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.
<table>
<thead>
<tr>
<th>College/Division</th>
<th>Level 5 Org Title with Name</th>
<th>Level 6 Org Type with Name</th>
<th>Collected</th>
<th>To Date Income Budget</th>
<th>To Date Income</th>
<th>To Date Inc. Var $</th>
<th>To Date Inc. Var %</th>
<th>To Date Expense Budget</th>
<th>To Date Expense</th>
<th>To Date Exp. Var $</th>
<th>To Date Exp. Var %</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>C - Financial Affairs</td>
<td>Administrative</td>
<td></td>
<td>7,250,077</td>
<td>6,719,104</td>
<td>548,143</td>
<td>(7.55%)</td>
<td>7,250,077</td>
<td>2,254,756</td>
<td>4,713,321</td>
<td>64.92%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Division of Administration</td>
<td></td>
<td>190,725</td>
<td>190,725</td>
<td>0</td>
<td>0.0%</td>
<td>190,725</td>
<td>58,847</td>
<td>54,407</td>
<td>72.52%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Division of Financial Affairs</td>
<td></td>
<td>2,408,062</td>
<td>2,401,126</td>
<td>30,936</td>
<td>1.5%</td>
<td>2,401,092</td>
<td>1,194,664</td>
<td>1,196,431</td>
<td>54.93%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Office of the Treasurer</td>
<td></td>
<td>3,199,799</td>
<td>2,876,925</td>
<td>372,874</td>
<td>(13.07%)</td>
<td>3,199,799</td>
<td>1,866,956</td>
<td>2,123,832</td>
<td>66.7%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Office of the Vice President</td>
<td></td>
<td>1,460,522</td>
<td>2,352,974</td>
<td>843,052</td>
<td>59.5%</td>
<td>1,408,022</td>
<td>2,188,430</td>
<td>(781,470)</td>
<td>(65.5%)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Supply Management Services</td>
<td></td>
<td>2,220,616</td>
<td>2,222,993</td>
<td>12,377</td>
<td>0.5%</td>
<td>2,220,616</td>
<td>548,146</td>
<td>1,672,670</td>
<td>75.2%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Grand Total: 18,692,081 | 16,651,734 | (40,297) (0.2%) | 16,692,081 | 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.
### Budget vs Actual

**Analysis by: Object: Consolidation**

<table>
<thead>
<tr>
<th>Consolidation</th>
<th>Object Name</th>
<th>To Date Income</th>
<th>To Date Income Variance</th>
<th>To Date Income Var %</th>
<th>To Date Expense</th>
<th>To Date Expense Variance</th>
<th>To Date Expense Var %</th>
<th>To Date Ex var %</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales and Services</td>
<td>67,500</td>
<td>0</td>
<td>(67,500)</td>
<td>(100.0%)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td>Transfers In</td>
<td>2,373,888</td>
<td>2,291,146</td>
<td>(71,764)</td>
<td>(3.0%)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td>Salary &amp; Wages</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td>1,682,970</td>
<td>512,099</td>
<td>1,269,800</td>
<td>81.5%</td>
<td></td>
</tr>
<tr>
<td>Benefits</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td>578,500</td>
<td>173,223</td>
<td>403,277</td>
<td>70.0%</td>
<td></td>
</tr>
<tr>
<td>General Expense</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td>181,510</td>
<td>142,664</td>
<td>38,846</td>
<td>21.5%</td>
<td></td>
</tr>
<tr>
<td>Utilities, Rent &amp; Taxes</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td>900</td>
<td>964</td>
<td>64</td>
<td>43.8%</td>
<td></td>
</tr>
<tr>
<td>Transfers Out</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0%</td>
<td></td>
</tr>
<tr>
<td>Grand Total</td>
<td>2,440,555</td>
<td>2,281,146</td>
<td>(139,409)</td>
<td>(5.8%)</td>
<td>2,440,555</td>
<td>629,704</td>
<td>1,691,851</td>
<td>66.0%</td>
<td></td>
</tr>
</tbody>
</table>

### Level 4 Org Type With Name is equal to (in C: Financial Affairs
and Level 5 Org Type With Name is equal to (in G: Administrative
and Level 6 Org Type With Name is equal to (in D: Controller
and Level 7 Org Type With Name is equal to (in F: Controller
and Fiscal Year End Date is equal to FY2013
and Fiscal Per/Month Name is equal to 05 - November
and Accnt And Name is equal to 710 in 6254700 - ACCOUNTING GENERAL OPERATING
and Fiscal Period Category is equal to IF, FK

**Page 8 of 8**