

# Introduction to Q&A 11.3 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

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