

Adaptive Live | 2018

Leveraging OfficeConnect

Alice Coyne - Director, Product Management

Leveraging OfficeConnect

What will we be covering?

1. Multiple workbook Support
2. Workbook filters
3. Find and replace

What is the benefit for you?

- Understand how to take advantage of multiple workbooks
- Understand precedence and how to leverage filters for saving time in reports
- Understand use cases for Find / Replace

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Let's Take a Deeper Look!

Live Demo

Multiple workbooks

1. Up to three workbooks open at once (same credentials)
2. Copy and paste elements between workbooks
3. Launch using start menu or double-clicking on a file (not File / Open) to get another workbook

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Filtering

1. Worksheet filtering can be different by sheet
2. Workbook filtering is global to the entire workbook
3. Precedence rules apply:
 - *Cell overrides row*
 - *Row overrides column*
 - *Column overrides Worksheet Filter*
 - *Worksheet Filter overrides Workbook Filter*
 - *Workbook Filter overrides User Defaults*

Help article:

https://knowledge.adaptiveplanning.com/Reporting/OfficeConnect/0000Using_OfficeConnect/0210Default_Types_and_Precedence_Rules

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Find and Replace

1. Invoke from dialog, element tree or review pane
2. Scope: selected worksheet(s) or workbook
3. Navigate and find / replace one by one or all
4. Remove the element instead of replacing it.

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