

# FORVIS<sup>®</sup>

Business Technology Solutions

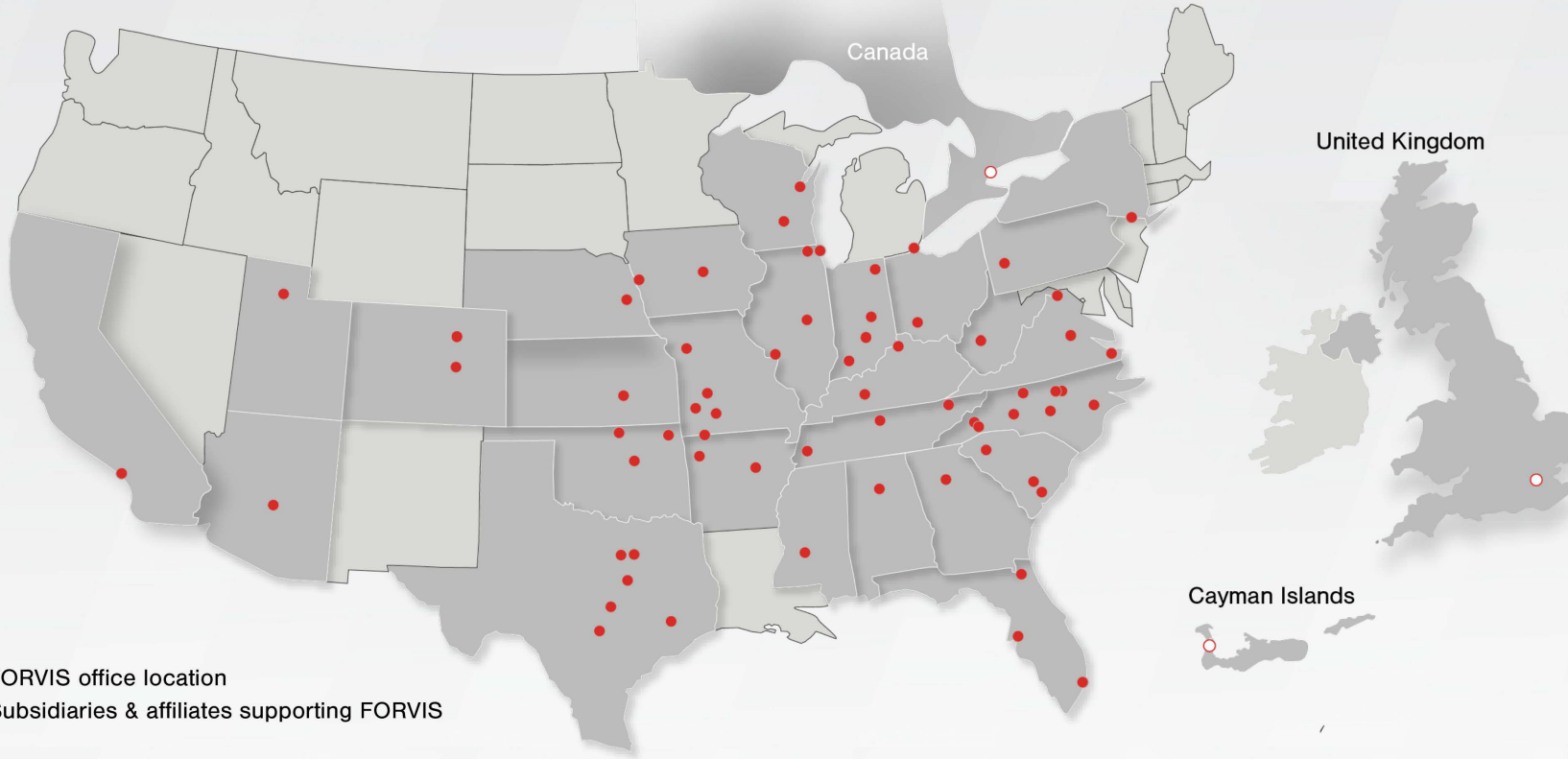
## The Art of Drilling Down in Solver

October 24, 2023

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- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

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- FORVIS Capital Advisors, LLC
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- FORVIS Global Advisory Canada ULC\*\*
- FORVIS Global Advisory Ltd. UK\*\*
- TALENT SHIFT, LLC

**FORVIS**

## By the Numbers

**Top 10**  
U.S. Public Accounting Firm \*

**27**  
States + Canada, U.K., & \*\*  
Cayman Islands

**10+**  
Industries

**68**  
Markets

**500+**  
Partners & Principals

**6,000+**  
Team Members



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

# Business Technology Solutions

**FORVIS** Business Technology Solutions provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

In addition, our Insights & Automation services include business intelligence (BI) and robotic process automation (RPA) assessments, implementations, and training.



We are an award-winning partner of Solver Global, which itself is highly rated by G2, a leading software marketplace.

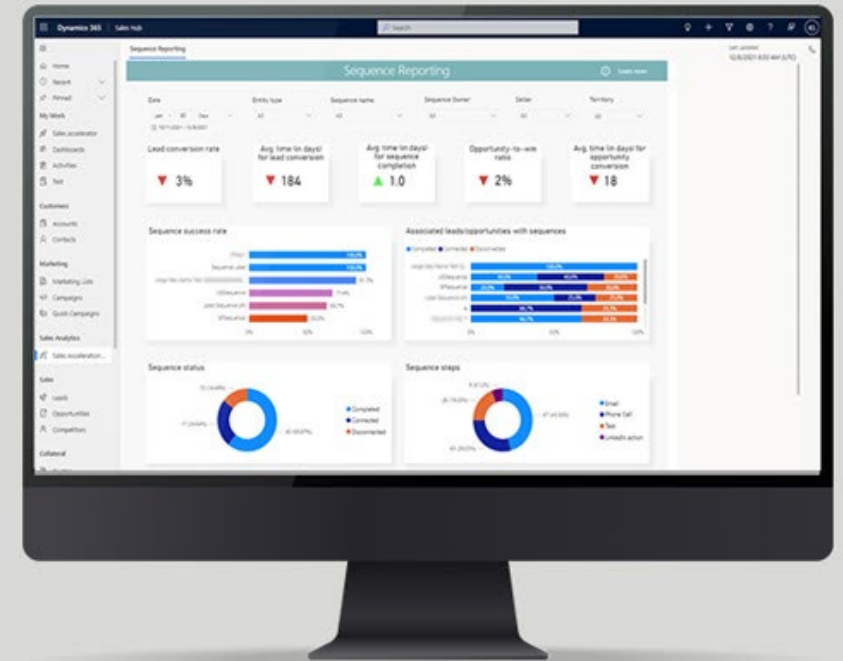
## FORVIS

Microsoft  
Partner

Sage Partner

ORACLE  
NETSUITE  
Solution Provider

salesforce  
PARTNER



From sales forecasting to financial reporting,  
learn what CRM and ERP technologies can do.

# Presenters



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# Objectives

- Discuss the standard drilldown behavior
- Describe how to create a custom Drill-To Definition
- Demonstrate how to create a custom Drill-To Definition to view other types of data
- Identify how to use the pivot table drilldown option

# Agenda

9:00 AM ● Standard Drilldown Behavior

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9:10 AM ● Creating Custom Drill-To Definitions

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9:40 AM ● Pivot Table Drilldown

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# Standard Drilldown Behavior

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**FORV/S**

FORVIS is a trademark of FORVIS, LLP, registered with the U.S. Patent and Trademark Office.



# Drilldowns



Built-in functionality



Based on the source module



Controlled by security

# Drilldowns



Must be logged into Solver



Includes all dimensions



Includes all module attributes

A blackboard with white chalk text. The text is written in three lines: "DON'T", "TELL ME...", and "...SHOW ME!". The background of the blackboard is dark and textured, with some faint, illegible markings. The text is written in a casual, hand-drawn style.

DON'T  
TELL ME...  
...SHOW ME!

**FORV/S**

# Creating Custom Drill-To Definitions

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# Drill-To Definitions



Default can be disabled



Confined to a report



Parameters, groups, hard-coded values

# Drill-To Definitions

Create

Create from amount field



Add

Add fields to display area



Add

Add fields to filter area

**FORV/S**

A blackboard with white chalk text. The text is arranged in three lines: "DON'T", "TELL ME...", and "...SHOW ME!". The background is a light gray with a subtle geometric pattern of overlapping triangles. A red decorative shape is in the top right corner.

DON'T  
TELL ME...  
...SHOW ME!

**FORV/S**

# What's Next

## Creating Solver Reports Using Groups & Trees

Tuesday, November 28 | 10–11 a.m. ET

[forvis.com/webinar/2023/10/art-drilling-down-in-solver](https://forvis.com/webinar/2023/10/art-drilling-down-in-solver)

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# Questions?

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