# **Function Changes (Design Mode)**

This document is intended to help users transition from UQ Reportal 4.2 to UQ Reportal 4.3.

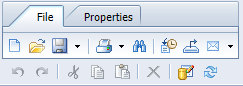
This document provides a guide to locating functions in the previous version of UQ Reportal when working on a report in **Design mode** in the upgraded environment. It lists the toolbars, contextual menus and explains where each item is in the new UQ Reportal.

If you are looking for a high-level overview of BO 4.3 changes, see the UQ Reportal resources - [Overview of Changes](https://www.pbi.uq.edu.au/content/UQReportalUpgrade.aspx).

**Reading mode:** If you are working on reports in Reading mode, a UQ Reportal resources [- Function Changes (Reading Mode)](https://www.pbi.uq.edu.au/content/UQReportalUpgrade.aspx)document is available.

## Contents

### Toolbar - File Tab



#### New

In the File section on the toolbar. You can also create a new report by clicking the **Web Intelligence** tile from the **BI** **Launch Pad**.



#### Open

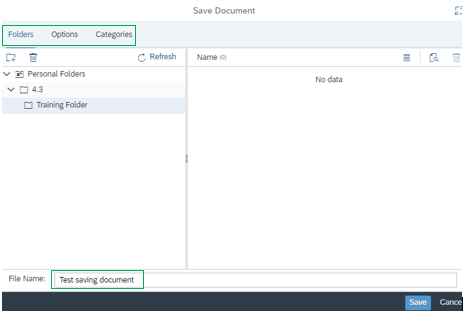
In the File section on the toolbar. Alternatively, from the **BI** **Launch Pad,** navigate to the report and open it.



#### Save/Save As

In the File section of the toolbar. The options are the same, however the layout of the Save As screen has changed.

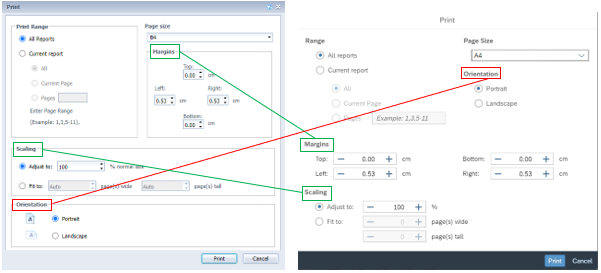
In the upgraded version, the Save As options into three separate tabs, compared to all options being on one screen in BO 4.2. The folder structure and file name fields are on the General tab. The description, key words, and setting checkboxes are on the Options tab. The Assign Categories selection is on the Categories tab.



#### Print

In the File section of the toolbar. No changes to the print options however the layout has changed.

A screenshot of a computer

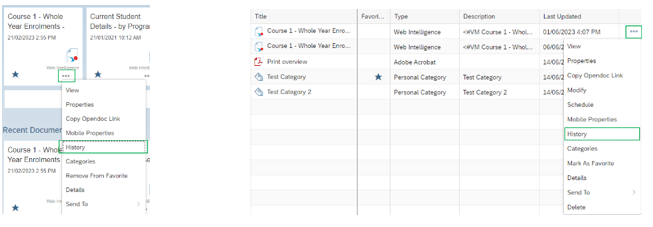
Description automatically generated with medium confidence

#### Find

No longer on toolbar. To search the document, use the browser's Find function.

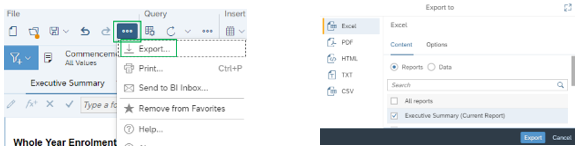
#### History

No longer on the toolbar. To view the history of instances of a document, from the BI Launch Pad, navigate to the document, click the ellipsis on the document tile or row, and select History.



#### Export

In the File section of the toolbar. The layout of the Export function has changed. All options are now located in the same screen and include exporting to HTML.

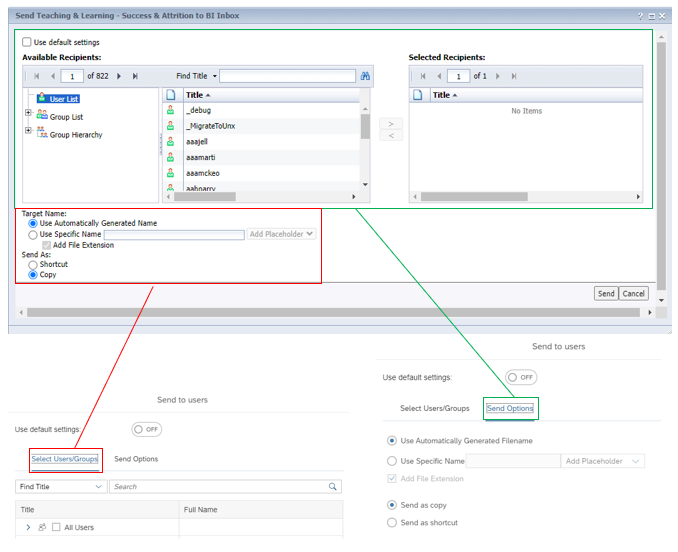


#### Send To

Send to User is available from the ellipsis in the **File** section of the toolbar as Send to BI Inbox:

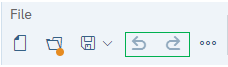
A screenshot of a computer screen

Description automatically generated with low confidence

The pop-up screen for sending a report to a user has been redesigned. You search for and select users on the Select Users/Groups tab. As with similar selection screens in the updated version, the move arrows have been replaced with checkboxes. The options for setting a target name and the type of file to send (copy or shortcut) are now on the Send Options tab.

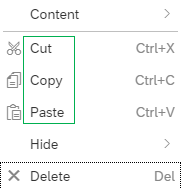
#### Undo/Redo

In the File section of the toolbar.



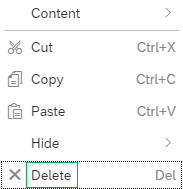
#### Cut/Copy/Paste

Use your keyboard shortcuts or the contextual menu. The below shows the menu when a data cell is selected and right clicked. The menu differs based on the selected element; however, if available, Cut, Copy and Paste are still near the top of each contextual menu.



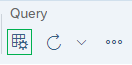
#### Delete

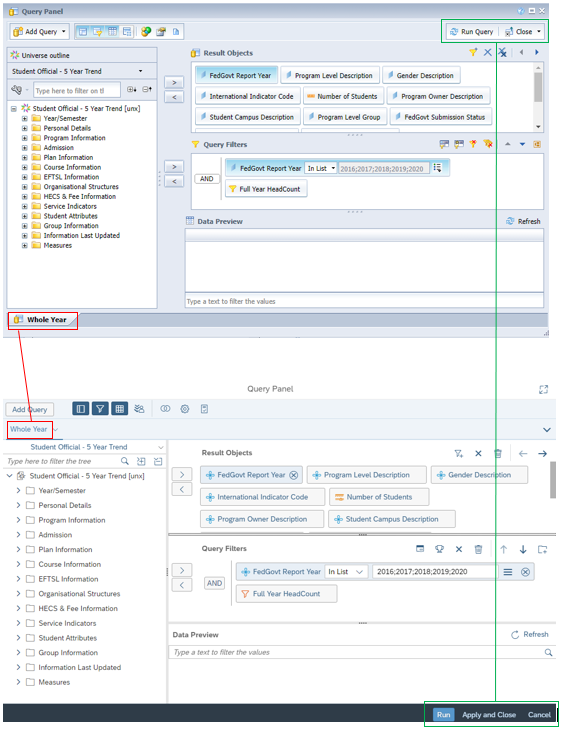
Use your keyboard shortcuts or the contextual menu by click right in on the selected element.



#### Edit Data Provider

On the toolbar. **Query** > **Edit**.



The **Query Panel** that displays is the same as in BO 4.2 except for button and tab locations. In 4.3, the buttons for Run, Apply Changes and Close (no longer under the Close drop-down list), and Cancel (replaces Revert Changes and Close option under the Close drop-down list) are at the bottom of the screen. If a report as multiple queries, they are listed near the top of the screen in 4.3

#### Refresh

On the toolbar. **Query** > **Refresh**.

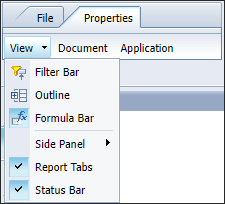


The drop-down list has options to refresh all the queries, or an Advanced refresh which allows for refresh of specific queries. The Prompts screen that displays has the same options but in a different interface

A screenshot of a computer

Description automatically generated with medium confidence

### Toolbar - Properties Tab

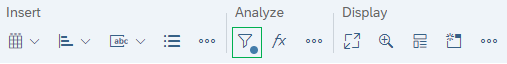


#### View drop-down list (Filter Bar, Outline, Formula Bar, Side Panel, Report Tabs, Status Bar)

#### Filter bar

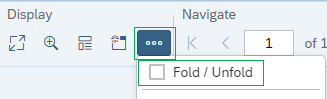
On toolbar - Analyze > **Filter Bar**

The Filter Bar shows currently available/applied Input Controls and Drill filters.



#### Outline

On toolbar - **Display** > Ellipsis icon > **Fold/Unfold**

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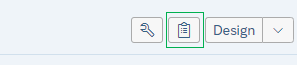
#### Formula Bar

On toolbar - Analyze > **Formula Bar**



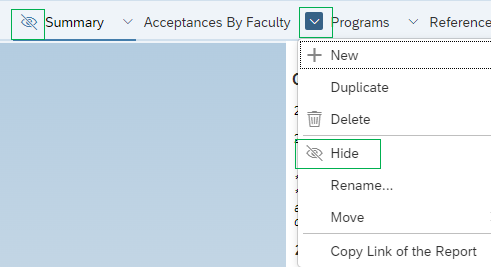
#### Side Panel

The image below shows the location of the Main Panel which opens and closes the panel.



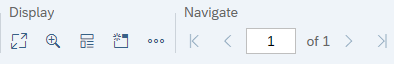
#### Report Tabs

Individual report tabs can be hidden in 4.3 by selecting **Hide** from the drop-down list in the report tab. If a tab is hidden, it has the Hide icon next to its name.



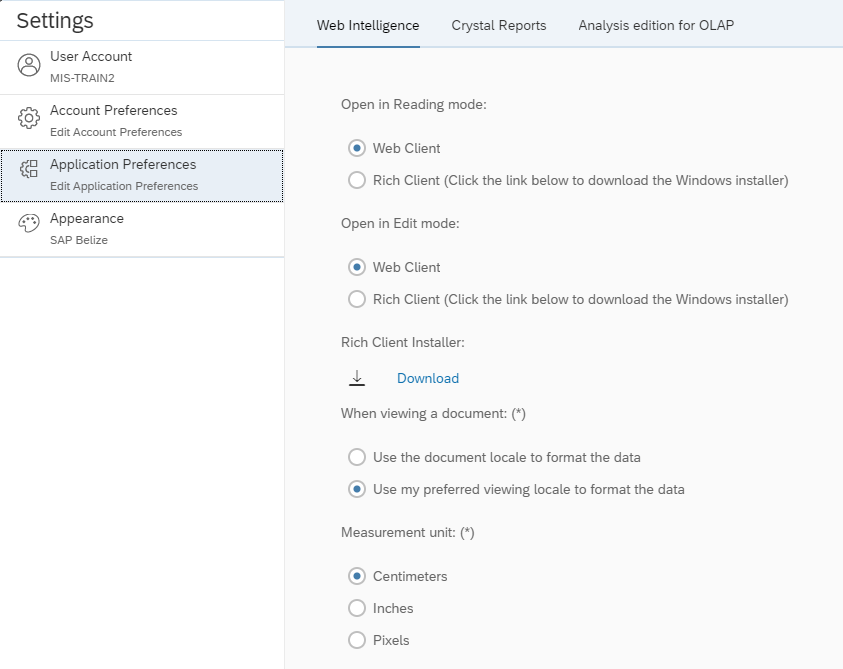
#### Status Bar

There is no **Status bar**. You can access these features from the **Display** and **Navigate** sections.

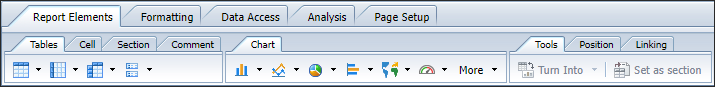


#### Application (Measurement setting)

Now access from Settings. From **BI** **Launch Pad,** click the circle with your initial in the upper-right corner, select **Settings** > **Application Preferences** to change the Measurement Unit setting.

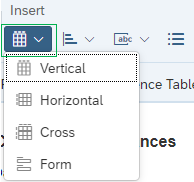


### Toolbar - Report Elements Tab



#### Tables Tab

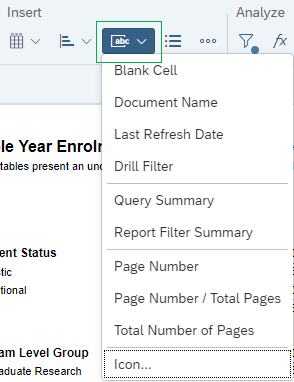
On toolbar - Insert > Insert Table > **Vertical/Horizontal/Cross/Form.**

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#### Cell Tab

On toolbar - Insert > **Insert Cell**.

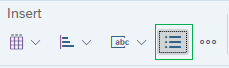
The separate Blank button in 4.2 is now included in the pre-defined options in the drop-down list, as shown below.



#### Section Tab

On toolbar - Insert > **Insert section**.

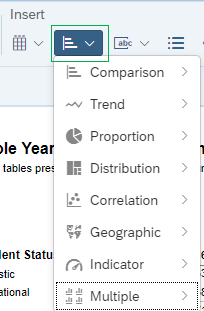
After clicking in the report to add a section, the **Define a New Section** window displays. This was called **Available Objects** in 4.2 but it functions the same way.



#### Chart Tab

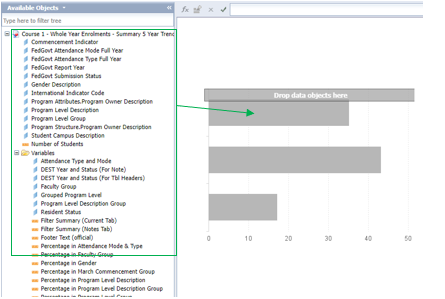
On toolbar - Insert > **Insert Chart**

The image below shows the location of Insert Chart on the 4.3 toolbar and the various chart options.

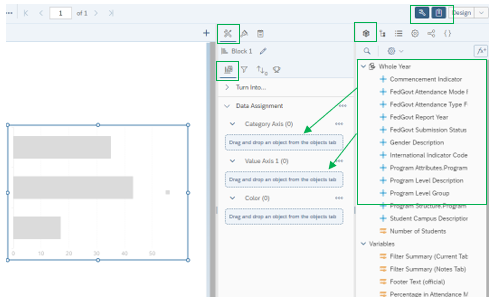


Once the chart is added to the report, the process of adding data has changed.

In 4.2, objects are dragged from the Available Objects sidebar and dropped directly onto the chart (or by right clicking and Assigning Data).



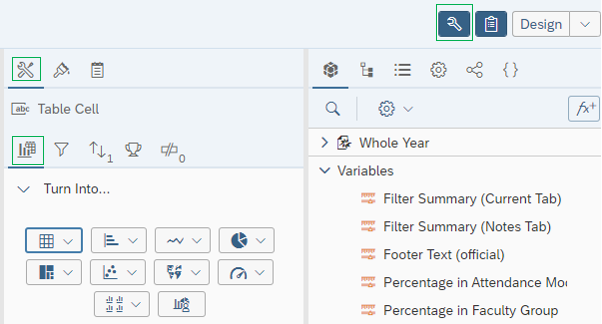
When a chart is added to a report in 4.3, the **Data/Format panel** opens, showing the Report Element Data and **Feeding panel.** The **Data Assignment section** expands and you can then drag and drop the desired objects (From the document dictionary in the **Main panel**) into the feeding panel or in the chart directly.



#### Tools Tab

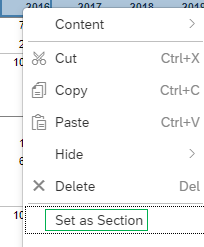
**Turn into**

On Data/format panel - Report element data > **Feeding panel**



**Set as section**

Right click on cell and select **Set as section**

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#### Position Tab

**Order**

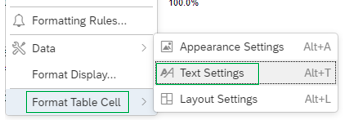
Right click on cell and select **Order**

Below image shows the contextual menu that displays when you right click on an element. Selecting **Order** displays the order options.

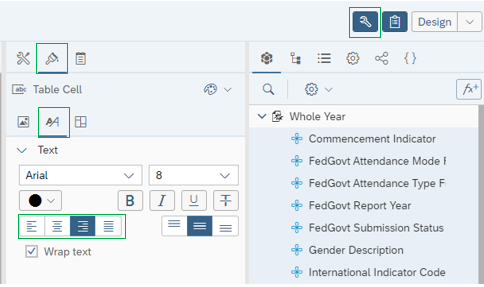


**Align**

Below image shows the contextual menu that displays when you right click on one or multi-select elements. Selecting **Format table cell** > Text settings displays the alignment options in the data/format panel on the right.

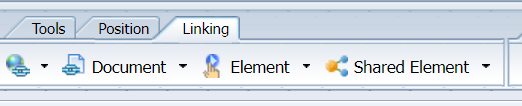


Alternatively, you can access from the Data/format panel > Show report element format > **Text settings**.



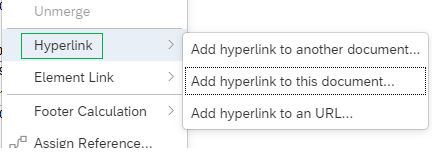
#### Linking Tab

Links will only function in Reading Mode, so you will need to revert from Design Mode to test.



**Hyperlink**

Right click on element and select **Hyperlink**

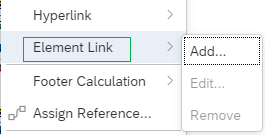


**Element**

Two options:

Right click on element and select **Element Link**

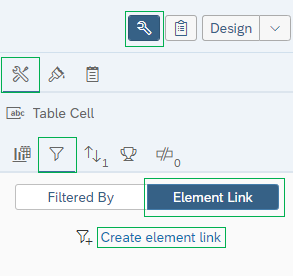
Below shows how to access **Element Link** and its sub-options from a contextual menu:



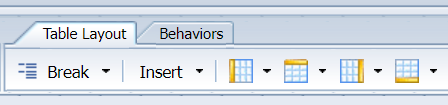
**OR**

Data/format panel > Show report element data > **Element Link**.

Below shows how to access **Element Link** from the Data/Format panel



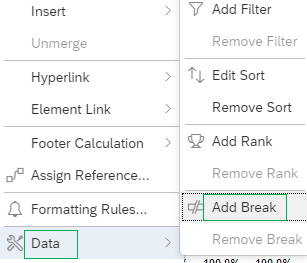
#### Table Layout Tab



**Break**

Two options:

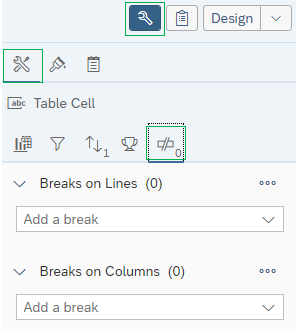
Right click on element and select Data > **Add Break**

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Or

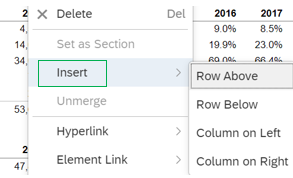
Data/format panel > Show report element data > **Break** panel.

Below shows how to access the **Break** panel from the Data/Format panel



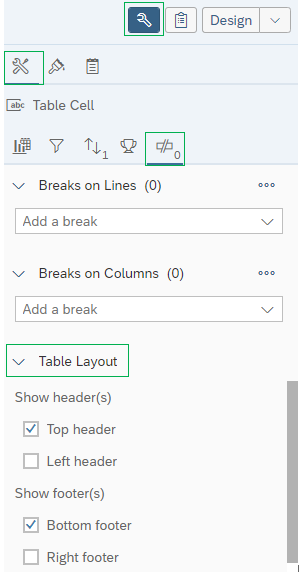
**Insert**

Right click on element and select **Insert**



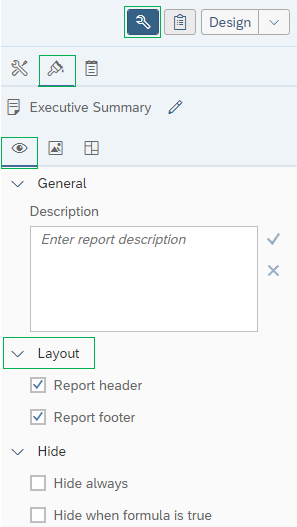
**Header/Footer**

Data/format panel > Show report element data > **Break** panel > Table Layout.

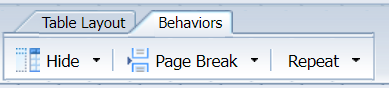


**Or**

Data/format panel > Show report element data > **Display settings**.



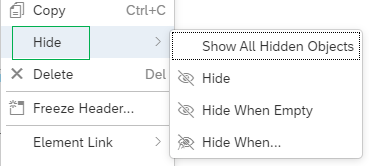
#### Behaviours/Cell Behaviours/Section Behaviours Tabs



**Hide (Table)**

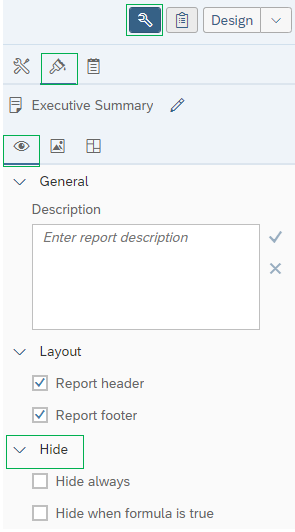
Two options:

Right click on table and select **Hide**



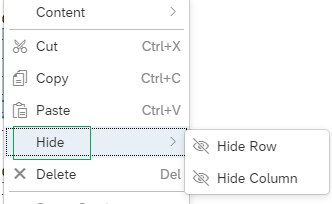
**Or**

Data/format panel > Show report element data > **Display** settings



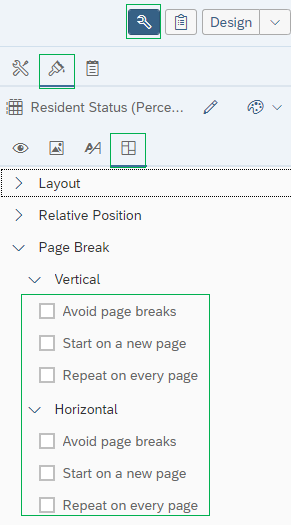
**Hide (Column)**

Right click on the cell and select **Hide**

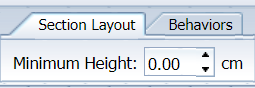


**Page Break/Repeat**

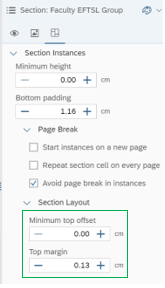
Select table > Data/format panel > Show report element data > **Layout** settings



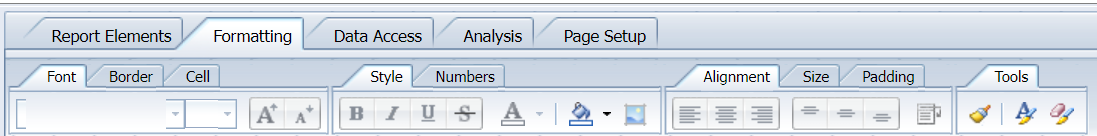
#### Section Layout Tab



Select section > Data/format panel > Show report element data > **Layout** settings

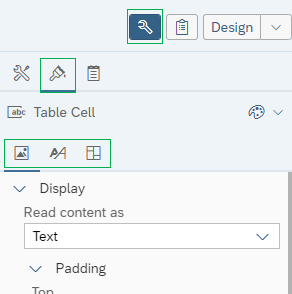


### Toolbar - Formatting Tab

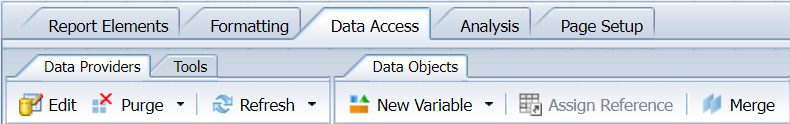


Select section > Data/format panel > **Show report element data** panel.

In the below example, the layout settings appear when a cell is selected. The sub-tabs and settings are different depending on the type of element selected (e.g., cell, table, section):



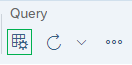
### Toolbar - Data Access Tab

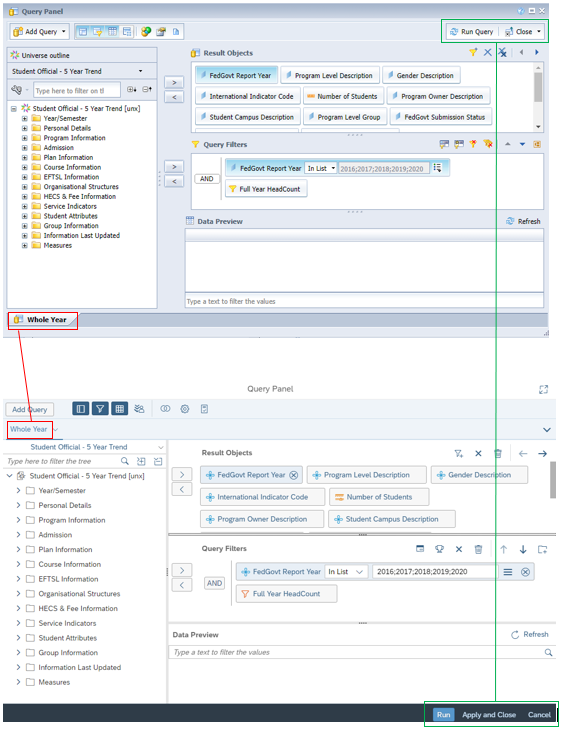


#### Data Providers Tab

**Edit**

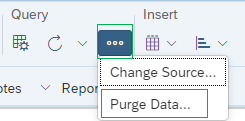
On toolbar – Query > **Edit**.



There are minor differences between the Query Panel screens. In 4.3, the buttons for Run, Apply Changes and Close (no longer under the Close drop-down list), and Cancel (replaces Revert Changes and Close option under the Close drop-down list) are at the bottom of the screen. If a report has multiple queries, they are listed near the top of the screen in 4.3.

**Purge**

On toolbar – Query > ellipsis **> Purge Data**.

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**Refresh**

On toolbar – Query > **Refresh**.



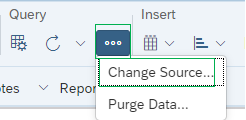
The drop-down list has options to refresh all the queries, or an Advanced refresh which allows for refresh of specific queries. The **Prompts** screen that displays has the same options but in a different interface.

A screenshot of a computer

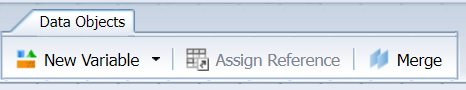
Description automatically generated with medium confidence

#### Tools Tab

On toolbar – Query > ellipsis **> Change Source**



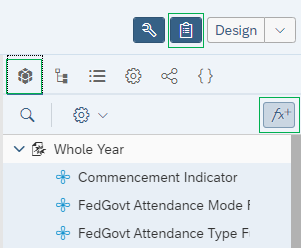
#### Data Objects Tab



**New Variable**

Two options:

Main Panel > Document Dictionary > ellipsis > **Add a new variable**

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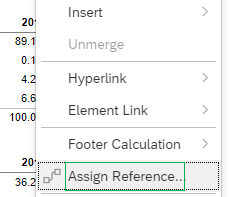
OR

**Create variable** from the formula bar.

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**Assign Reference**

Right-click on the element and select **Assign Reference**.

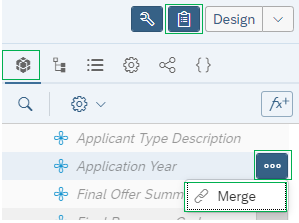


**Merge**

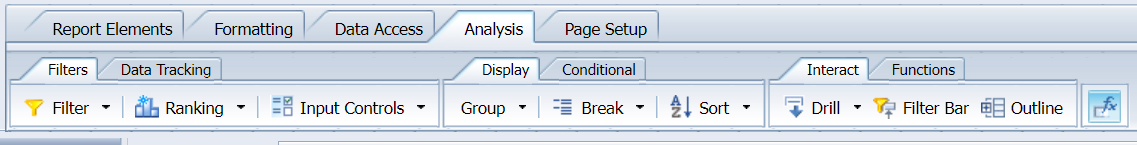
Main Panel > Document Dictionary

Select the dimensions being merged using Ctrl and select the ellipsis on the last dimension selected.

In the below example, the Application Year object under the QTAC query was second selected.

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### Toolbar - Analysis Tab



#### Filters Tab

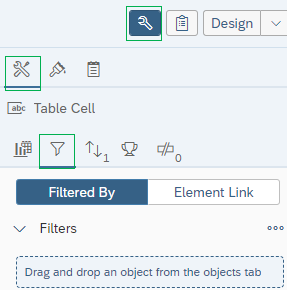
A picture containing text, font, software, line

Description automatically generated

**Filter**

Two options:

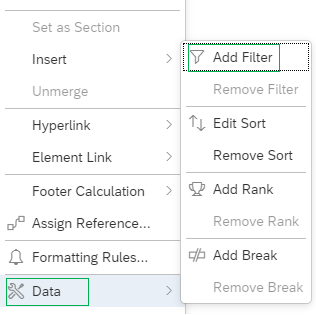
Data/Format Panel > Report element data > **Filter** panel

****

**Or**

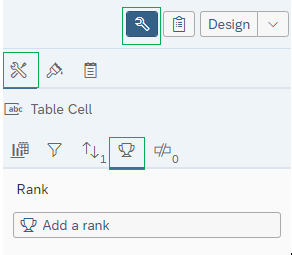
Right click on the element - Data > **Add Filter,** which opens the panel shown above.

A new filter is created in 4.3 by dragging the filter element from the Main Panel > Document dictionary onto the Filter panel then configuring the data in the window that displays.

****

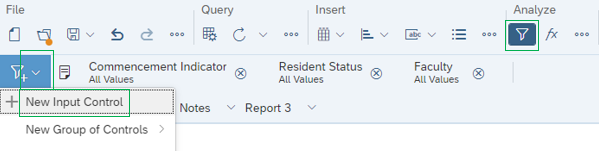
**Ranking**

Data/Format Panel > Report element data > **Ranking panel**

****

**Input Controls**

On the **Filter Bar.** Toggle the **Filter Bar** from the toolbar. Analyze **> Filter Bar**

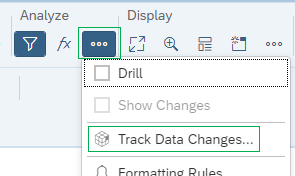
****

#### Data Tracking Tab

A screenshot of a computer

Description automatically generated with low confidence

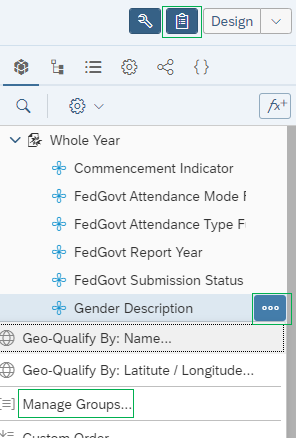
On toolbar – Analyze > ellipsis > **Track Data Changes** and **Show Changes**

****

#### Display Tab

**Group**

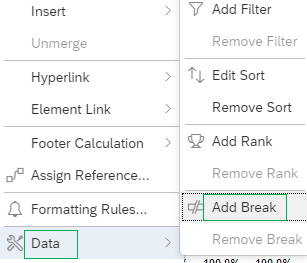
On Main panel – Document dictionary > ellipsis next to the object > **Manage Groups**

****

**Break**

Two options:

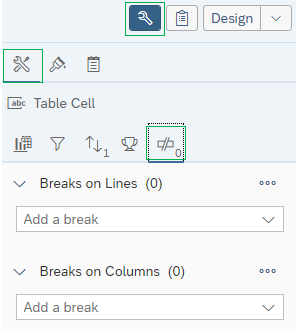
Right click on element and select Data > **Add Break**

****

**Or**

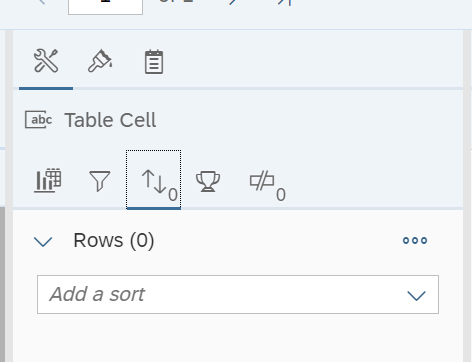
Data/format panel > Show report element data > **Break** panel.

Below shows how to access the **Break** panel from the Data/Format panel.

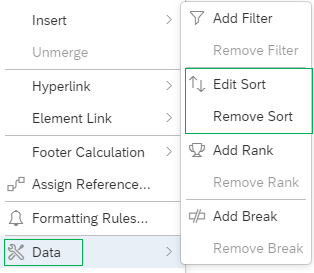


**Sort**

On Data/Formatting panel – Report element data > **Sort**

****

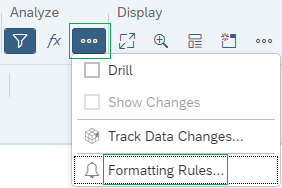
You can also sort from the contextual menu by right clicking in the cell and selecting Data> **Sort** which opens the panel above.



#### Conditional Tab

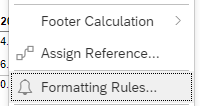
Two options:

Toolbar – Analyze > ellipses > **Formatting Rules**



**Or**

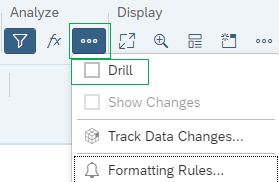
Right clicking in the cell and selecting Data> **Sort** which opens the panel above.



#### Interact Tab

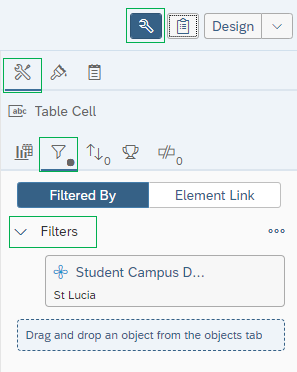
**Drill**

Toolbar – Analyze > **Drill**

****

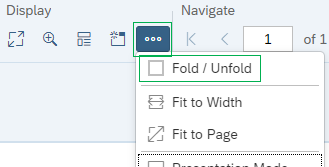
**Filter**

On Data/Formatting panel – Report element data > **Filter bar**

****

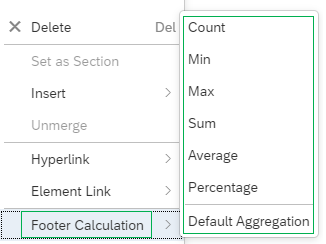
**Outline**

Toolbar – Display > **Fold/Unfold**

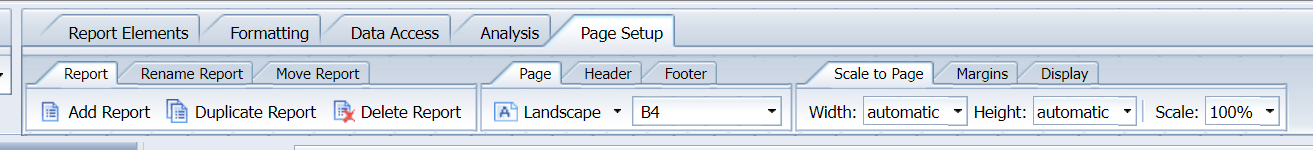
****

#### Functions Tab

Right click on the cell and select Footer calculation > desired option

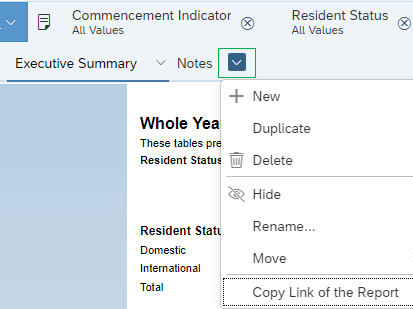


### Toolbar - Page Setup Tab



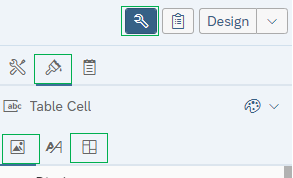
#### Report, Report Name, Move Report Tabs

In the drop-down list next to the report name you can access the various report.



#### Page, Header, Footer, Scale to Page, Margins, Display Tabs

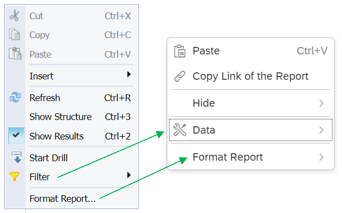
On Data/Formatting panel – Report element format > **Display settings > Appearance Setting** and **Layout settings** panels**.**



### Contextual Menus

Contextual menus are accessed by right-clicking on a report element. The four main contextual elements listed below.

#### Report Contextual Menu



The options have changed in 4.3

* **Cut, Copy, Paste** - Cut and copy options are not available from the menu in 4.3. Paste displays in the 4.3 menu if there is something on the clipboard that can be pasted.
* **Insert** - The elements to insert (e.g., table, report element, etc.) are accessed from the **Insert** section of the toolbar.
* **Refresh** - Available on the toolbar.
* **Show Structure / Show Results** - Available on Main Panel > **Show Report Structure;** since this is a panel in 4.3 now, the Show Results option is no longer needed.
* **Start Drill** - Available from the ellipsis in the Analyze section of the toolbar

Options on both menus:

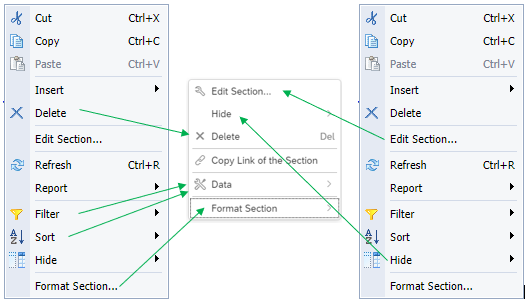
* **Filter - Data** in 4.3
* **Format Report – Data/Format** panel

New BO 4.3 option:

Copy Link of the Report – Copies URL of the document

Hide - Hides the report

#### Section Contextual Menu



The options have changed in 4.3

* **Cut, Copy, Paste** - Cut and copy options are not available from the menu in 4.3. Paste displays in the 4.3 menu if there is something on the clipboard that can be pasted.
* **Insert** - The elements to insert (e.g., table, report element, etc.) are accessed from the **Insert** section of the toolbar.
* **Refresh** - Available on the toolbar.
* **Report** - There are several options under this selection in BO 4.2:
  + **Show Structure / Show Results** - Available on Main Panel > **Show Report Structure;** since this is a panel in 4.3 now, the Show Results option is no longer needed..
* **Start Drill / Show Changes** - Available on the toolbar > Analyze > ellipsis.
* **Format Report** - Available on the Data/Format panel > Report Element Format Report.

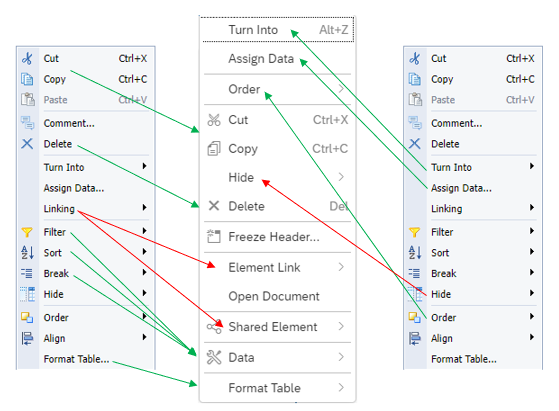
Options on both menus:

* **Edit Section**
* **Hide**
* **Delete**
* **Filter & Sort** - Filter and Sort are under **Data**
* **Format Section**

New option:

Copy Link of the Section

#### Table Contextual Menu



The options have changed in 4.3

* **Align** - Available on Data/Format panel > Report Element Format > Layout Settings.
* **Linking –** Split out to Element Link and Shared Element
* **Comment –** No longer available.

Options on both menus:

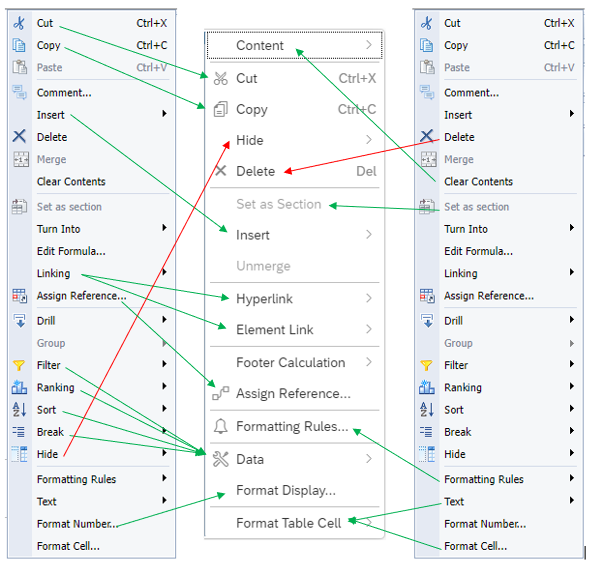
* **Cut, Copy - Paste**
* **Delete**
* **Turn Into**
* **Assign Data**
* **Filter, Sort & Break –** All are under **Data**
* **Hide**
* **Order**
* **Format Table**

New option:

Open Document – Copies URL of document

Freeze Header

#### Cell Contextual Menu



The options have changed in 4.3

**Turn Into** - Available on Data/Format panel > Report Element Data > Feeding panel

**Edit Formula** - To see the current formula for a cell, click the Formula Bar in the Analyze section of the toolbar. The bar displays above the report. To edit the formula, click **Display the formula editor** on the Formula bar.

**Drill** - Available from the ellipsis in the Analyze section of the toolbar.

**Group** - Available from the Main Panel > **Document dictionary**; click the ellipsis next to an object and select Manage Groups.

**Comment -**

Options on both menus:

**Cut, Copy - Paste**

**Comment –** No longer available.

**Insert** - The Count, Min, and Max options are now under **Footer Calculation**.

**Delete**

**Merge/Unmerge**

**Clear Contents -** Under **Content**.

**Set as Section**

**Linking -** This is now called Element Link.

**Assign Reference**

**Filter, Ranking, Sort & Break -** These functions are under **Data.**

**Hide**

**Formatting Rules**

**Format Number** - Under **Format Display**

**Format Cell/Text** - Under **Format Table Cell** and changes are made in the **Report element format** panel.

New BO 4.3 option:

Footer Calculation - The Sum, Count, Average, Min, Max and Percentage options has been expanded to include ‘Default Aggregation’.