

Q&A Training Agenda

Introduction

Overview

Data Extraction Definition Types

- Reference Link
- Summary Link
- Summary Report
- Detail Report

Data Analysis

- Data Send
- Recalculate

Drilldown

- Drill Path Manager
- Summary
- Transactions
- Breakout
- Expand

Alert

Options

- Zero Suppress
- Utilities
 - Migrate
 - Hierarchy Designer
 - Product Tasks
 - Formula
 - Change Password

Starting Q&A

Loading the Q&A into MS Excel

Logging On and Off Q&A

Changing Your Password

Q&A Toolbar and Menu

Query Definitions

Data Extraction Types

Definition Tab

- Filter window
- Selection List window
- Output window

Report Style Tab

- Report Style
- Output Table Names
- Output Data Item Names
- Totals

Working with Query Definition Forms

- Define Filter Criteria
- Select Output Fields
- Associated Buttons
- Ordering Output Data Items
- Sorting Output Data Items (Summary or Detail Reports only)
- Extract Mode
- User Defined Output
- Report Style – Tab 2 (Summary and Detail Reports only)

Detail Reports

Overview

Exercise 1 - Creating a Detail Report

Summary Reports

Summary

Exercise 2 – Creating Summary Reports

Extract Mode

- Statistical Extract Modes
- Non-Statistical Extract Modes

Exercise 3 - Extract Mode

Exercise 4 - Creating User Defined Outputs

Reference Link and Data Selectors

Overview

- Reference Link
- Data Selector / Automatic Filter Lookup

Exercise 5 – Creating Reference Links

Summary Link

Overview

Exercise 6 – Creating a Summary Link

Setting Query Filter Criteria

- Overview
- Lookup List
- Cell Reference
- Current Period and Date Override
- Pattern Matching and Wild Cards
- Exercise 7 - Filter Options
- Filtering With Segment

Combining Q&A Functions

- Overview
- Combining Q&A Functions

Drilldown

- Overview
- Summary Drill Down
- Transaction Drill Down
- Breakout
- Expand
- Drill Path Manager
- Exercise 8 – Using Drilldown

Macros

- Overview
- Recalculate the report
 - Recalculate workbook
 - Recalculate worksheet
 - Recalculate range
- Run and populate a query formula
- Insert and run a query formula
- Data Send
- Log on / log off server
 - The Logon macro
 - The Logoff macro

Data Send

- Overview
- Exercise 9 - Using Data Send