

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 two side-by-side panel configuration windows. The left window is for a panel named 'Customers' and the right is for 'Customer Invoices'. Both panels are configured as grids. In the 'Customers' panel, the 'Class' is set to 'Master' and the 'Drill Down' field is set to 'Customer Invoices'. In the 'Customer Invoices' panel, the 'Class' is set to 'Subpanel' and the 'Drill Down' field is also set to 'Customer Invoices'. A red arrow points from the 'Drill Down' dropdown in the 'Customers' panel to the 'Drill Down' dropdown in the 'Customer Invoices' panel, indicating the relationship between the two panels.

Chart

The screenshot shows two side-by-side panel configuration windows. The left window is for a panel named 'Invoices Chart' and the right is for 'Invoices Drill Down'. Both panels are configured as charts. In the 'Invoices Chart' panel, the 'Class' is set to 'Master' and the 'Drill Down' field is set to 'Invoices Drill Down'. In the 'Invoices Drill Down' panel, the 'Class' is set to 'Subpanel' and the 'Drill Down' field is also set to 'Invoices Drill Down'. A red arrow points from the 'Drill Down' dropdown in the 'Invoices Chart' panel to the 'Drill Down' dropdown in the 'Invoices Drill Down' panel, indicating the relationship between the two panels.

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**

Home

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 Appliances		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		Snaland Hwstn...

Drill Down

Customer Invoices

dtmDate	strCust...	strCom...	strOrder...	dblOrder...	dblAmo...	ysnPaid
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

HomeGridPivot GridChartSample

Invoices Chart

Drill Down

Invoices Drill Down

dtmDate	strCustomerID	strCompanyName	strOrderNum	dblOrderTotal	dblAmountDe	ysnPaid
strCustomerID: C10004						
9/20/2007	C10004	Crest Stock...	SI-10033	\$3,043.64	\$0.00	
7/3/2008	C10004	Crest Stock...	SI-10050	\$172.64	\$0.00	
7/15/2008	C10004	Crest Stock...	CM-10003	-\$172.64	\$0.00	
				\$552,980.81	\$75.00	

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