How do I view more detail in a report or graph

There are times you'll want to limit the transactions included in the report or graph so that you're viewing just the data you want to see. Other times you want to see more information, not less. One way to accomplish this is with QuickZoom.

When used in a nontransaction report, QuickZoom displays a transaction report that lists all transactions that the report represents. From a transaction report, QuickZoom takes you directly to the transaction that a line item represents. For example, to examine the individual transactions that are represented by an Actual amount in a budget report, double-click it to see the list of transactions that make up that amount.

Several reports also include one-click trend graphs, so you can quickly and easily see your average monthly spending by category or payee for the past year.

There are a number of ways you can view more detail in a report or graph. Click the topic below that you want more information about.

Adjust report column widths
If the column names in the report are separated by column markers (two parallel lines), you can adjust the column width. (Not all reports are adjustable.)

- Click the column marker to the right of the column heading and drag the marker to the right to widen a column.
  - **What happens to the other columns?**
    The widths of all other columns in the report remain the same.
- Click the column marker to the right of the column heading and drag the marker to the left to make a column narrower.
  - **What happens to the other columns?**
    The widths of all other columns in the report remain the same.
- Click the marker to the right of the column's heading and drag the marker to the left, past its left column marker, to remove a column.
- To redisplay a column you've removed, click Customize, and in the Show Columns list, select the name of the column you want to redisplay.

Since names are usually shorter than descriptions, displaying column names instead of descriptions is an easy way to narrow your columns and allow more columns to show:

1. Choose **Reports** menu > **Reports & Graphs Center.**
2. In the upper-right corner, click **Preferences**.
3. In the **Select preference type** list, select **Reports** only.
4. Change the **Account display** and **Category** display settings to **Name**.

Notes

- For reports that have column markers between column headings, you can drag these markers to adjust column width, but you cannot rearrange the order of the columns.
- To rearrange your columns, you can export or print the report to a file and then edit it in a word processing program.

Zoom in on report data

1. Choose **Reports** menu > **Reports & Graphs Center**.
2. In the **Quicken Standard Reports** list on the left, click the section you want.
3. Select the report you want.
4. Click **Show Report.**
5. Select an amount in the report. The pointer changes to a magnifying glass. Double-click the amount.
   - **What happens next?**
     Quicken displays a QuickZoom report listing the transactions that make up the amount you double-clicked (or, if you double-click an amount in a transaction report, Quicken displays the register or transaction list). Each QuickZoom report is added to the report history so you can easily reopen the QuickZoom report.

Notes

- You cannot use this method from all lines in all reports. If the pointer doesn't change, you can't see more detail about that line.
- If you'd prefer to have Quicken take you from a specific transaction in an investment report to the investment form you completed for that transaction, change the Reports only preferences.

Zoom in on graph data
When you use QuickZoom in a graph, QuickZoom either creates a second graph that shows more detail about an element in the original graph, or it creates a transaction report that lists the transactions that the report represents.

To view more detail in a graph:

- Double-click a bar or pie slice to use QuickZoom to see the next level of detail.
- Click or point to a bar, pie slice, or legend and wait for a moment to display an exact value.
  - Bars reveal the description and amount.
  - Slices reveal the category or security amount. If the amount is positive, the percentage is added. The percentage is always the value relative to the total pie even if you hid one or more slices (with SHIFT+click).
  - Legend items reveal the total amount for the time period.
- Hold down the SHIFT key and click the slice or bar you want to hide. Hiding a category (a slice in a pie chart or a bar in a bar graph) is different from excluding it when you customize a graph:
  - If you exclude a category by clearing it from the Categories tab, Quicken doesn't include the category in its analysis.

- If you hide a category (by using SHIFT+click in a displayed graph), Quicken still calculates its value in the graph, but doesn't display the value. You can see this because Quicken displays a subtotal instead of a total at the bottom of the graph legend. To show a hidden item, create the graph again. (You can also exclude a category by clearing the **Categories** check box on the **Categories** tab of the **Customize** dialog if you do, Quicken won't include the category in its analysis. You can exclude securities in the same way.)

View a trend graph for expenses by category or payee

For the Spending by Payee and Spending by Category report or graph, as well as the itemized payees and Itemized Categories reports, Quicken includes one-click trend graphs, so you can quickly and easily see your average monthly spending for each category or payee for the past year.

ⓘ **Note for our Canadian Customers**

The following terms will be different in the Canadian releases of Quicken.

Canada: "Cheque" / United States: "Check"
Canada: "Colour" / United States: "Color"
Canada: "Centre" / United States: "Center"
Canada: "Realise" / United States: "Realize"
Canada: "Behaviour" / United States: "Behavior"
Canada: "Analyse" / United States: "Analyze"