

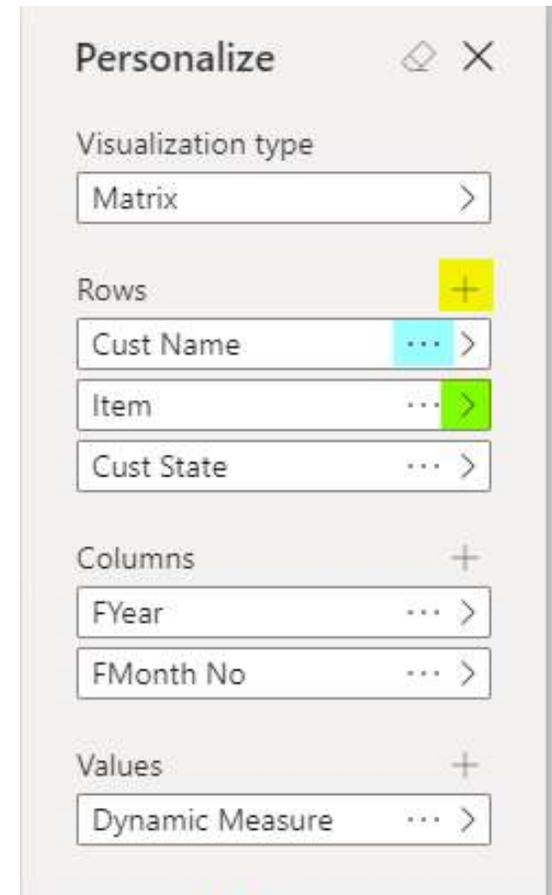
Step 1

- Hover over the top right of the matrix to display additional options, then click on this icon  to **Personalize the Visual**



Step 2

- Add fields to the Rows, Columns or Values using the + icon
- Remove existing fields using the ellipsis ...
- Change existing fields using the > icon
- Change the order of fields by dragging and dropping
- Click the X in the top right when you are satisfied



Step 3

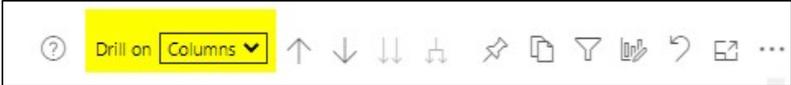
- Click the + or – to expand or collapse **single** items in view.

Item	Item Class	FYear	Cust Name
Total			
WIDGET03 - Widget 03 - Standard cost item	Total		
	Widget Class		
WIDGET02 - Widget 02 - Serial numbered item	Total		
	Widget Class	Total	
		Plaza Construction	
		Widget Credit Card	

- Or right-click on a section to expand or collapse that **entire level**

Total		
WIDGET03 - Widget 03 - Standard cost item		
WIDGET02 -	Expand	Selection
WIDGET01 -	Collapse	Entire level
TRAVEL - Bu	Drill down	All
TEE-WHI-L	Show as table	

Step 4

- Hover over the top right of the visual to bring up the “Drill on” capabilities. 
- If Years and Months are visible, make sure Columns is selected and select the Up or Double-Down() arrow to expand or collapse the visual by Years or Months. ↓↓
- You can change the “Drill on” to Rows and expand/collapse a single level or all levels at once.
- If you need to reset the visual, you can select the “Reset to Default” option along the top bar on the browser page

