



The Drill on Drilling in Quantum Analytics

Focus on Award Detail and Budget to Actuals reports

- ❖ You can “drill” on labels and on numeric values
- ❖ Drilling on labels *adds a column* to your report
- ❖ Drilling on numeric values *opens a new browser tab*
- ❖ After you drill on labels you can save the “structure” of that report so that every time you run it, the columns you want to view open with the report (you don’t have to drill)
- ❖ You can “drill” on a column header label, such as “Object Level C” **or** a row label, such as “C300~Operating Expenses” by clicking them (if they are blue hyperlinks)
- ❖ If a column or row label is NOT a blue hyperlink, you can use a right click technique to drill

Examples:

In Award Detail reports (Sponsored Management Dashboard), right clicking on the column label “Object Level C” allows you to “include” the column for “Object”:

Before						After							
Object Level B	Cost Structure	Object Level C	Period Activity Amount	Budget	LTD Costs	Object Level B	Cost Structure	Object Level C	Object	Period Activity Amount	Budget	LTD Costs	
B100-Direct Costs	MTDC	C100-Salaries	\$6,215.06	\$436,389.00	\$264,947.15	B100-Direct Costs	MTDC	C100-Salaries	1012-Faculty 12 Month	\$3,961.24	\$0.00	\$132,515.64	
		C200-Fringe Benefits	\$1,357.95	\$132,462.00	\$58,234.97				1021-Post Doc/Fellows	\$3,153.82	\$0.00	\$120,853.84	
		C300-Operating Expenses	\$9,569.17	\$280,800.00	\$73,977.83				2073-Non-Exempt Staff (C1)	\$0.00	\$0.00	\$11,520.00	
		MTDC Total	\$17,142.18	\$849,651.00	\$397,159.95				2140-Bonus Payments	\$0.00	\$0.00	\$57.87	
	Non-MTDC	C300-Operating Expenses	\$0.00	\$10,800.00	\$0.00				2E10-Budget - Salaries	\$0.00	\$45,389.00	\$0.00	
		Non-MTDC Total	\$0.00	\$10,800.00	\$0.00				2390-Fringe Rate Faculty	\$774.48	\$0.00	\$34,288.04	
B100-Direct Costs Total			\$17,142.18	\$860,451.00	\$397,159.95				2792-Fringe Rate Limited Benefit	\$563.46	\$0.00	\$23,062.55	
B600-Indirect Costs	F&A	C600-Indirect Costs	\$4,456.95	\$223,716.00	\$103,261.70				2799-Fringe Rate Lecturer Services	\$0.00	\$0.00	\$964.38	
		F&A Total	\$4,456.95	\$223,716.00	\$103,261.70				2E20-Budget - Fringe Benefits	\$0.00	\$132,462.00	\$0.00	
B600-Indirect Costs Total			\$4,456.95	\$223,716.00	\$103,261.70				C300-Operating Expenses	3716-Cb. Maint & Repair Services-Equipment	\$0.00	\$0.00	\$651.00
Grand Total			\$21,599.13	\$1,084,167.00	\$500,421.65				3719-Cb. Printing & Reproduction Services	\$0.00	\$0.00	\$2,803.00	
									3752-Other Contractual Services	\$0.00	\$0.00	\$785.00	
									3914-Laboratory Supplies	\$7,168.75	\$0.00	\$33,249.95	
									3945-Balance Supplies	\$1,705.42	\$0.00	\$34,443.88	

Since the column label Object Level C is not blue (indicating it is a hyperlink), you can still use the RIGHT Click technique to “include” other data elements (e.g., Funding Source, Project)

Object Level C	Period Activity Amount	Budget	LTD
C100-Salaries	↓ Sort Column	\$436,389.00	\$264,947.15
C200-Fringe Benefits	Show Subtotal	\$132,462.00	\$58,234.97
C300-Operating Expenses	Show Row level Grand Total	\$280,800.00	\$73,977.83
		\$849,651.00	\$397,159.95
C300-Operating Expenses	Exclude column	\$10,800.00	\$0.00
	Includes column		Object Level D
	Move Column		Object Level E
C600-Indirect Costs		\$4,456.95	Object
		\$4,456.95	Funding Source
		\$4,456.95	Project
		\$21,599.13	\$1,084,167.00

In Budget to Actuals Summary and Detail reports, however, column labels such as Object Level C are hyperlinks, so you click it (left mouse button) to drill one level down. OR you can also use the right click method (above) to “include” data elements (Dept, org, purpose, etc.).

Before					After				
Activities Category	Object Level A	Object Level C	Period Activity Amount		Activities Category	Object Level A	Object Level C	Object Level D Code - Description	Period Activity Amount
Net Asset Beginning Balance	A900-Net Position	C900-N/A- Unrestricted - B	\$0.00		Net Asset Beginning Balance	A900-Net Position	C900-N/A- Unrestricted - B	D900-N/A- Unrestricted - C	\$0.00
	A900-Net Position Total		\$0.00			A900-Net Position Total			\$0.00
Net Asset Beginning Balance Total			\$0.00		Net Asset Beginning Balance Total				\$0.00
Net Activity Deficit/(Surplus)	A000-Revenues	C000-Revenues	(\$1,044,025.84)		Net Activity Deficit/(Surplus)	A000-Revenues	C000-Revenues	D030-Gifts	\$0.00
	A000-Revenues Total		(\$1,044,025.84)					D060-Contracts & Grants Revenue	(\$468,518.81)
	A100-Expenses	C100-Salaries	\$346,319.61					D072-Sales & Services - Aux Enterpr	\$0.00
		C200-Fringe Benefits	\$85,126.34					D090-Miscellaneous Revenue	\$4,500.00
		C300-Operating Expenses	\$138,758.19					A000-Revenues Total	(\$464,018.81)
		C600-Indirect Costs	\$190,758.72					A100-Expenses	C100-Salaries
	A100-Expenses Total		\$760,962.86					D100-Faculty Salaries	\$181,752.75
Net Activity Deficit/(Surplus) Total			(\$283,962.98)					D101-Staff Salaries	\$57,579.27
								D103-Limited Benefit Salaries	\$81,323.31
								D104-Student Salaries	\$17,595.65

Once you have drilled to view the columns you wish, saving your customization will keep the structure every time you run that report (Save and Apply Customizations options are accessed via the Gear icon).