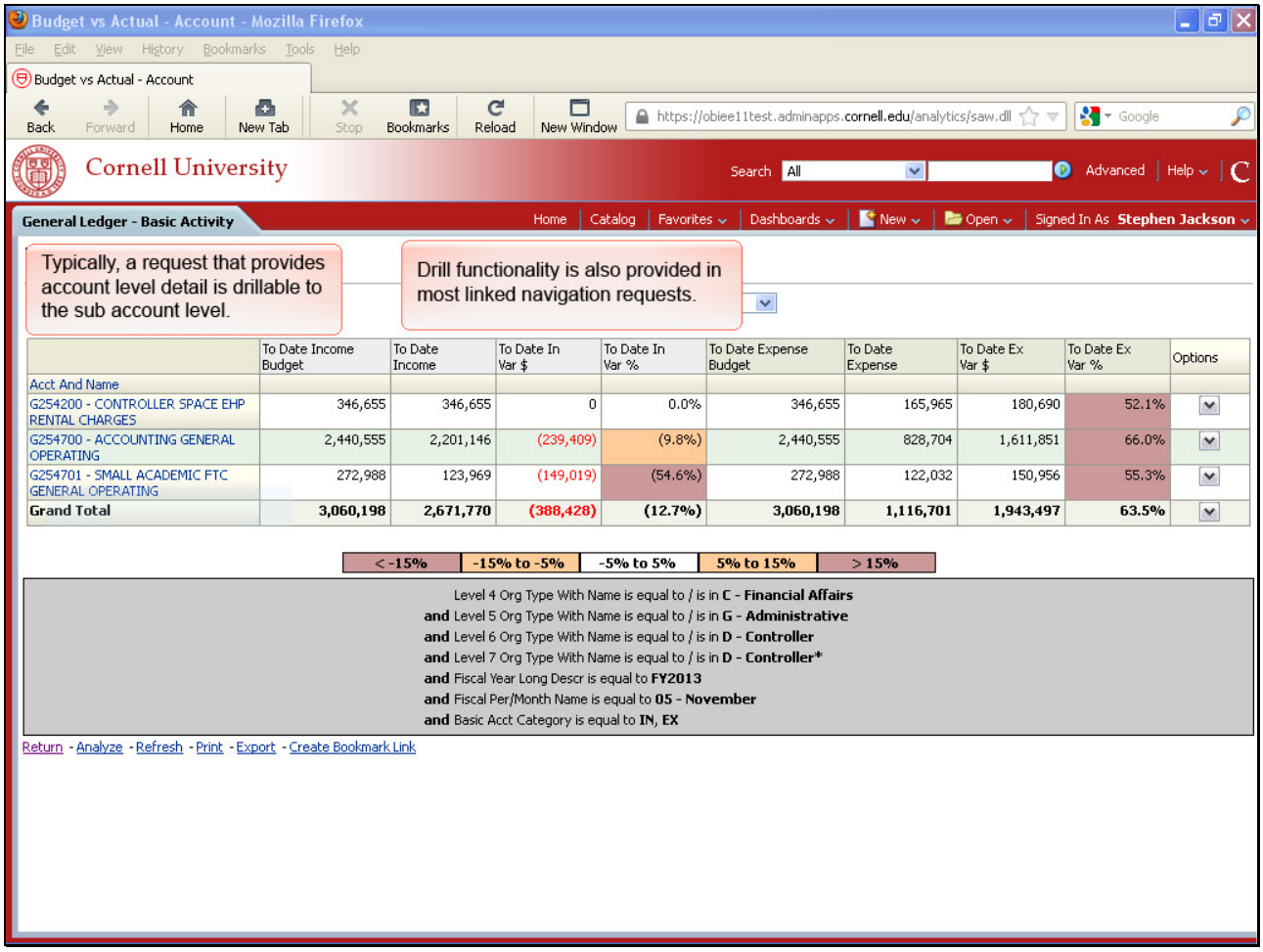
These links provide the preferred method of navigation when drilling.

The filter section will track the drill path taken.

Reminder: never use the browser "back" button to return to a previous page. Doing so may produce inconsistent and confusing results.

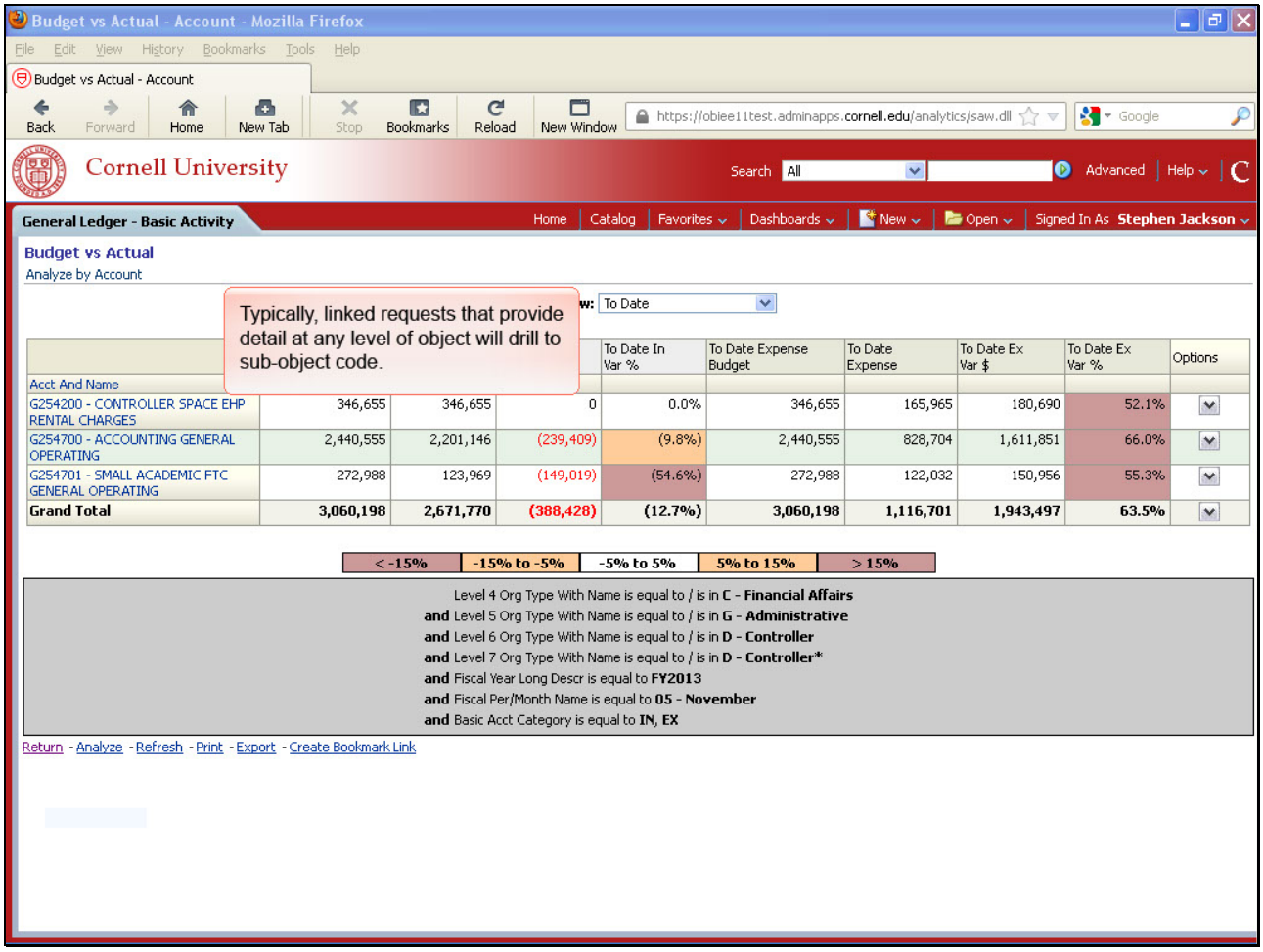
Select **Back** to return to the previous view in the drill path.

Click **Return** to return to the original summary report as it looked prior to any drilling.

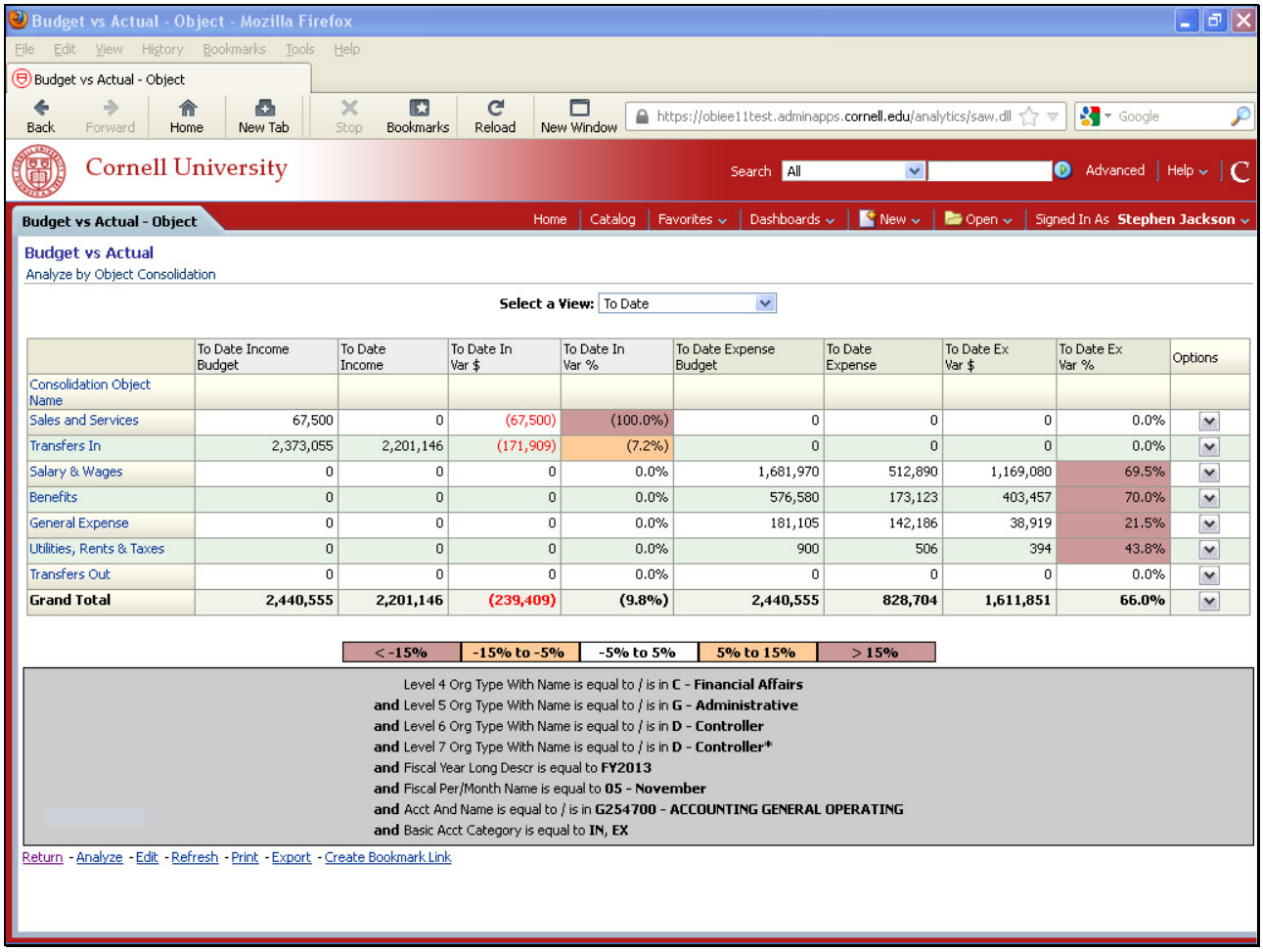


Drill functionality is also provided in most linked navigation requests.

Typically, a request that provides account level detail is drillable to the sub account level.



Typically, linked requests that provide detail at any level of object will drill to sub-object code.



Consolidation Object Name	To Date Income Budget	To Date Income	To Date In Var $	To Date In Var %	To Date Expense Budget	To Date Expense	To Date Ex Var $	To Date Ex Var %	Options
Sales and Services	67,500	0	(67,500)	(100.0%)	0	0	0	0.0%	
Transfers In	2,373,055	2,201,146	(171,909)	(7.2%)	0	0	0	0.0%	
Salary & Wages	0	0	0	0.0%	1,681,970	512,890	1,169,080	69.5%	
Benefits	0	0	0	0.0%	576,580	173,123	403,457	70.0%	
General Expense	0	0	0	0.0%	181,105	142,186	38,919	21.5%	
Utilities, Rents & Taxes	0	0	0	0.0%	900	506	394	43.8%	
Transfers Out	0	0	0	0.0%	0	0	0	0.0%	
Grand Total	**2,440,555**	**2,201,146**	**(239,409)**	**(9.8%)**	**2,440,555**	**828,704**	**1,611,851**	**66.0%**	

< -15%	-15% to -5%	-5% to 5%	5% to 15%	> 15%

Level 4 Org Type With Name is equal to / is in **C - Financial Affairs**
and Level 5 Org Type With Name is equal to / is in **G - Administrative**
and Level 6 Org Type With Name is equal to / is in **D - Controller**
and Level 7 Org Type With Name is equal to / is in **D - Controller***
and Fiscal Year Long Descr is equal to **FY2013**
and Fiscal Per/Month Name is equal to **05 - November**
and Acct And Name is equal to / is in **G254700 - ACCOUNTING GENERAL OPERATING**
and Basic Acct Category is equal to **IN, EX**

Return - Analyze - Edit - Refresh - Print - Export - Create Bookmark Link