

PCS newsletter July 2014

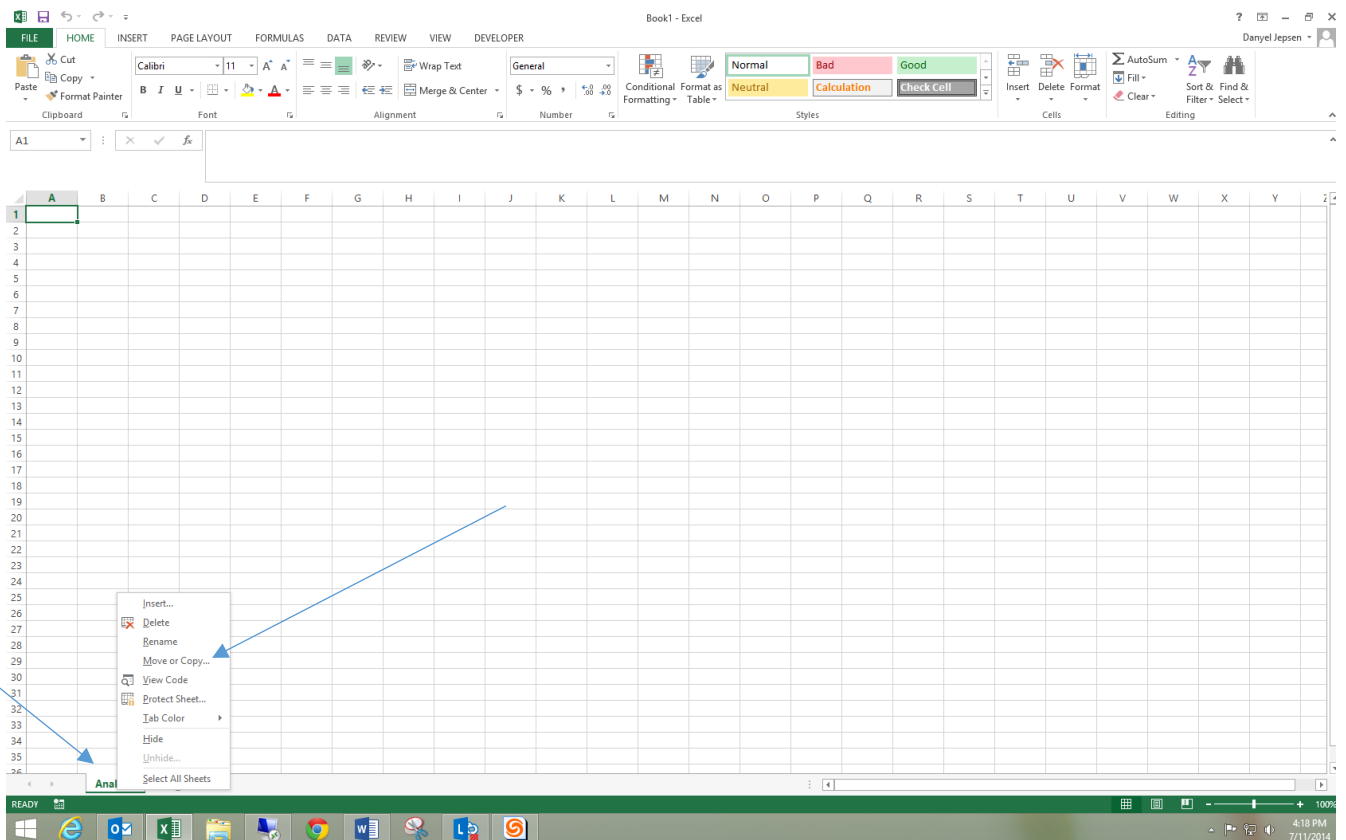
BI Templates

The concept of Excel templates was introduced during this year's User Group meeting. Templates are prebuilt data tables designed to deliver comprehensive information to be used by the client to write their own reports. Templates reduce the need for the user to be trained on how to access information from the actual database. The templates are also valuable tools to assist staff in building custom reports. These templates are available to all BI subscribers. A listing will be published soon with an updated report catalog.

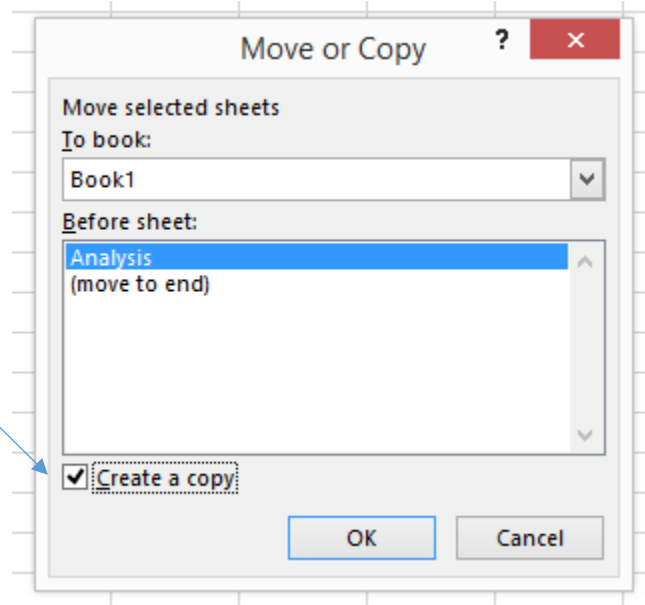
During the building of templates, a new method was discovered to copy complete worksheet attributes from one workbook to another. This is a very effective method to use existing reports to build new ones. Budget work papers, special department reports, and pro-forma financial statements are likely areas where this functionality might be used.

Below is an example of how easy it is to “copy” a worksheet.

- Right click on a worksheet tab and select “Move or Copy”.



- Select the “Create a copy” option.



- Use the drop-down to select “new book.” This creates a copy of the worksheet from an existing book to a new book.

