

### Chapter 7: Drilling to Detail from Summary Views

The screenshot shows the Oracle BI Interactive Dashboards interface for Cornell University. The main report is titled "Budget vs Actual" and displays a table of financial data. Annotations are placed over the interface to explain drilling capabilities:

- A callout box at the top states: "KFS Dashboards provide another powerful navigation tool: the ability to drill to lower-level detail from most summary reports."
- Below the table, a callout says: "or over any column header." with an arrow pointing to the "To Date Income Budget" header.
- Another callout says: "To drill, hold the cursor over any row label ..." with an arrow pointing to the "College/Division" row label.
- A third callout says: "If it is underlined, the item is drillable." with an arrow pointing to the underlined "College/Division" header.
- A fourth callout says: "Click when the underline appears." with an arrow pointing to the underlined "C - Financial Affairs" row.

The table data is as follows:

College/Division	To Date Income Budget	To Date Expense Budget	To Date Income Budget	To Date Expense Budget	To Date Income Budget	To Date Expense Budget	To Date Income Budget	To Date Expense Budget	To Date Income Budget	To Date Expense Budget	To Date Income Budget	To Date Expense Budget	To Date Income Budget	To Date Expense Budget	To Date Income Budget	To Date Expense Budget	To Date Income Budget	To Date Expense Budget
C - Financial Affairs	42,137,300	27,580,027	(14,557,273)	(34.5%)	42,137,300	17,322,787	24,814,513	58.9%										
<b>Grand Total</b>	<b>42,137,300</b>	<b>27,580,027</b>	<b>(14,557,273)</b>	<b>(34.5%)</b>	<b>42,137,300</b>	<b>17,322,787</b>	<b>24,814,513</b>	<b>58.9%</b>										

Annotations also include a "Choose Selections" panel with "Basic" selected, and a "Budget vs Actual" section with "Lower Limit", "Lower Mid", "Upper Mid", and "High Limit" input fields. A "Select a View" dropdown is set to "To Date".

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.

**Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox**

Oracle BI Interactive Dashboards - General ...

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**Choose Selections**  
Type:  
 Basic  
 Advanced

College/Division: C - Financial Af Fiscal Year: FY2013 Fiscal Period: 05 - November Org Type: C Apply

**Budget vs Actual**

\*Enter values below to adjust color thresholds

Lower Limit: -15 Lower Mid: -5 Upper Mid: 5 High Limit: 15 Apply

Select a View: To Date

		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									
C - Financial Affairs	G - Administrative	16,692,031	16,651,734	(40,297)	(0.2%)	16,692,031	7,494,777	9,197,254	55.1%	▼
	G - Enterprise	25,445,269	10,928,293	(14,516,976)	(57.1%)	25,445,269	9,828,010	15,617,259	61.4%	▼
<b>Grand Total</b>		<b>42,137,300</b>	<b>27,580,027</b>	<b>(14,557,273)</b>	<b>(34.5%)</b>	<b>42,137,300</b>	<b>17,322,787</b>	<b>24,814,513</b>	<b>58.9%</b>	▼

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

Level 4 Org Type With Name is equal to C - Financial Affairs and Fiscal Year Long Descr is equal to FY2013

**Actuals Over Time**

Select a

Level 4 Org Type and Fiscal Year Long and Basic Acct Cate

Typically, multiple levels of a request will be drillable.

Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox

Oracle BI Interactive Dashboards - General ...

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Home Organization Summary Organization Listing Organization with Fund Specific Organization with Account Account Transaction Object Sub Object Stude

\*Enter values below to adjust color thresholds

Lower Limit: -15 Lower Mid: -5 Upper Mid: 5 High Limit: 15 Apply

Select a View: To Date

			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%	
<b>Grand Total</b>			<b>16,692,031</b>	<b>16,651,734</b>	<b>(40,297)</b>	<b>(0.2%)</b>	<b>16,692,031</b>	<b>7,494,777</b>	<b>9,197,254</b>	<b>55.1%</b>	

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Spending Rate

javascript:void(null)

**\*Enter values below to adjust color thresholds**

Lower Limit	Lower Mid	Upper Mid	High Limit
-15	-5	5	15

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.

College/Division	Level 5 Org Type With Name	Level 6 Org Type With Name	To In BU	To Date Ex Var \$	To Date Ex Var %	Options
C - Financial Affairs	G - Administrative	D - Controller	7,234	(548,143)	(7.5%)	7,268,077
		D - DFA IT*	1	0	0.0%	198,725
		D - Division of Financial Affairs*	2,236	30,034	1.3%	2,401,092
		D - Office of the Treasurer	3,194,799	2,816,585	(378,214) (11.8%)	3,194,799
		D - Office of the Vice President*	1,408,522	2,252,374	843,852 59.9%	1,408,522
		D - Supply Management Services*	2,220,816	2,232,991	12,175 0.5%	2,220,816
<b>Grand Total</b>			<b>16,692,031</b>	<b>16,651,734</b>	<b>(40,297) (0.2%)</b>	<b>16,692,031</b>

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

Spending Rate

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.

The screenshot shows the Oracle BI Interactive Dashboards interface for Cornell University. The main content is a table titled "General Ledger - Basic Activity" with columns for various financial metrics. Several callout boxes are overlaid on the interface:

- Reminder:** never use the browser "back" button to return to a previous page. Doing so may produce inconsistent and confusing results.
- When using the drill feature,** navigation links appear at the bottom of the screen.
- These links provide the preferred method of navigation when drilling.**
- Click Return** to return to the original summary report as it looked prior to any drilling.
- Select Back** to return to the previous view in the drill path.
- The filter section will track the drill path taken.**

At the bottom of the screen, navigation links are visible: [Return](#) - [Back](#) - [Analyze](#) - [Refresh](#) - [Print](#) - [Export](#)

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.

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

Drill functionality is also provided in most linked navigation requests.

Acct And 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
G254200 - CONTROLLER SPACE EHP RENTAL CHARGES	346,655	346,655	0	0.0%	346,655	165,965	180,690	52.1%	▼
G254700 - ACCOUNTING GENERAL OPERATING	2,440,555	2,201,146	(239,409)	(9.8%)	2,440,555	828,704	1,611,851	66.0%	▼
G254701 - SMALL ACADEMIC FTC GENERAL OPERATING	272,988	123,969	(149,019)	(54.6%)	272,988	122,032	150,956	55.3%	▼
<b>Grand Total</b>	<b>3,060,198</b>	<b>2,671,770</b>	<b>(388,428)</b>	<b>(12.7%)</b>	<b>3,060,198</b>	<b>1,116,701</b>	<b>1,943,497</b>	<b>63.5%</b>	▼

< -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 Basic Acct Category is equal to **IN, EX**

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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.

**Budget vs Actual**  
Analyze by Account

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

Acct And Name	To Date In Var %	To Date Expense Budget	To Date Expense	To Date Ex Var \$	To Date Ex Var %	Options			
G254200 - CONTROLLER SPACE EHP RENTAL CHARGES	346,655	346,655	0	0.0%	346,655	165,965	180,690	52.1%	
G254700 - ACCOUNTING GENERAL OPERATING	2,440,555	2,201,146	(239,409)	(9.8%)	2,440,555	828,704	1,611,851	66.0%	
G254701 - SMALL ACADEMIC FTC GENERAL OPERATING	272,988	123,969	(149,019)	(54.6%)	272,988	122,032	150,956	55.3%	
<b>Grand Total</b>	<b>3,060,198</b>	<b>2,671,770</b>	<b>(388,428)</b>	<b>(12.7%)</b>	<b>3,060,198</b>	<b>1,116,701</b>	<b>1,943,497</b>	<b>63.5%</b>	

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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 Basic Acct Category is equal to **IN, EX**

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

Budget vs Actual - Object - Mozilla Firefox

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**Budget vs Actual**  
Analyze by Object Consolidation

Select a View: To Date

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%	
<b>Grand Total</b>	<b>2,440,555</b>	<b>2,201,146</b>	<b>(239,409)</b>	<b>(9.8%)</b>	<b>2,440,555</b>	<b>828,704</b>	<b>1,611,851</b>	<b>66.0%</b>	

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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**

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