

Q&A Executive Training

Lesson 4 Drill Tree Pane

Overview

The Drill Tree displays:

- Open workbooks
- Worksheets within each workbook
- Dependent worksheets created by analysis functions
 - Drill Down
 - Breakout
 - Cube Analysis.
- Archive worksheets, displayed in blue

A Drill Path is a hierarchy of primary and dependent worksheets displayed in the Drill Tree.

- Drill Paths can be saved and replayed.

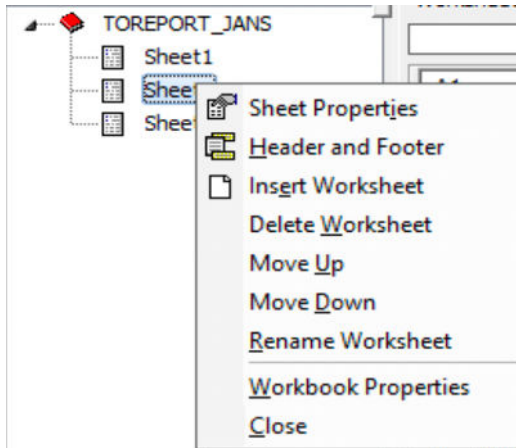
Drill Tree Functions

Order Worksheets

In Extract Mode, you can reorder primary worksheets within a workbook.

To reorder worksheets,

- right-click a worksheet and
- select Move Up or Move Down

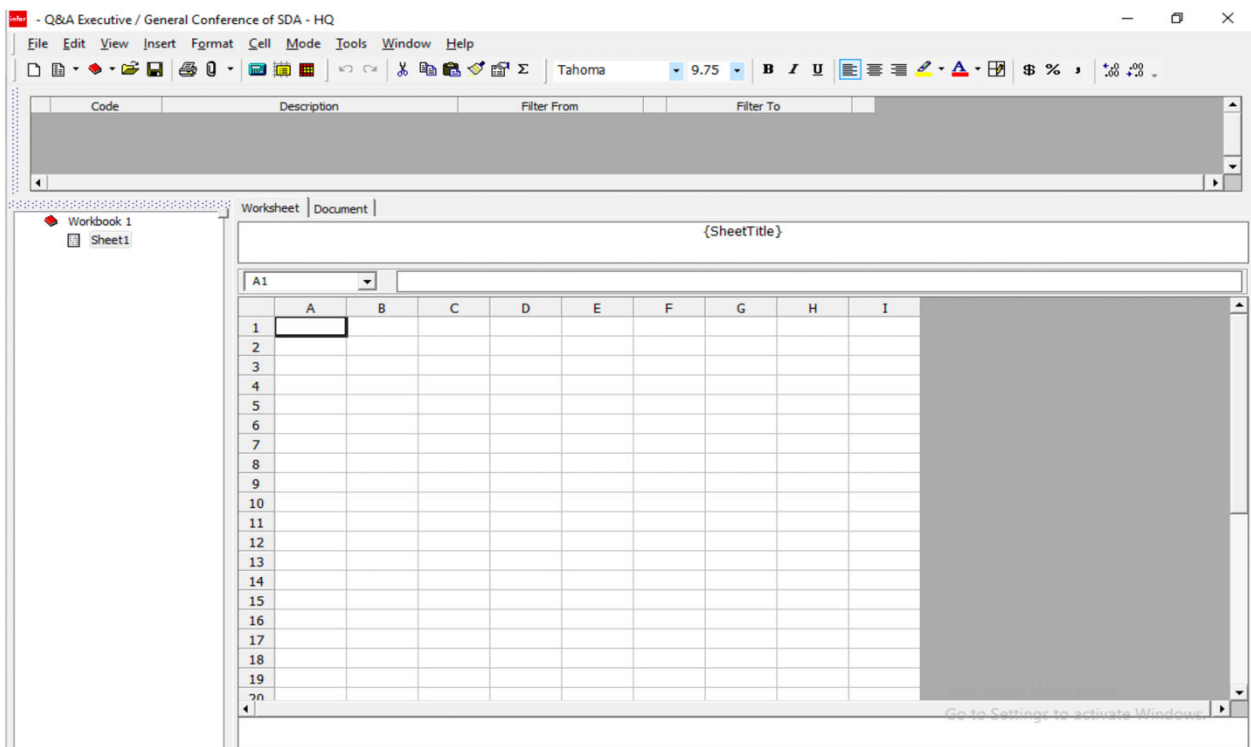


If you reorder the worksheets, the new order is retained in the workbook, is saved, and then reopened.

Hide Drill Tree

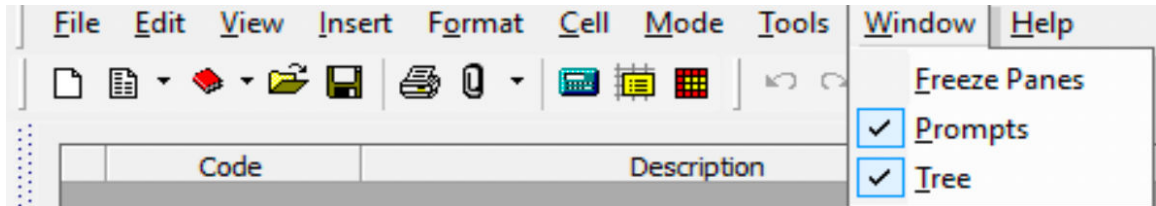
The Drill Tree can be hidden.

In this screenshot, the Drill Tree is displayed:



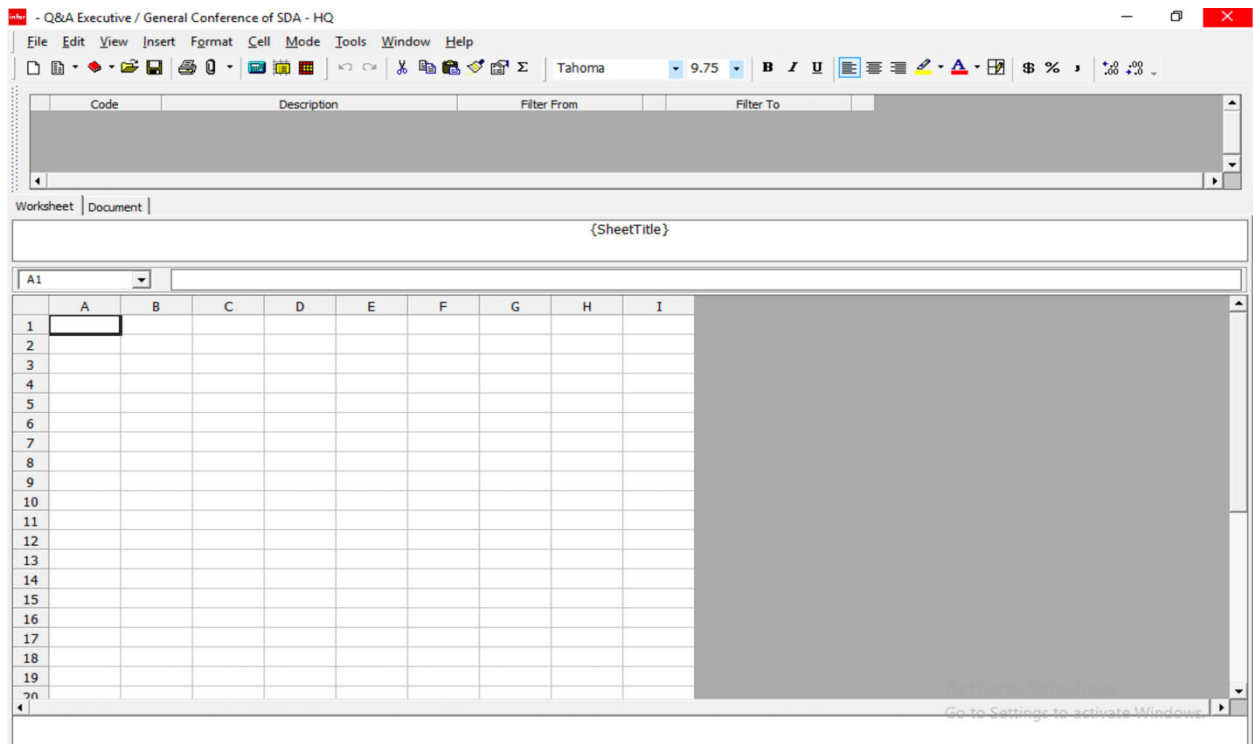
To Hide Drill Tree

- Go to the Window menu on the menu bar



- Uncheck Tree

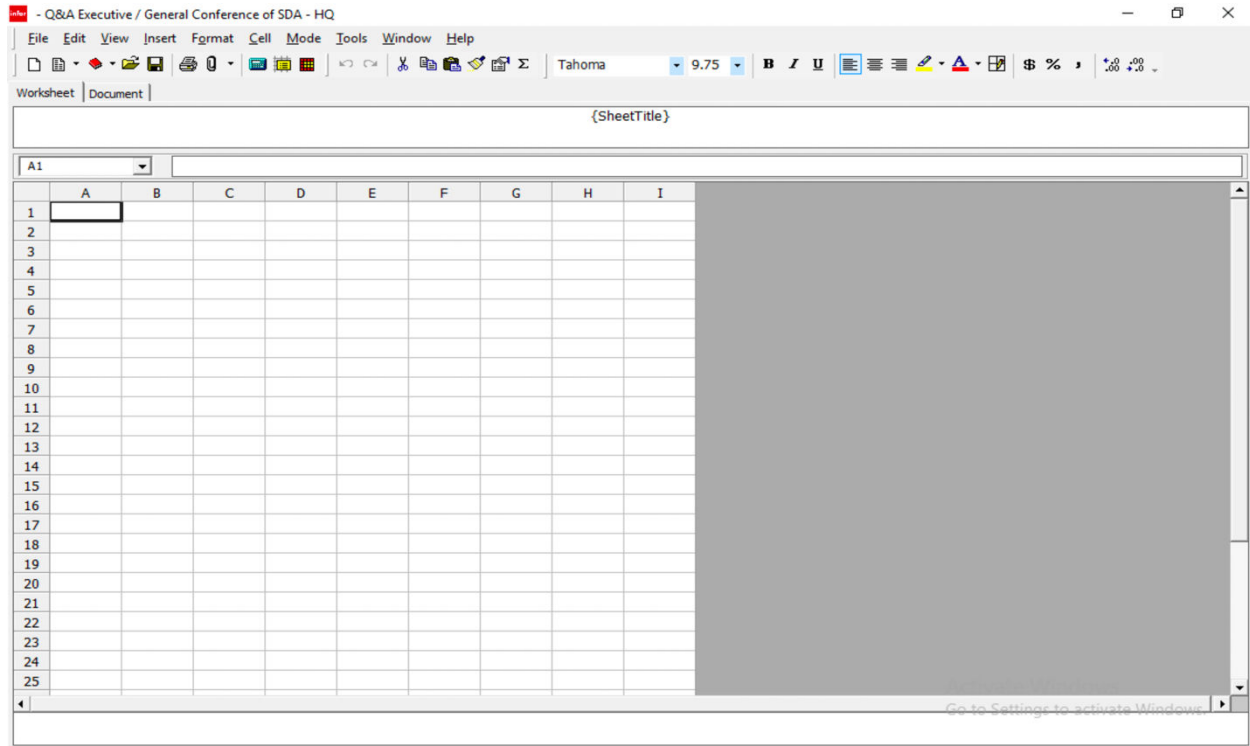
In this screenshot, the Drill Tree has been hidden:



To Hide Prompts

- Go to Window menu on the menu bar
- Uncheck Prompts

In this screenshot, both Prompts and Drill Tree have been hidden:

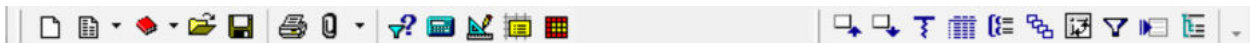


Previous and Next

If the Drill Tree has been hidden, use the Previous Worksheet and Next Worksheet buttons in Extract Mode to navigate between worksheets.



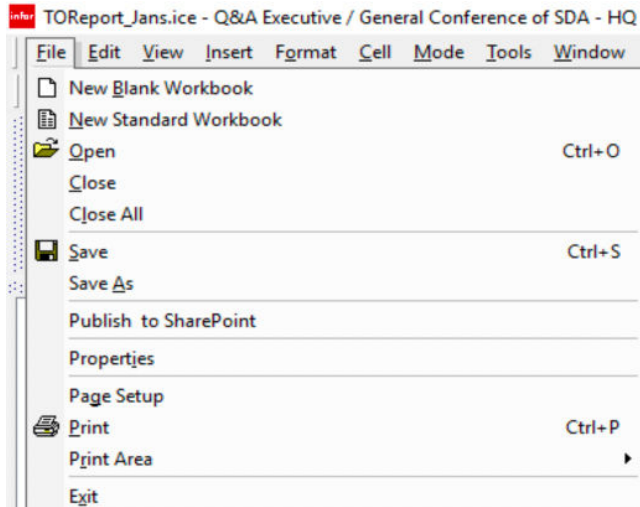
The Previous/Next buttons are located with the drills on the Extract Mode toolbar:



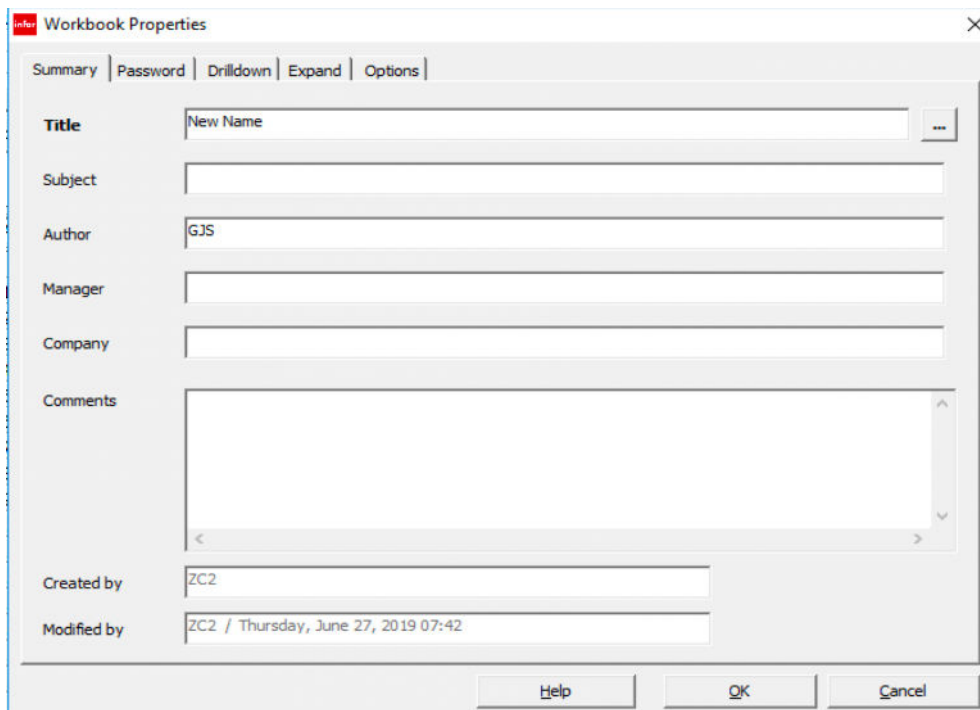
Workbook and Worksheet Operations

Rename workbook

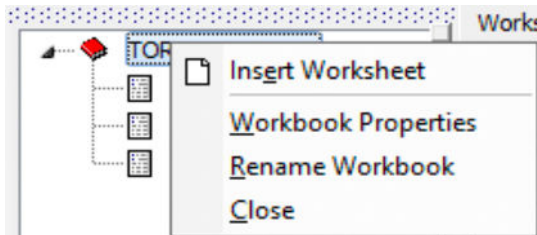
- Go to Design Mode
- Click the Workbook in the Drill Tree
- Select File



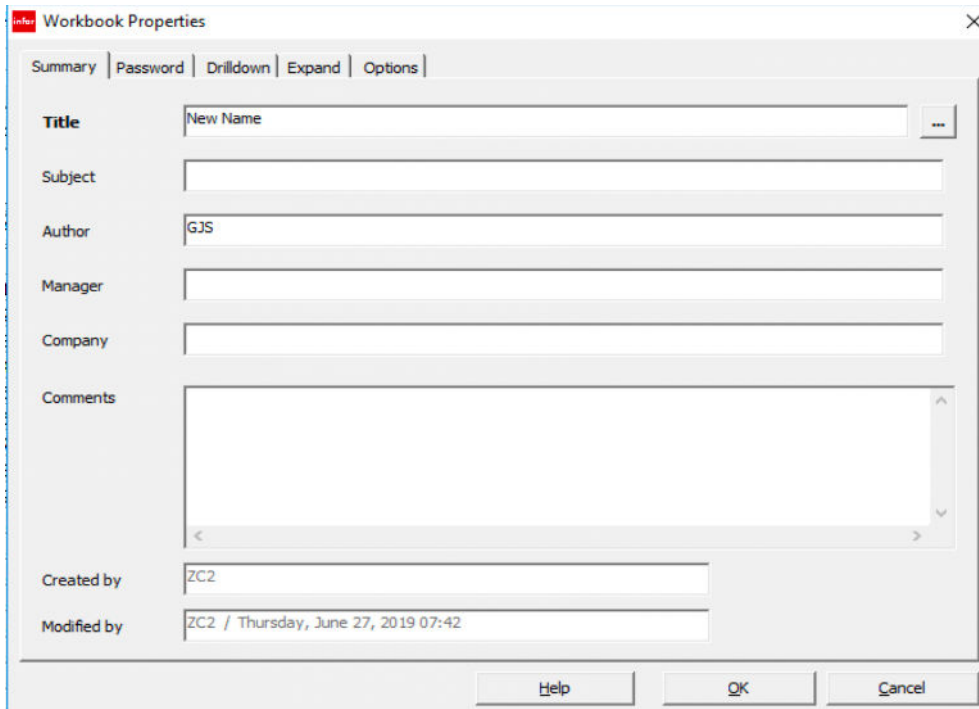
- Properties
- Type the new name for the workbook in the Title field



- Click OK
- Or
- Right-click on the workbook



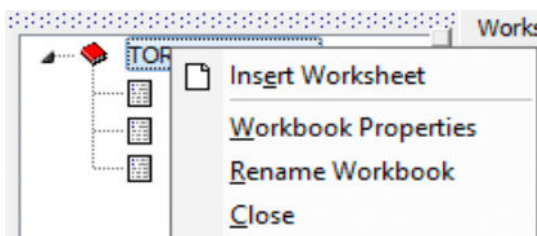
- Select Workbook Properties
- Type new name for the workbook in the Title field



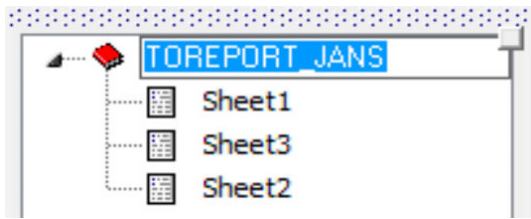
- Click OK

Or

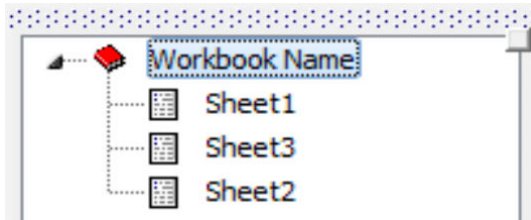
- Right-click on the workbook
- Select Rename Workbook



- The workbook title will be highlighted in blue and enclosed in a rectangle

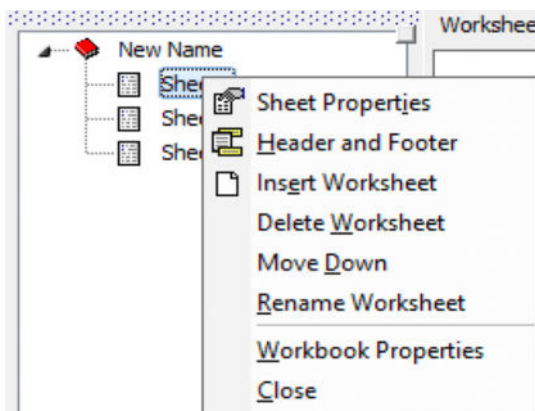


- Type in the new name for the workbook

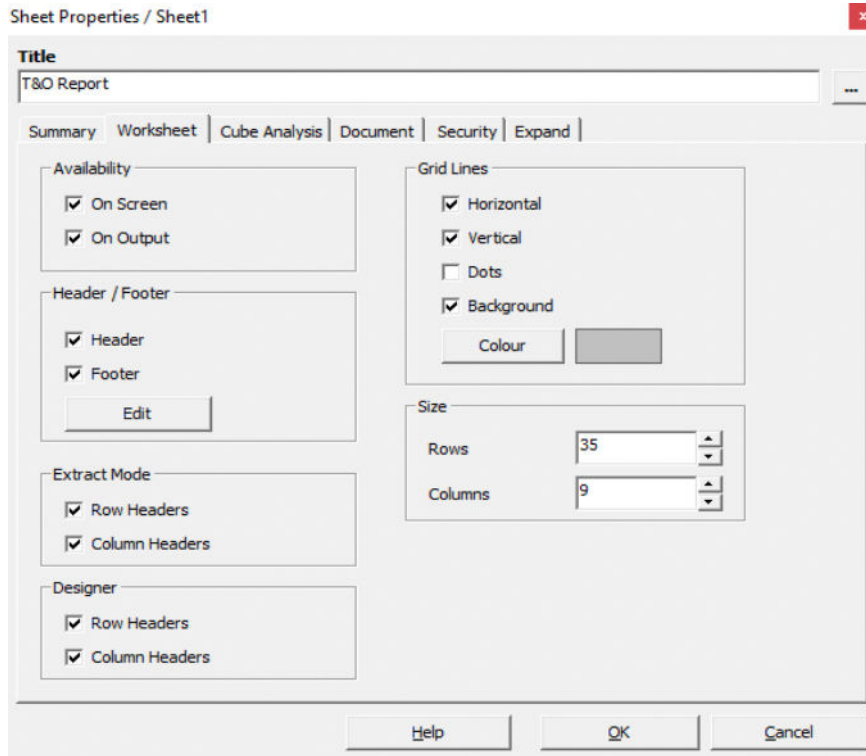


Rename Worksheet

- Right-click the worksheet



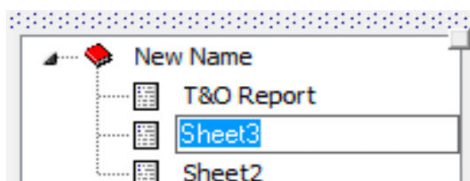
- Select Sheet Properties



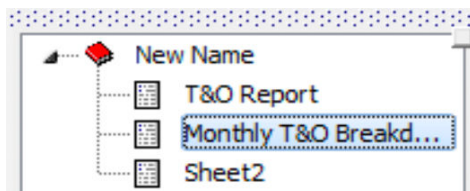
- Type the name for the worksheet in the Title field
- Click OK

Or

- Right-click on the worksheet name in the Drill Tree
 - The worksheet title will be highlighted in blue and enclosed in a rectangle

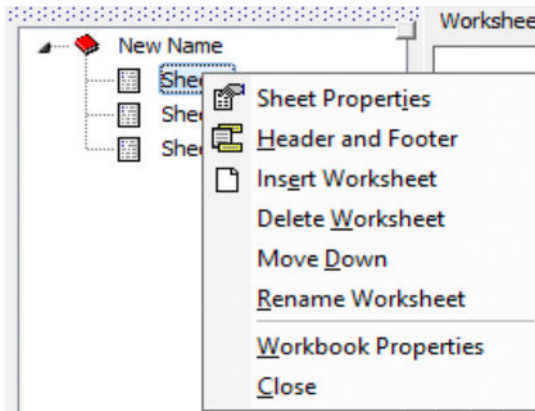


- Type in the new name



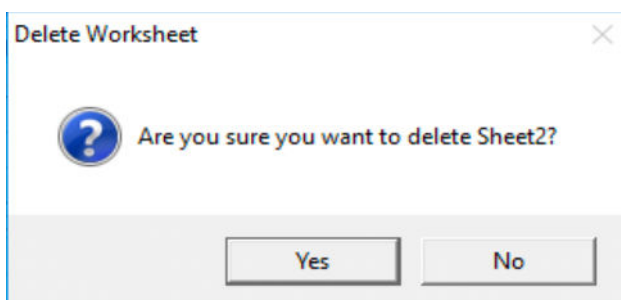
Delete Worksheet

- Right-click to select a worksheet in the Drill Tree, in Designer Mode



- Select Delete Worksheet

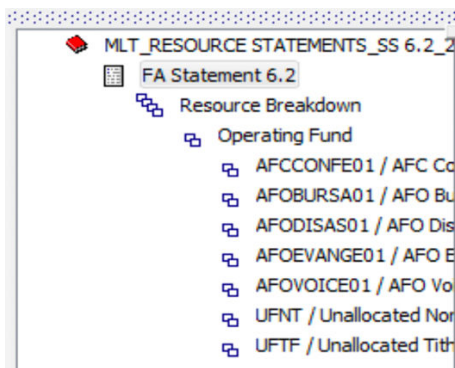
A confirmation message is displayed.



- Click Yes

Removing Dependent Worksheets

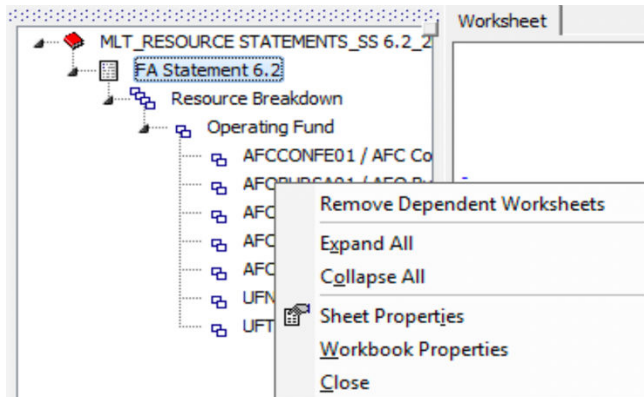
Dependent worksheets are created when drills and analyzes are run. They are displayed within the Drill Tree in a parent/child relationship.



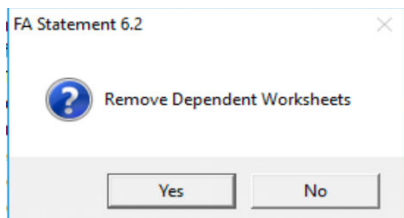
These dependent worksheets can be saved and reopened with the workbook, or they can be removed.

To remove Dependent Worksheets:

- In Drill Tree, right-click on the worksheet linking to the Dependent Worksheets
 - The shortcut menu will appear



- Click Remove Dependent Worksheets
 - A confirmation message is displayed



- Click Yes

All Dependent Worksheets below the selected worksheet are removed.

Freeze Panes

You can use the Freeze Panes option to freeze all worksheet cells above a selected cell. This comes in handy if you want to be able to see column headers as you scroll down a report.

To freeze panes in a report:

- In Extract Mode you can freeze panes by selecting a cell
 - In the screenshot below, we have selected cell C13

Statements_SS 6.2-3_2017.1.3.0.ice - Q&A Executive / General Conference of SDA - HQ

Output Mode Tools Window Help
Freeze Panes
☒ Tree

SOURCE STATEMENTS_SS 6.2-3
Statement 6.2
Resource Breakdown
Operating Fund

AFCCONF01 / AFC Co
AFOBURSA01 / AFO Bu
AFODISA01 / AFO Dis
AFOEVANGE01 / AFO E
AFOVOICE01 / AFO Vo
UFNT / Unallocated Nor
UFTF / Unallocated Tit

Adventist Demonstration Business Unit
Statement Of Financial Activity
Resource Statement -
For Twelve Months Ending December 31, 2014 and 2013

Σ 4232198 RR 604600

	A	B	C	D	E	F	G	H	I	J	K	L
9												
10					YTD Actual		YTD Budget		YTD Budget		Budget Total	
11					2014		2014		Under (Over)		2014	
12												
13		611110	Tithe from Local Churches		5,996,840				(5,996,840)			
14		612110	Tithe from Employees		274,283				(274,283)			
15		612120	Tithes Off-States/Overseas									
16		617110	Tithe of Tithes to Columbia Union		(839,558)				839,558			
17		617120	Tithe % of Direct Tithe to Columbia Union		(1,199,368)				1,199,368			
18		619110	Tithe/Nontithe Exchange									
19		619120	Closed Account									
20		634110	Combined Offerings		3,884,681				(3,884,681)			
21		634111	Combined Offerings % to Higher Organizations		(2,330,809)				2,330,809			
22		634112	Combined Offerings % for Allocated Resources		(1,553,872)				1,553,872			
23		638110	Donated Income		83,739				(83,739)			
24		651110	Tithe Operating Appropriation Received									
25		671110	Inter-Departmental Services Income		150				(150)			
27		678110	Resource/Function/Project Funding Allocation		2,753,240				(2,753,240)			
30			Total Revenue		7,069,327		0		(7,069,327)		0	
31												
32												
33												
33		811110	Salary (Regular)		2,742,832				(2,742,832)			
34		811220	Car Depreciation Allowance		110,000				(110,000)			
35		811230	Child Allowance		34,980				(34,980)			

Extracted On: 10/6/2022
Extraction Time: 05:10

Page {PageNo} of {PageTotal}

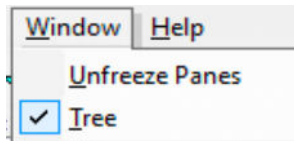
- Go to the Window menu on the menu bar
- Select Freeze Panes

[illegible]

- Now we can scroll through the report while still seeing the column headers

To Unfreeze Panes

- Go to the Window menu on the menu bar



- Select Unfreeze Panes

Sheet Properties

The Sheet Properties functionality is used to define the settings for the active worksheet. A worksheet consists of a worksheet, document, and can include Chart and Cube areas.

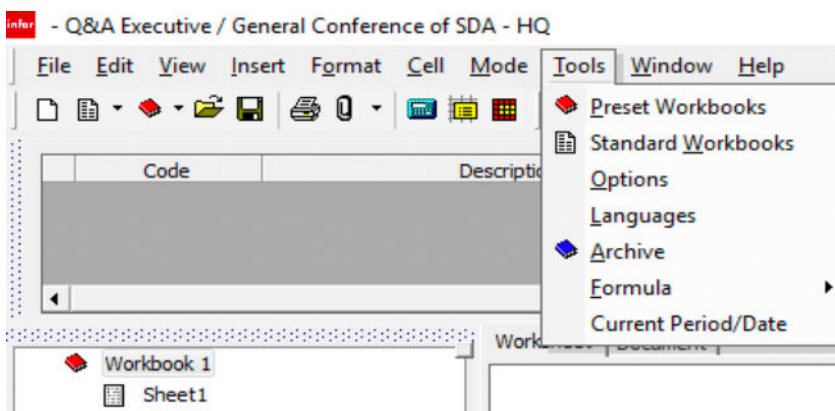
Set Defaults for New Worksheets

The Options interface enables the user to choose the default appearance and behavior of Q&A worksheets.

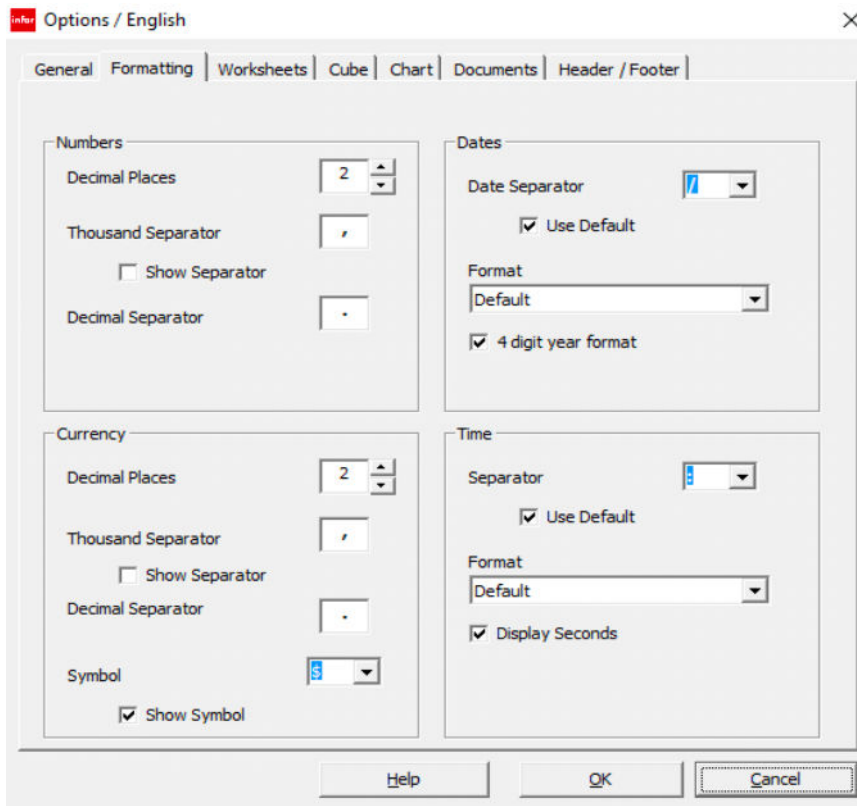
In existing reports, if you make changes in Options, the existing content of the worksheet will not be affected. For example, if you change the default decimal setting to three, existing values set to two decimals will not be changed; however, any values added after the changes are made will be affected.

To set defaults for new worksheets:

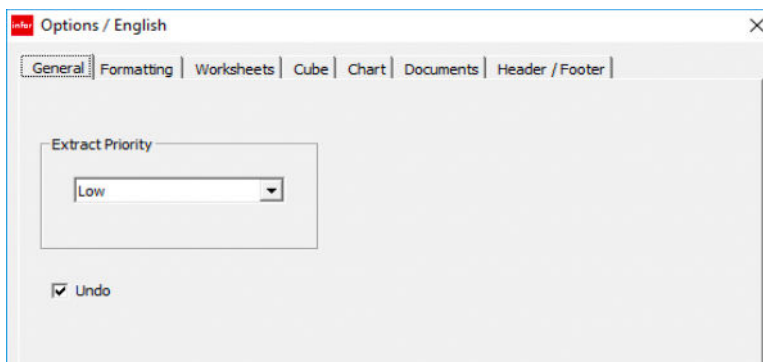
- Go to the Tools menu on the menu bar



- Select Options



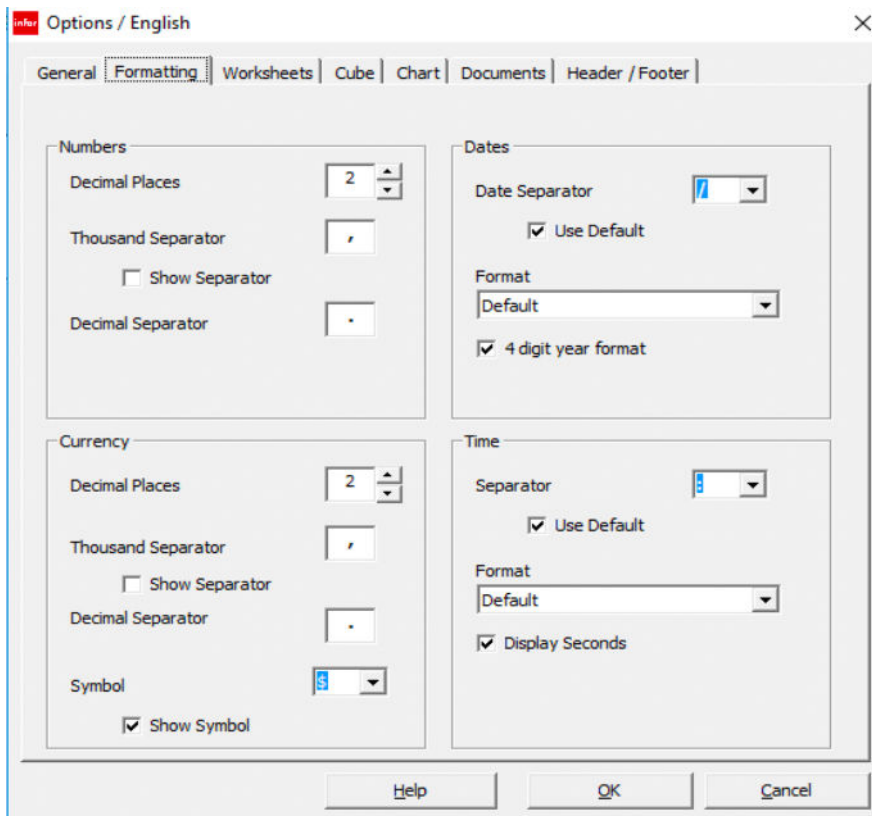
- Specify options on these tabs:
 - General Tab –



- Extract Priority
 - Sets Microsoft Windows application priority during extraction
 - Low (default) – lets users switch between other applications with minimal disruption to the screen or interface delays; extraction time is not affected
 - Normal – prioritizes Q&A Executive over other Windows applications

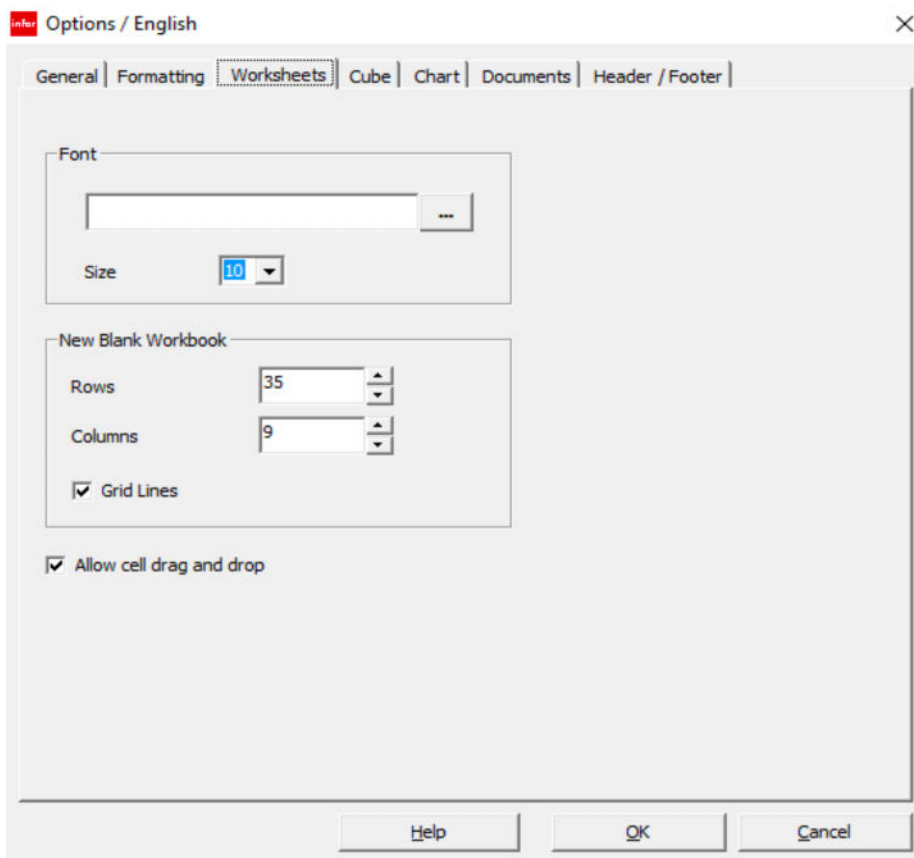
- Undo
 - Enable Undo if you want to be able to reverse up to 9 major actions, including creating report definitions and formatting
 - Disable Undo to improve the performance of large workbooks

○ Formatting Tab

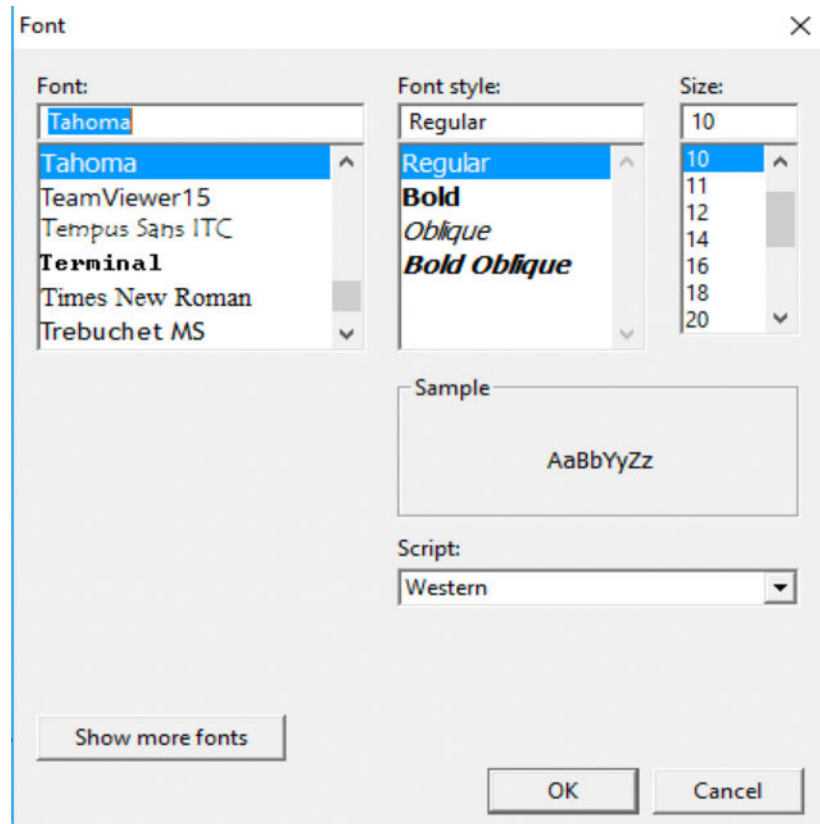


- Numbers:
 - Decimal Places – set the number of decimals to display
 - Thousand Separator – tick Show Separator if you want figures to be separated by thousands
 - Default is a “,” (comma)
 - Decimal Separator – Default is “.” (period)
 - A different symbol can be selected
- Currency:
 - Decimal Places – set the number of decimals to display for currency values
 - Thousand Separator – tick Show Separator to insert a separator character in currency values
 - Default is a “,” (comma)
 - Decimal Separator – Default is “.” (period)
 - A different symbol can be selected

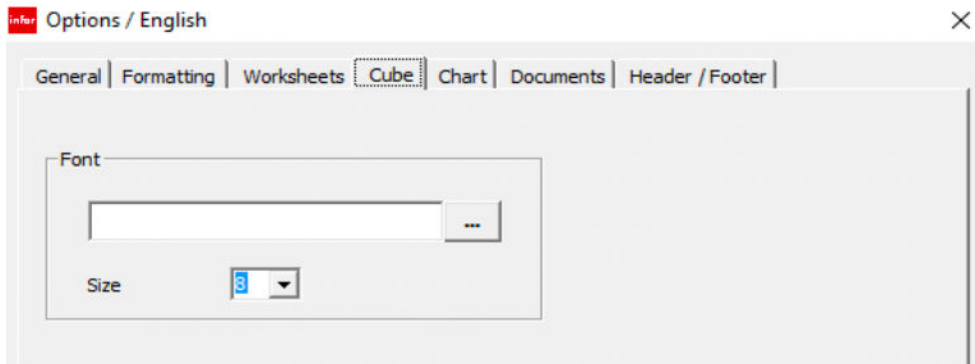
- Symbol – choose the symbol needed to denote currency values for the site
- Dates:
 - Date Separator – select the symbol to be used to separate the elements in dates
 - Default is “/”
 - Default date display – dd/mm/yyyy
 - Format – the system uses the Microsoft Windows date format as the default format; change as required
 - 4-digit year format – tick to display years as 4-digits
 - If left unticked, years are displayed as 2-digits; i.e., “11” as opposed to “2011”
- Time:
 - Time Separator – choose the separator for time values
 - Default is “:”
 - Format – Default time format is the Microsoft Windows time format
 - Select either 12 or 24 hour format
 - Display Seconds – enable to display time with hours, minutes, and seconds
- Worksheets Tab



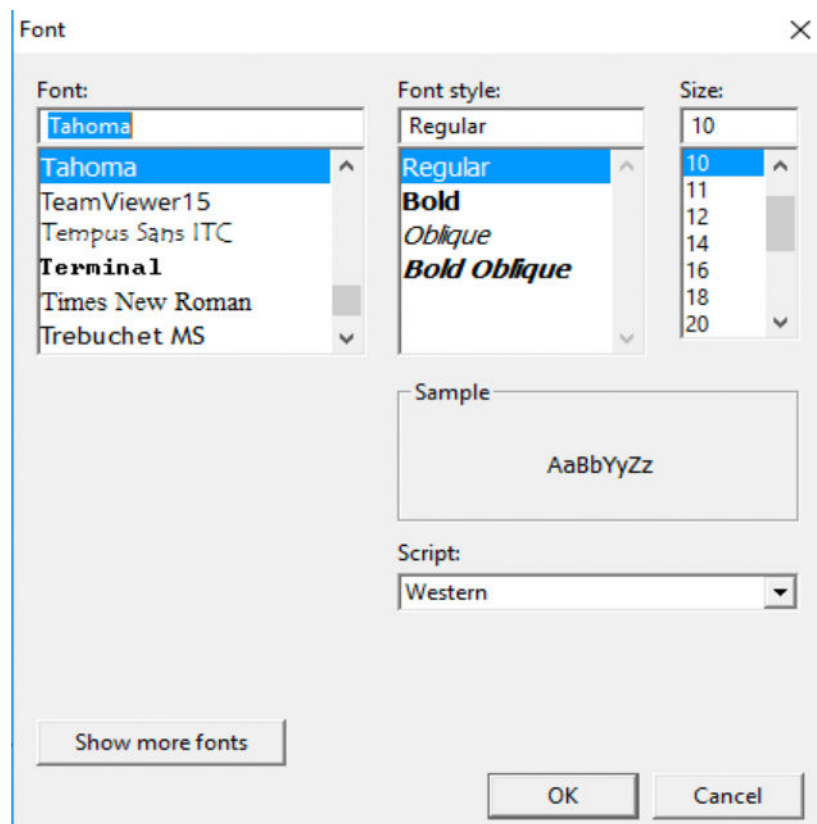
- The settings on this tab will influence the font used in the worksheet
 - Font – lets you choose a font and a font size for row content as well as row headers
 - To select, click the Assist button



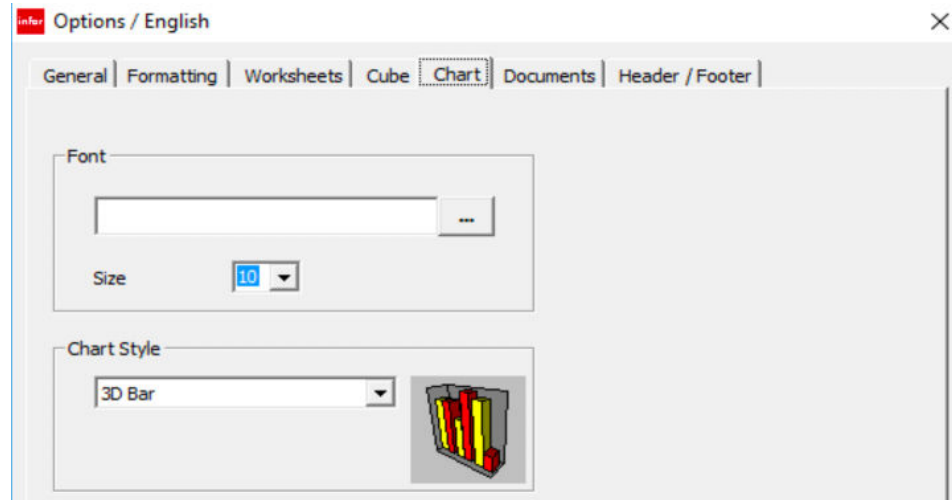
- Choose the font details you want
 - Click OK
 - Close the worksheet
 - Close Q&A Executive
 - Reopen Q&A Executive
 - Font changes will be displayed
 - New Blank Workbook – you can choose how many columns and rows will be displayed in a new workbook
 - Grid Lines can be turned on or off, as well
 - Allow drag and drop – tick if the user should be able to click the black border of a cell and drag the cell contents to another cell in a worksheet
- Cube Tab



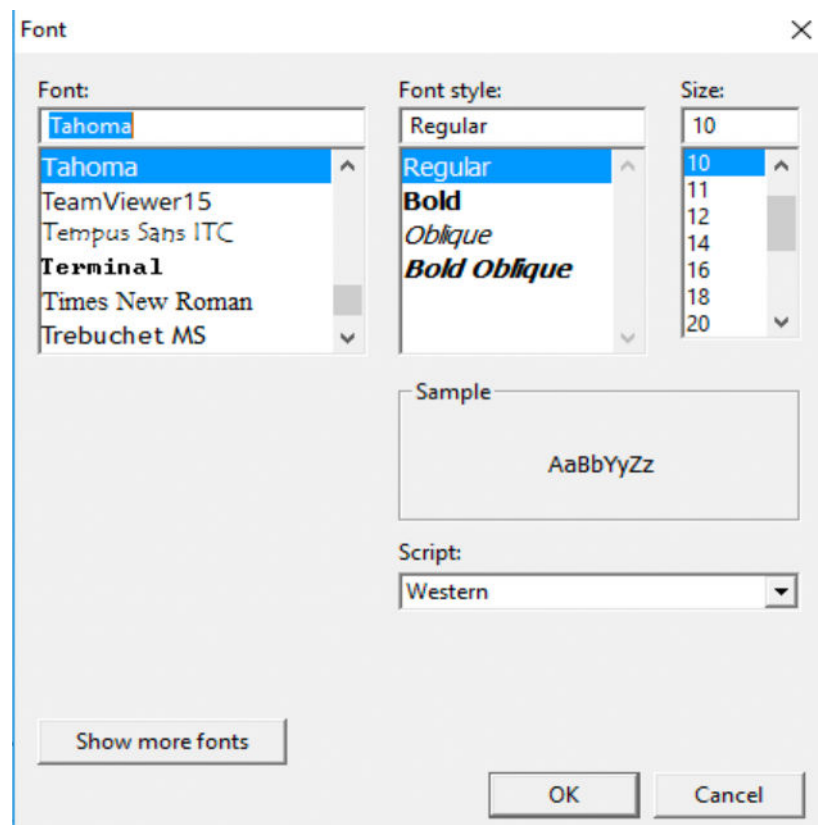
- Font – if necessary, you can select a font and change the font size for content displayed in cube
 - Click the assist button and choose the font



- Click OK
- Close worksheet
- Close Q&A Executive
- Reopen Q&A Executive
 - The changes will be incorporated
- Chart Tab

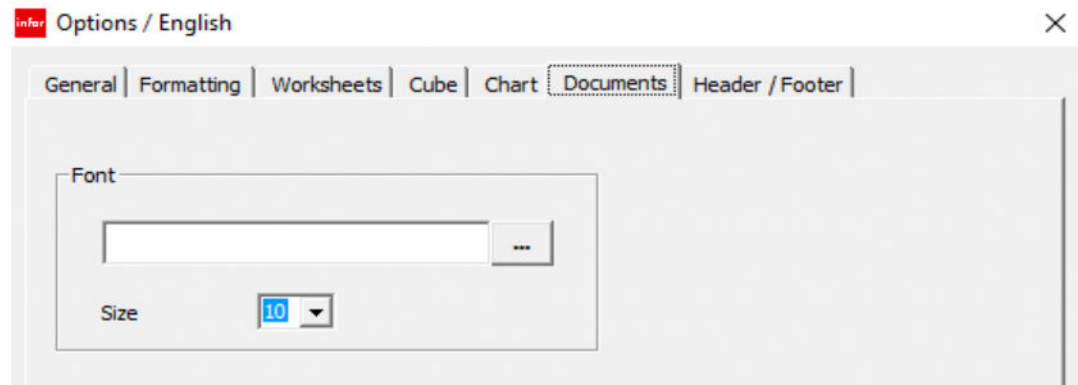


- Use the options in the Chart Tab to specify a font and font size for use in charts
- Set the default type of chart that will be used by Q&A
 - Font – click the assist button to select the font and font size

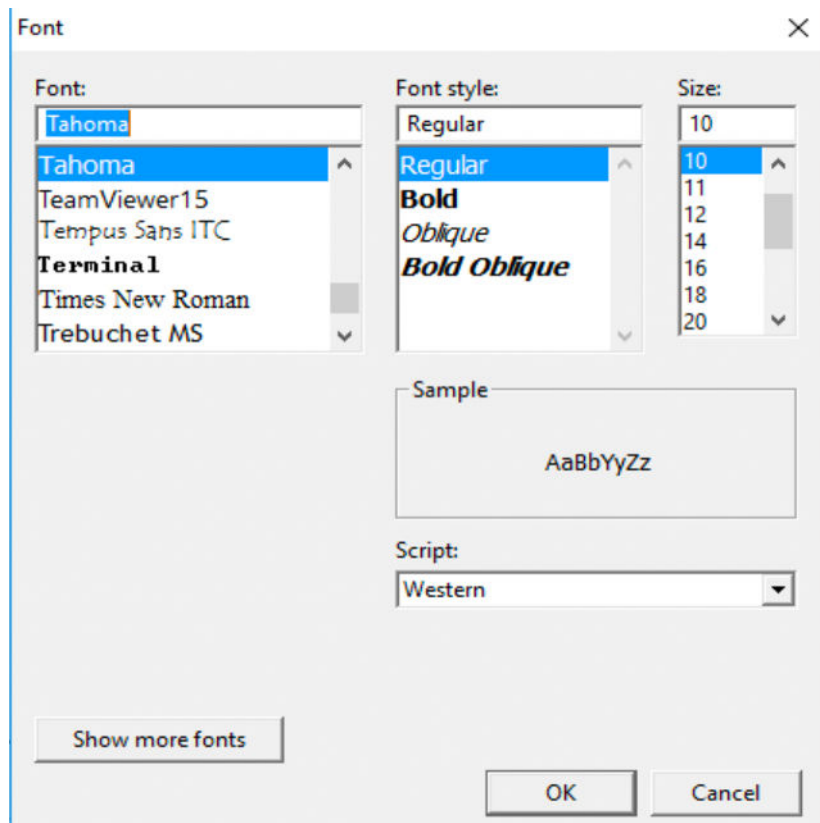


- Chart Style – choose the type of chart that will be created by default

- Documents Tab

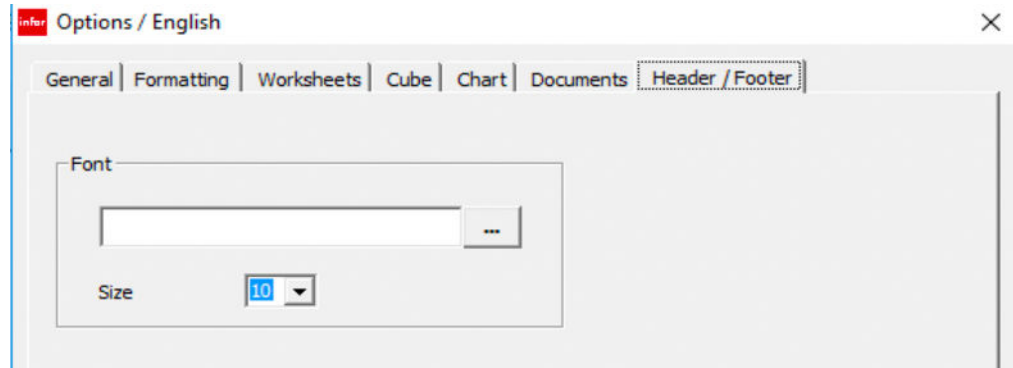


- The settings on this tab affect the font used for document content
 - Font – you can choose a font and font size
 - Click assist button

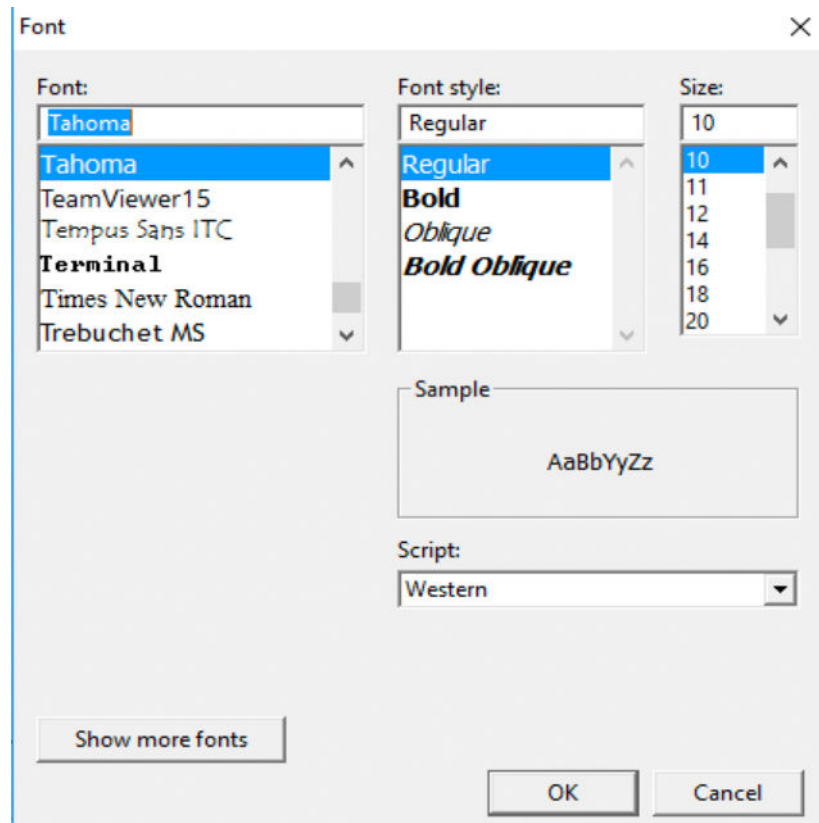


- Make your selections
- Click OK
- Close worksheet
- Close Q&A Executive
- Reopen Q&A Executive
- Reopen worksheet

- Header/Footer Tab



- Font – you can choose the font and font size for Header/Footer content
 - Click assist button



- Make your selections
- Click OK
- Close worksheet
- Close Q&A Executive
- Reopen Q&A Executive
- Reopen worksheet