

How to Drill Down on Setup Panel

A user can set up panel to be drilled down once shown in the dashboard. The following steps can be a guide how to do so:

1. Create two panels, one is the **main panel (Master)** that will be displayed on the dashboard and the other one is the panel to be **drilled down (Subpanel)**. Take note that the panels that can only be selected from Drill Down field are panels whose Class is **Subpanel**.

Grid

The screenshot shows the configuration for two grid panels. The 'Customers' panel is the main panel (Master) and the 'Customer Invoices' panel is the subpanel. Both panels have a 'Drill Down' field set to 'Customer Invoices'. A red arrow points from the 'Drill Down' field of the 'Customers' panel to the 'Drill Down' field of the 'Customer Invoices' panel.

Column Name	Caption	Width	Align	Footer	Format	Drill Down Column
srCustomerID		75	Left			srCustomerID
srCompanyName		75	Left			
srName		75	Left			
srCity		75	Left			

Column Name	Caption	Width	Align	Footer	Format	Drill Down Column
srCustomerID		75	Left			srCustomerID
srCompanyName		75	Left			
srOrderNumber		75	Left	Count		
dbOrderTotal		75	Left	Sum	#####.00	
dbAmountDue		75	Left	Sum	#####.00	
yrPaid		75	Left	Yes/No		

Chart

The screenshot shows the configuration for two chart panels. The 'Invoices Chart' panel is the main panel (Master) and the 'Invoices Drill Down' panel is the subpanel. Both panels have a 'Drill Down' field set to 'Invoices Drill Down'. A red arrow points from the 'Drill Down' field of the 'Invoices Chart' panel to the 'Drill Down' field of the 'Invoices Drill Down' panel.

Column Name	Title / Legend	Display Title	Format
srCustomerID		General	
OrderTotal		✓	Currency

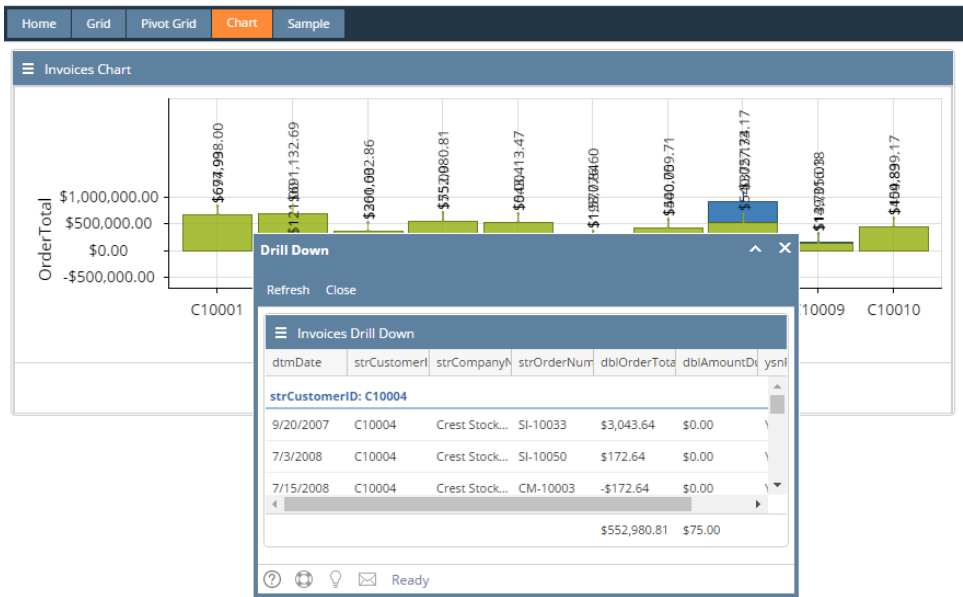
Column Name	Caption	Width	Align	Footer	Format	Drill Down Column	Drill Down Screen Name
srCustomerID		75	Left				
srCompanyName		75	Left				
srOrderNumber		75	Left				
dbOrderTotal		75	Left	Sum	\$#,###.00		
dbAmountDue		75	Left	Sum	\$#,###.00		
yrPaid		75	Left	Yes/No			

2. Make sure that the second panel is selected on the **Drill Down** field and the same field is selected on the **Drill Down Column** field of the first panel like what is shown in the above screenshot.
 3. Once the first panel is placed on the dashboard, double click on the grid record to drill down the second panel.
- Grid**

Customers			
strCustomerID	strCompanyName	strName	strCity
C10001	Home Dealers	Sarah Lopez	Stonham
C10002	Furniture Place	Kimberly Hill	Cambridge
C10003	B&M Designs		Lakeville
C10004	Crest Stockroom		New York
C10005	Major Bed & Bath		New York
C10006	Annie's Discou		Los Angeles
C10007	L&K Home Coll		Ocala
C10008	CAM Furniture		La Puente
C10009	Kyle Home App		Auburn
C10010	Master Amolier		Snalandon Hewsh...

Customer Invoices						
dtmDate	strCust...	strCom...	strOrder...	dbiOrder...	dbiAmo...	ysnPai...
02/05/2...	C10001	Home D...	SI-10015	\$3,452.73	\$0.00	Yes
03/02/2...	C10001	Home D...	SI-10086	\$63,423...	\$0.00	Yes
11/05/2...	C10001	Home D...	SI-10111	\$6,517.99	\$0.00	Yes
12/05/2...	C10001	Home D...	SI-10116	\$40,727...	\$0.00	Yes
01/01/2...	C10001	Home D...	SI-10082	\$1,025.46	\$0.00	Yes
01/02/2...	C10001	Home D...	SI-10121	\$34,598...	\$0.00	Yes
01/04/2...	C10001	Home D...	SI-10118	\$56,759...	\$0.00	Yes
01/13/2...	C10001	Home D...	SI-10072	\$2,165.89	\$0.00	Yes
03/01/2...	C10001	Home D...	SI-10133	\$1,780.85	\$0.00	Yes
12/09/2...	C10001	Home D...	SI-10199	\$77,655...	\$0.00	Yes
01/05/2...	C10001	Home D...	SI-10219	\$394.62...	\$0.00	Yes
04/20/2...	C10001	Home D...	SI-10206	\$451.64...	\$0.00	Yes
04/20/2...	C10001	Home D...	CPRE-10...	-\$460.0...	\$0.00	Yes
04/20/2...	C10001	Home D...	SI-10207	\$100.00	\$100.00	No
05/06/2...	C10001	Home D...	SI-10232	\$100.00	\$100.00	No
05/15/2...	C10001	Home D...	SI-10245	\$9.99	\$9.99	No
05/20/2...	C10001	Home D...	SI-10246	\$77.95	\$77.95	No
08/28/2...	C10001	Home D...	SI-10247	\$100.00	\$100.00	No
09/06/2...	C10001	Home D...	SI-10248	\$9.99	\$9.99	No
09/28/2...	C10001	Home D...	SI-10249	\$100.00	\$100.00	No
			23	\$674.99...	\$697.93	

Chart



⚠ Date Condition set on the parent panel (*Customers*) will be inherited by the child/drilled down panel (*Customer Invoices*).