Other Functions

Insert Info Fields About What’s Included in the Workbook (Data Source Name, Last Data Update, Etc.)

Note: An Info Field can be inserted into an empty cell within a workbook to provide additional information on data displayed in workbooks. This includes the Data Source (Query) name, Last Data Update, selection variables in prompts, any filters, etc. There is a more robust method and a quicker method with less options.

Note: As a reminder, workbooks must be refreshed after opening before options are available.

1. Choose one of the following methods to insert an Info Field:
   - To quickly insert from the most commonly used Info Fields, use the Info Field button on the Analysis Design tab of the toolbar.
   - OR ALTERNATIVELY…
   - To insert by viewing ALL available Info Fields, use the Design Panel in the Analysis tab (ensure the Display Design Panel is selected via the Design button).
Other Functions

2. Regardless of method chosen, click into a blank field where you’d like to insert the Info Field.

3. To quickly insert Info Fields, use the **Drop-down** for the **Info Fields** button on the **Analysis Design Toolbar** and choose the desired field (Data Source Name in this example).
4. To insert by using the Design Panel to see ALL available Info fields, select the Information tab at the bottom of the Analysis Design Panel and follow the next steps.

5. Review all the Info Fields that may be added to provide details about what is included in the workbook.

6. To insert the field:
   - Click on the Info Field to be added to the workbook (Data Source Name in this example).
   - Drag and drop the field into the selected empty cell using the red outline indicating where the field will be inserted.
7. Regardless of the method used, review the results showing the Info Field added in the workbook to provide more details and add more fields as needed.
Other Functions (cont.)

Display or Suppress Repeated Members in Rows

Note: Depending on the query being used and formatting of a workbook, there may be rows of repeated members or values displayed in a column OR repeated members may already be suppressed. An example of a member is the Cost Object displayed for each row of an amount in the Fund Trial Balance query. This function in the Analysis Design tab allows you to display the repeated members for rows where those values are already suppressed OR suppress those repeated members if already displayed.

1. To display or suppress repeated members or values for rows in a column, use the Analysis Design tab.

2. Click on the Drop-down for the Crosstab button and select from an option that varies based on the view:
   - Click to check the Repeat Members option to display repeated values for rows in a column.
   - Click to uncheck the Repeat Members option to suppress the display of repeated values for rows in a column.

Note: As a reminder, workbooks must be refreshed after opening before options are available.
3. Review the results where the repeated members or values for rows in a column are now either displayed or suppressed as desired (this example shows repeated members of Cost Objects are now displayed in all rows).

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>Actual Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duke CostObject</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>KSDUKE000157061</td>
<td>A/R SMALL BALANCE WRITE-OFFS</td>
<td>157061</td>
<td>695600</td>
<td>LOSSES, DAMAGES</td>
<td>323</td>
</tr>
<tr>
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<td>1570410</td>
<td>600000</td>
<td>ADMIN EFFORT(STAFF)</td>
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<td>620000</td>
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</tr>
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</tbody>
</table>
Other Functions (cont.)

Insert a New Line

Note: New lines may be inserted into the crosstab of a workbook for formatting as needed. New lines CANNOT be inserted next to data cells.

1. To display or suppress repeated members or values for rows in a column, use the Analysis Design tab.

2. Select the desired cell in the row of the crosstab where you would like to insert the new line (either above or below).

3. Click on the Drop-down for the New Lines button and select the desired option to insert a line after a selected cell, before a selected cell or at the top or bottom of the results (Rows before Members… or Rows after Members…).

Note: For the Rows before Members… and Rows after Members, the location of the cell selected is not as important as those two options insert at the top or bottom regardless of the cell selected.

4. Review the results where the row is now inserted.
Other Functions (cont.)

Smart Copy

Note: A data source (crosstab or chart) that is currently displayed in a workbook can be copied and inserted or pasted into the same sheet or a different sheet within the workbook.

1. To display or suppress repeated members or values for rows in a column, use the Analysis Design tab.
2. Select any cell within the crosstab results or chart to be copied.
3. Click on the Smart Copy button on the Analysis Design toolbar to copy the crosstab or chart into an Analysis clipboard.
4. Click in a cell to select where to insert the copied crosstab or chart in either the current sheet or a different sheet.
5. Click on the Smart Paste button on the Analysis Design toolbar.

Note: As a reminder, workbooks must be refreshed after opening before options are available.
Other Functions (cont.)

6. Update any prompts as needed in the Prompts window and click OK.

7. Review the results where the crosstab or chart is now inserted in the desired location (in this example a different sheet).
Other Functions (cont.)

Grouping Crosstabs if More Than One Data Source is Inserted in a Workbook

**Note:** Two or more crosstabs of results can be grouped together so that they look and behave as if they were one crosstab. The major difference between grouping crosstabs and linking dimensions is that grouping crosstabs will have only one dimension and merge the crosstabs, whereas linking dimensions will move the servant crosstab adjacent to the master crosstab. See the next topic for Linking Dimensions.

1. Review the following points about grouping crosstabs:
   - When grouped, crosstabs are moved close together with no space in between them.
   - The crosstab from which you trigger the grouping is defined as the master crosstab and determines the structure of the common crosstab.
   - The grouped crosstabs behave as one entity.
   - The functionality provided within ribbon and context menu is adjusted to the unified behavior of the grouped crosstabs.
   - Dimensions can only be moved to or within the master crosstab.
   - Filtering dimensions is only possible for dimensions of the master crosstab.
   - The crosstabs need to have a similar row structure so that grouping the crosstabs is feasible.
2. Insert at least two data sources (embedded queries) in the workbook.

3. Select the **Analysis Design** tab on the top toolbar ribbon.

4. Select the dimension in the crosstab row that is to be the master crosstab (in this example Duke Cost Object in the first crosstab is selected).

5. Click on the Drop-down of the Combine button under the Analysis Design tab and select **Group Crosstab > With Crosstab 2** (option varies by number of crosstab results inserted).

**Note:** The process of grouping crosstabs may take several minutes to complete. Time will vary, depending upon the queries embedded and number of records.
6. Review the results of the crosstabs now grouped by the dimension selected (Duke Cost Object in this example).

7. To undo the grouping at any time, use the Combine button under the Analysis Design tab and [de-select Group Crosstab > With Crosstab 2](option varies by number of crosstab results inserted)
Linking Dimensions if More Than One Data Source is Inserted in the Workbook

Note: The dimensions of two or more crosstabs of results can be linked so that the actions on one dimension affects the same dimension in the other data source crosstabs the same way. The crosstabs are still separate in the workbook. The major difference between linking dimensions and grouping crosstabs is that linking dimensions will move the servant crosstab adjacent to the master crosstab, whereas grouping crosstabs will have only one dimension and merge the crosstabs. See the previous topic for Grouping Crosstabs.

1. Review the following points about grouping crosstabs:
   - Linking dimensions is useful for example you wish to filter by the same member, or to have the same hierarchy drill operation for all the crosstabs.
   - After linking, the linked dimensions behave simultaneously, especially with regards to filter and hierarchy navigation.
   - The crosstab from which you trigger the linking is defined as master and the other crosstab is defined as servant.
2. Insert at least two data sources (embedded queries) in the workbook.

3. Select the **Analysis Design** tab on the top toolbar ribbon.

4. Select the dimension in the crosstab row that is to be the master crosstab (in this example Duke Cost Object in the first crosstab is selected).

5. Click on the Drop-down of the **Combine** button under the Analysis Design tab and select **Link Dimension > To Duke CostObject of DS_2** (option varies depending on how many crosstab results have been inserted).
6. Review the results of the crosstabs now linked grouped by the dimension selected (Duke Cost Object in this example) and note the following:

- In the Analysis tab in the Design Panel, a **Linked** icon is displayed next to the dimension name to show that this dimension is linked.

- Any filters or hierarchy actions taken on this dimension will affect those linked crosstabs.

7. To undo the linked dimension at any time, use the **Combine** button under the Analysis Design tab and de-select **Linked Dimension > To Duke CostObject of DS_2** (option varies by number of crosstab results inserted).
Other Functions (cont.)

Reset Data Source

Note: Sometimes there are changes to the data source which are not reflected in your workbook. If so, you need to reset the Data Source. Unfortunately, analytical changes you made, like filter settings, are lost when there is a reset of the data source. In addition, if a data source like a query is already embedded into a workbook prior to the change, even a reset will not “fetch” any changes. See the Appendix section at the end of the guide for a table containing more on when a reset is required or not.

1. Click once into an active cell within the crosstab to select a cell within the results.

2. Once an active cell is selected, click the Refresh All button on the toolbar and select the Reset Data Source (option will be active if a reset is needed).

   • To refresh a single data source (i.e. query) in a workbook with multiple queries, click in an active cell in that crosstab and select the Refresh Data Source option.

Note: See the Appendix section of this guide and the Table for Reset Data Source for additional information on when a reset is required.