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Business Objects Planning Resource Guide
SRC Functions

Business Objects Planning 10.8



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Manual abstract:

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expected to have completed official Business Objects Planning training. These documents should be seen as a resource to trained users, and as a guide to assist those preparing for official training. Document Structure and Scope This document is organized in the following manner: Chapter 1, "Overview of SRC Functions", provides an overview of the functions available in plans and reports, and explains the syntax conventions presented in this volume. Chapter 2, "Reporting Functions", details each function available in Business Objects Planning reports.

Syntax is explained and examples provided. Chapter 3, "Planning Functions", details each function available in Business Objects Planning plan workbooks. Syntax is explained and examples provided. This document is not all encompassing, nor is it specific to your Business Objects Planning system. For more information on Business Objects Planning features and capabilities, please refer to other Resource Guides and the electronic help files from the Help > Business Objects Planning Help menu within your Business Objects Planning system. For hands-on training either at your site or at our offices, please contact your Business Objects Planning representative. Terminology Assumptions Every implementation of Business Objects Planning utilizes terminology specific to the client's environment. The dimension names, time series names, data source names, etc., used in your system may be quite different than the names utilized in other Business Objects Planning systems. Business Objects Planning Resource Guide: SRC Functions 5 Introduction When discussing Business Objects Planning features and capabilities, certain terminology assumptions must be made.

For example, this document uses the term department to indicate the primary planning dimension. Your organization may use the terms cost center or project, however the general concepts are the same. The term Plan in the Resource Guides is a dynamic term used to represent the various planning functionalities of the Business Objects Planning system. The terms shown in your system will vary depending on the modules implemented and your chosen terminology. For example, where the Resource Guides discuss the Plan Administration menu area, your system may display Budget Administration if you have licensed BusinessObjects Budgeting, Forecast Administration if you have licensed BusinessObjects Forecasting, etc.



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Your system's time series and other columns may also be different than those used in the Resource Guides. For example, you might use the time series ACT instead of CYA, or the other column BGTPROJ instead of CYPROJ. You should apply your own system's terminology and structure as you read the discussion and examples in this document. 6 Business Objects Planning Resource Guide: SRC Functions Overview of SRC Functions Business Objects Planning provides a variety of special SRC functions that can be used within reports and plan workbooks. Most of these functions fall into one of the following three categories: Functions to query data from the Business Objects Planning database.

Functions to reference information held in Dimensions, Data Structures, Global Assumptions, Custom Tables, or Security. Functions to reference information about Process Control status. A handful of other functions do not fall into any of the above categories. Each exist for some special purpose, such as enabling formula concatenation in variable report Master Definition Rows or returning information about a report's current drill status. Please see the summary list of functions at the end of this chapter.

Classifying SRC Functions as Reporting or Planning SRC functions are enabled to work either in reports or in plan workbooks. Reporting functions are not supported for use in plan workbooks, and vice versa. In the areas where need overlaps for example, the need to reference information from the Dimensions there is a separate function for use in each area. Usually the functions take the same syntax but have a different name. The only difference is the area in which the function can be used.

This volume presents all of the SRC functions as either reporting functions or planning functions. If a function has a "twin" that can be used in the other area of the system, it is noted at the end of the function description. Presentation of Function Syntax Some SRC reporting and planning functions only have one available result. For example, the function SRCPROGDIR(), which returns the path of the system's Program directory, only has one possible result per system. The software does not need any further information to resolve the function. Other functions have the potential to return any number of possible values.

For these functions, certain parameters must be defined so that the system can identify which particular value you are looking for. The parameters for a particular function are known as the syntax for the function. Business Objects Planning Resource Guide: SRC Functions 7 1 Overview of SRC Functions Summary of SRC Functions The syntax for SRC functions is presented using the following formatting conventions: FunctionName("Parameter1", Parameter2, "Parameter3", Parameter4) Required Parameters If a parameter name is shownurns the long description of a stage, given the stage number Returns the due date of a stage, given the stage number Same as SRCSUM, but enables summing on a specific stage Displays stage status or filters information based on stage in variable reports SRCSTAGEDESC SRCSTAGEDUEDATE SRCSUMBYSTAGE SRCSTAGE N/A N/A N/A N/A 10 Business Objects Planning Resource Guide: SRC Functions Reporting Functions Business Objects Planning reports use special SRC functions to bring in data from the database, as well as to reference information from the Dimensions, Custom Tables, and other areas of the system. This chapter can be used as a reference for all SRC reporting functions.

Each function's syntax is explained and common usage issues are discussed. Examples are also provided for each function. This material can also be found in the Professional Edition Help files. The Business Objects Planning Function Wizard can be used in reports to assist you in constructing proper SRC function syntax. To use the wizard, place your cursor in a cell and select Plan > Wizards > Function Wizard, or right-click a cell and select Function Wizard. (The native Excel function wizard can also be used, but is not as robust regarding SRC functions and does not contain Help for the SRC functions.) The most commonly used functions in Business Objects Planning reports are SRCSUM, SRCNAME, and SRCSTATUS. Learning the use of those three functions will cover the majority of your reporting needs. All reporting functions are addressed in this chapter in alphabetical order. Using Criteria Statements in Reporting Functions Some SRC reporting functions take criteria statements.

These follow the standard Business Objects Planning criteria syntax, summarized below. For more details on Business Objects Planning criteria statement syntax, see Appendix A, "Business Objects Planning Criteria Conventions", in the General Concepts, Setup and Utilities Resource Guide.

Dimension=DimensionElement Example: Dept=17300 or Dimension.GroupingCode= 'GroupingElement' Example: Dept.Region= North' The operator, represented by the equals sign above, can be any of the operators shown in the following table: Business Objects Planning Resource Guide: SRC Functions 11 2 Reporting Functions Using Criteria Statements in Reporting Functions Operator Description = > < <> >= <= Equals Greater Than Less Than Not Equal to Greater Than or Equal to Less Than or Equal to The SQL LIKE and IN operators can also be used.

Quotation Marks If the dimension element or grouping element of the criteria statement is text, it must be placed in single quotation marks as follows:

Dept.VP= 'Simpson' If the element is numeric, then quotes are not required, as in Dept=171300 or Dept.Company=5. If the criteria statement is placed directly within an Business Objects Planning function, the entire criteria statement must be placed in double quotation marks, as follows:

=SRCSUM("CYA_YTD", "Dept.VP= 'Simpson'") Compound Criteria Compound criteria statements can be created by using AND or OR.

For example, the criteria statement Dept.Region= North' AND Dept.VP= 'Smith' would indicate departments that are assigned to the North region and Vice President Smith. Note that if you are creating compound statements where the Dimension.GroupingCode are the same, you must use OR to include both values. For example, you cannot use the statement Dept.Region= North' AND Dept.Region= 'South', because there are no departments that are assigned to both the North and South region. Instead, you must write the statement Dept.Region= North' OR Dept.

Region= 'South' to bring in departments from both regions. Note: The capitalization in the examples above is simply for clarity. AND and OR do not need to be capitalized in criteria statements. Cell References Instead of defining function parameters directly within SRC functions, you can place the parameters in other cells and then reference those cells in SRC functions.



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12 Business Objects Planning Resource Guide: SRC Functions Reporting Functions Using Criteria Statements in Reporting Functions 2 As an example, take the following function: =SRCSUM("CYA_YTD", "Acct.SummaryGroup= Sales") Instead of placing the parameters directly in the function, you could put CYA_YTD in cell B2, and Acct.SummaryGroup= Sales' in cell A3, and write the function as follows: =SRCSUM(B2,A3) The dollar sign character can also be used to "anchor" the row or column, allowing you to copy the function to multiple cells. For example: =SRCSUM(B\$2,\$A3). When you use cell references in SRC functions, note the following: Do not place the cell references in double quotation marks. Do not place the parameters in double quotation marks within the referenced cells.

However, the dimension element or grouping element must still be in single quotation marks if it is text, per the standard Business Objects Planning criteria syntax. The example below illustrates the use of quotation marks: Simple and Complex Criteria The concept of "simple" and "complex" criteria applies when criteria statements are used in reporting functions. If the Dimension.GroupingCode part of the criteria statement exactly matches the Row Definition of the report, the criteria is considered "simple". Otherwise, it is considered "complex".

For example, if the Row Definition of a report is simply Dept (with no grouping code), then a criteria of Dept=171300 is considered simple, whereas a criteria of Dept.VP= Simpson' is considered complex. Continuing the example, if you change the Row Definition of the report to be Dept and VP, then the situation is reversed the criteria Dept.VP= Simpson' is now simple and the criteria Dept=171300 is now complex. Both simple and complex criteria are valid, the difference is simply an issue of performance.

In general, simple criteria process more quickly than complex criteria. Whenever possible, you should use simple criteria to improve the performance of your report. Note that the second Row Definition can be used to help create simple criteria. If two Row Definitions are defined, then criteria statements that match either row definition are Business Objects Planning Resource Guide: SRC Functions 13 2 Reporting Functions Using Criteria Statements in Reporting Functions considered simple criteria. Two Row Definitions can also enable simple compound criteria. For example, the compound criteria statement Dept.VP= Simpson' and Dept.Region= North' can be considered simple criteria if the first Row Definition is Dept and VP and the second Row Definition is Dept and Region. Short Criteria In reports, Business Objects Planning supports a function-writing shortcut known as "short criteria". You can omit the dimension and grouping code from your criteria statement, and Business Objects Planning will automatically apply the dimension and grouping code defined as the first Row Definition.

For example, imagine you want to write a formula including the criteria statement Dept.VP= Simpson'. If the first Row Definition is defined as Dept and VP, then you could write the following formula: =SRCSUM("CYA_YTD", "Simpson") Please note the following: When using a grouping code with short criteria directly within the function, single quotation marks are not required use only the double quotation marks. If you place the short criteria in another cell and reference the cell in the function, no quotation marks are required. You cannot use short criteria with a compound criteria statement. If you wanted the SRCSUM criteria to be Dept.VP= Simpson' and Dept.Region= North', you would have to include the entire criteria statement. Short criteria applies only to the first Row Definition. If a second Row Definition is defined, the short criteria will continue to work with the first Row Definition but cannot be used with the second Row Definition.

14 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCALERT 2 SRCALERT Defines an alert condition. If the condition evaluates to true when alerts are processed, a user alert is created according to the function parameters. Syntax

SRCAAlert(Condition, "Title", "Description", DurationDays, "DistributionList", ActionItem, SendMail, TestValue, ConditionRed, ConditionYellow, ConditionGreen) Condition The alert condition to be evaluated. This must be an SRC or Excel formula that resolves to True or False. If it evaluates to True, a user alert will be generated.

Title Title that displays to the alert recipient. Description Long description that displays to the alert recipient. DurationDays Integer representing the number of days the alert will remain in the database until expiring. When the alert is generated, the duration is added to the current date/time to calculate an expiration date/time. DistributionList Users to be notified of the generated alert.

Inputs must be valid Business Objects Planning user/group names or email addresses. (If an email address is entered, the recipient will only see the alert if SendMail is set to True.) Separate multiple recipients with commas and place the entire list in quotation marks. ActionItem This parameter is currently unused and is reserved for future use. Any input in this parameter will be ignored. However, this parameter must still be delimited if you want to use any of the subsequent parameters (see examples). SendMail An optional parameter indicating whether a notification email will be sent to the users in the DistributionList. Indicate True to send email. The default is False. TestValue An optional parameter that indicates the value that is being evaluated in the condition.

This value will be displayed to the alert recipient. ConditionRed An optional parameter that contains a condition that must evaluate to True or False. If True, the alert is assigned the red severity indicator. Note that the color condition parameters are evaluated in order. If one resolves to True, the remaining parameters are ignored. If all color conditions evaluate to False, or if no inputs are made for the color conditions, then the alert is not assigned a severity indicator. Business Objects Planning Resource Guide: SRC Functions 15 2 Reporting Functions SRCALERT ConditionYellow An optional parameter that contains a condition that must evaluate to True or False. If True, and if ConditionRed is not True, the alert is assigned the yellow severity indicator. ConditionGreen An optional parameter that contains a condition that must evaluate to True or False. If True, and if ConditionRed and ConditionYellow are not true, the alert is assigned the green severity indicator.

Usage Notes SRCALERT is only available if Plan Dashboarding has been enabled in your system. If the alert condition is true, the SRCALERT function returns the defined Title.



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If the alert condition is false, SRCALERT returns the text False. The ActionItem parameter does not appear when using the Business Objects Planning Function Wizard. The wizard automatically delimits the parameter for you in the completed function as needed.

If you are using the Business Objects Planning Function Wizard to build the function, and are using the cell reference lookup in the Condition field, you must select items in a particular order. The easiest way to use the cell lookup is to select a cell, then click inside the cell lookup field, then repeat that process for as many cells as you plan to reference in the condition. Then return to the Business Objects Planning Function Wizard screen and add the necessary condition statements and operators. If you attempt to write the condition while selecting cells, or if you do not click inside the cell lookup field in between cell selections, then each new cell selection will overwrite the current contents. Group names may be indicated in the DistributionList, but keep in mind that if an alert is assigned to a group name, the alert will only appear in Enterprise Desktop if a user logs in with the group's user name and password (it will not display to the individual members of the group).

Similarly, if email delivery is enabled, the email will be sent to the email address defined for the group name. When user names are listed in the DistributionList, Business Objects Planning applies the email address for the user name as defined within the primary authentication system. See the Planning Enterprise Services Installation and Administration Guide for more details on the primary authentication system. If you are using the Business Objects Planning Function Wizard to build the function, note that you must place the Title and Description in quotation marks if inputting text (instead of using a cell reference). The wizard will not add the quotation marks for you within these two fields. Example =SRCALERT(OR(L8>0.05,L8<0),"Sales variance","YTD sales variance exceeds threshold",3,"smith, kjones",, FALSE, L8, L8<-.1,L8<0, L8>.05) 16 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCALERT 2 This example generates a user alert if the value in L8 is greater than .05 or less than 0.

The alert will be titled "Sales Variance" with a description of "YTD sales variance exceeds threshold". Note that these parameters must be in quotation marks. The alert will expire 3 days after the time of processing. The users who will be notified of the alert are smith and kjones. Note that this parameter must be in quotation marks. As noted above, the ActionItem parameter is ignored, but is delimited with commas. The alert will not be sent by email. The value in L8 is designated as the Test Value for display to alert recipients. The alert will be assigned a red severity rank if the value in L8 is less than -.1, a yellow severity rank if the value in L8 is less than 0 (but greater than -.

1), or a green severity rank if the value in L8 is greater than .05. Business Objects Planning Resource Guide: SRC Functions 17 2 Reporting Functions SRCDATADIR SRCDATADIR SRCDATADIR returns the path of the Business Objects Planning User directory. Syntax SRCDATADIR() This function does not take any parameters. The open and close parentheses must be included with the function.

Example =SRCDATADIR() returns N:\PROGRAM FILES\SRC SOFTWARE\USER if that is the location of the current User directory. 18 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCDBSUM 2 SRCDBSUM SRCDBSUM queries the report's defined data source and returns the sum of the requested data. It differs from the standard SRCSUM in that it ignores the report's current filters on the Settings Sheet (Report Filter and Supplemental Filter). Syntax SRCDBSUM("Column Dimension Name", "Criteria") Column Dimension Name This refers to the desired element within the Column Definition of the current report (as defined on the Orientation Sheet). The Column Definition is often Time Series, so typical entries for this parameter might be CYA_CUR, CYA_YTD, CYB5, etc.

If the Column Definition is other than Time Series (such as Dept) the column dimension code would be an element of that dimension. The _IN_ syntax may also be required to designate a time series. See Example 3. Criteria The criteria typically reflects the desired element within the Row Definition. The criteria is combined only with the user's Data Filter as defined in Security and ignores any filters established on the Settings Sheet. Criteria expressions use typical spreadsheet syntax or standard SQL syntax for defining the criteria. All parameters that are text (strings) must be in quotation marks if entered directly in the function. Examples Example 1: =SRCDBSUM("CYA_YTD","ACCT=500") returns the sum of all occurrences of account 500 for the CYA_YTD summary field, disregarding the current report filter. Short Criteria: If the first Row Definition is set to ACCT, the same formula can be shortened to read =SRCDBSUM("CYA_YTD",500). Note that 500 in this case does not need to be in quotation marks as it is a numeric parameter.

Cell References: A shorter and even more versatile form might be: =SRCSUM(D\$1,\$A1) where the specific column definition element is in cell D1 (CYA_YTD) and the row criteria is in cell A1 (ACCT=500). Example 2: When using a grouping code where the element is a string, the grouping code must be within single quotes as follows: =SRCDBSUM("CYA_YTD","ACCT.TYPE= SUPPLIES") Short Criteria: If the first Row Definition is set to ACCT and TYPE, then "short criteria" can be used. Note that in this case the grouping element requires only double quotation marks. The single quotation marks can be omitted. =SRCDBSUM("CYA_YTD","SUPPLIES") Business Objects Planning Resource Guide: SRC Functions 19 2 Reporting Functions SRCDBSUM Example 3: If the Column Definition is not Time Series, and there is more than one time series listed on the Orientation Sheet, then the first parameter of the SRCDBSUM function must also designate which time series to use. This is accomplished using the characters _IN_ as shown in the following examples: =SRCDBSUM("Simpson_IN_CYA5","Wages"), where the column definition is DEPT.VP =SRCDBSUM("West_IN_CYA_YTD","Acct>20000") where the column definition is DEPT.REGION If the report only queries data from one time series, the _IN_ syntax is not required. 20 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCDSSUM 2 SRCDSSUM SRCDSSUM queries the database and returns the sum of the requested data.

It differs from the standard SRCSUM function in that it allows you to query a different data source than the data source defined on the Orientation Sheet.



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It also ignores any filters defined on the Settings Sheet (Report Filter and Supplemental Filter). Syntax: SRCDSSUM("Column Name", "Criteria", "Data Source") Column Name This refers to the desired column within the data source table. The column name must be a time series, summary field or other column, so typical entries might be CYA_CUR, CYA_YTD, etc. Criteria The criteria expressions use standard SQL or typical spreadsheet syntax. The criteria is combined only with the user's Data Filter as defined in Security and ignores any filters established on the Settings Sheet. Data Source This represents the data source that SRCDSSUM will query. You can refer to the data source by number (0-9), or by its name in double quotation marks. All parameters that are text (strings) must be in quotation marks if entered directly in the function. Examples Example 1:

=SRCDSSUM("HRS_TOT", "DEPT=500", "Payroll") returns the value of the Total Hours for Department 500 found in the Payroll data source.

The same formula could also be written using the data source number. If the Payroll data source was number 2, the following formula would return the same result: =SRCDSSUM("HRS_TOT", "DEPT=500", 2) Example 2: The following example uses a more complex criteria. When using a grouping code where the element is a string, the grouping code must be within single quotes as follows: =SRCDSSUM("HRS_TOT", "JOB=1001 and DEPT.VP= Smith", "Payroll")

This would return the value of the Total Hours for Job Code 1001 for departments assigned to VP Smith, in the Payroll data source. Business Objects Planning Resource Guide: SRC Functions 21 2 Reporting Functions SRCEVAL SRCEVAL SRCEVAL is used in the Master Definition Row of variable reports to resolve a formula into a valid Business Objects Planning database column name. Syntax SRCEVAL() SRCEVAL can only be used in the Master Definition Row of variable reports. The parenthesis must contain a formula that will resolve to a proper column name. The Master Definition Row will then apply the column name instead of the formula when populating the variable section. Example SRCEVAL is most commonly used when you want the data in a column to change based on an outside variable. For example: =SRCEVAL(IF(something=x, "CYA_YTD", "CYB_YTD")) This causes the column in the variable report to populate with data from either CYA_YTD or CYB_YTD based on an outside variable.

22 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCGLRPT 2 SRCGLRPT This function allows you to reference information in the Global Assumptions from within a report. SRCGLRPT is particularly valuable when looking up a numeric code in a table. Note: To enable the use of SRCGLRPT, you must check the box on the report's Settings Sheet labeled Load Global Assumptions with Report. The Global Assumptions will not be loaded until the next time you open the report. Syntax SRCGLRPT("Sheetname", KeyItem, "OffsetNo", Range_lookup) Sheetname This refers to the desired sheet name in the Global Assumptions. KeyItem This refers to any value in column A of the designated sheet in the Global Assumptions. If KeyItem is text, the parameter must be placed in quotation marks. OffsetNo This can either be the offset number of columns (for example, 5) or a column title in row 1 (for example, "Rate") of the designated sheet in the Global Assumptions. The parameter must be in quotation marks if text is used. Quotation marks are not required for the offset number of columns.

Range_lookup Range_lookup is an optional parameter that should only be used when KeyItem is a number. Range_lookup is a logical value that specifies whether you want SRCGLRPT to find an exact match or an approximate match. If False or omitted, SRCGLRPT will find an exact match. If a value is not found at the location specified by the parameters above, the error value #N/A is returned. If True, an approximate match is returned.

In other words, if an exact match is not found, the next largest value that is less than the lookup value is returned. When using the True parameter for the range lookup, the items in the list you are referencing must be sorted in order to return an approximate match. All parameters that are text (strings) must be in quotation marks if entered directly in the function. Example =SRCGLRPT("Wages", 23, "Rate") returns the value of the rate for paycode 23 within the Wages global sheet. The same formula could also be written using the offset number of columns instead of the column title.

If the Rate information is listed in column 5, the following formula would return the same value: =SRCGLRPT("Wages", 23, 5). Business Objects Planning Resource Guide: SRC Functions 23 2 Reporting Functions SRCGLRPT Note: The SRC function SRCGL takes the same syntax as SRCGLRPT, but is used exclusively in plan workbooks and templates. 24 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCGRRPT 2 SRCGRRPT SRCGRRPT allows you to reference information from the Global Assumptions, given a direct cell reference, a row title (text), or a row number. Note: To enable the use of SRCGRRPT, you must check the box on the report's Settings Sheet labeled Load Global Assumptions with Report. The Global Assumptions will not be loaded until the next time you open the report. Syntax SRCGRRPT("SheetName", "CellAddrOrRow", "ColNum") SheetName This refers to the desired sheet name in the Global Assumptions. CellAddrOrRow There are three options for this parameter: 1. 2. 3. Enter the cell reference as text (in quotes).

If you choose this option, the third parameter of the function, ColNum, is not necessary. Enter a row title from column A. The title must be text, not numbers. Enter the row number. In this case, the parameter does not require quotation marks. ColNum If you chose one of the latter two options for CellAddrOrRow, your ColNum criteria must match it. You can either enter a column title from row 1, or the column number. If it is a text title, this parameter must be in quotes. If it is a column number, quotes should not be used. All parameters that are text (strings) must be in quotation marks if entered directly in the function.

Usage Notes SRCGRRPT cannot be used if the row "title" in column A is a number instead of a string. If column A holds numbers, the function SRCGLRPT should be used to enable dynamic references. Examples Example 1: Returning a Value Using Dynamic References The first example illustrates the recommended method for writing global reference formulas. If the Global Assumptions have been set up with unique column titles in row 1 and unique row titles in column A, you can use SRCGRRPT to reference this information dynamically, as follows: =SRCGRRPT("DeptStats", "Medical", "YTD") Business Objects Planning Resource Guide: SRC Functions 25 2 Reporting Functions SRCGRRPT This example accesses the global sheet DeptStats, finds the row entitled Medical and the column entitled YTD, and returns the value for that intersecting cell.



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This is the most sophisticated way to utilize the global reference function, and the easiest to use.

@@In that case you must use the SRCGLRPT function. @@@@Again, this is a much less dynamic method than Example 1.

@@@@@If omitted, the description of the dimension element is returned. @@@@In this example, EmpID is a non-validated dimension. @@@@The open and close parentheses must be included with the function.

Usage Notes The organization name in the Data Structures is defined on a per data source basis. SRCORG will return the value for the data source indicated on the Orientation Sheet of the report. Example =SRCORG() returns the name Portlandia Enterprises if that is the name defined in the Institution Name field on the General tab of the Data Structures. Business Objects Planning Resource Guide: SRC Functions 29 2 Reporting Functions SRCPERIOD SRCPERIOD SRCPERIOD can be used to return one of the following: The current period as defined by the Current Period utility. The description of the current period as defined on the General tab of the Data Structures. A description of a period other than the current period. Syntax SRCPERIOD(Column Number,Period Override) Both parameters are optional. If neither parameter is indicated, SRCPERIOD() returns the number of the current period. Column Number This refers to the Description columns on the General tab of the Data Structures. If a column number is indicated, SRCPERIOD returns the corresponding description for the current period.

Period Override This parameter can be used with the Column Number parameter to return a description for a period other than the current period. If a period number is indicated, SRCPERIOD returns the corresponding description for the designated period number. Usage Notes SRCPERIOD is most often used to display a description of the current period for use in headings. Current periods and period descriptions are defined on a per data source basis. SRCPERIOD will return the information for the data source indicated on the Orientation Sheet of the report. Examples Example 1: Returning the Current Period Value =SRCPERIOD() returns 6 if the current period is 6. Example 2: Returning a Description of the Current Period =SRCPERIOD(2) returns the description of the current period as defined in column 2 of the General tab of the Data Structures (for example, June). Example 3: Returning a Description of a Period Other Than the Current Period =SRCPERIOD(2,5) returns the description of period 5 as defined in column 2 of the General tab of the Data Structures (for example, May), even if the current period is period 6. 30 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCPROCESSINFO 2 SRCPROCESSINFO SRCPROCESSINFO returns information about the current status of a plan workbook. Note: This function is only available if Process Control has been enabled by your consultant.

Syntax: SRCPROCESSINFO(Dimension Code,"DataElement","StageOverride") Dimension Code This refers to a specific dimension element within the designated planning dimension. DataElement The following DataElements can be used to return various Process Control information for the indicated dimension element's plan workbook: Current Stage returns the name of the stage that the workbook is currently assigned to. StageOrdinal returns the number of the stage that the workbook is currently assigned to. Owner returns the name of the user the workbook is currently assigned to. You may use the optional StageOverride parameter when using this element.

LastSavedTime returns the date and time the workbook was last saved. LastSavedBy returns the name of the user who performed the last save. CheckedOutBy returns the name of the user who currently has the workbook checked out. In the case of distributed workbooks, it displays the name of the user who distributed the workbook. CheckedOutTime returns the date and time when the workbook was checked out.

StageOverride StageOverride is an optional parameter, used only when the DataElement is set to Owner, that enables you to return the name of the owner for any of the stages. Indicate the name of the stage for which you would like the name of the owner returned. All parameters that are text (strings) must be in quotation marks if entered directly in the function. Examples The following examples show the potential results for Department 60804, using various data elements: =SRCPROCESSINFO(60804,"CurrentStage") returns Mgr Review if that is the current stage of the workbook. Business Objects Planning Resource Guide: SRC Functions 31 2 Reporting Functions SRCPROCESSINFO =SRCPROCESSINFO(60804,"StageOrdinal") returns 2 if the workbook is currently in the 2nd defined Process Control stage. =SRCPROCESSINFO(60804,"Owner") returns Bradley if the assigned owner of the workbook at the current stage is Bradley. =SRCPROCESSINFO(60804,"Owner","Final") returns Simmons if the assigned owner of the stage named "Final" is Simmons. =SRCPROCESSINFO(60804,"LastSavedTime") returns 11/20/2001 11:05:18 AM if that is when the workbook was last saved. =SRCPROCESSINFO(60804,"LastSavedBy") returns Moore if Moore is the name of the user who last saved the workbook. =SRCPROCESSINFO(60804,"CheckedOutBy") returns Newton if Newton is the user the workbook is checked out to.

=SRCPROCESSINFO(60804,"CheckedOutTime") returns 11/21/2001 1:27:06 PM if that is when the workbook was checked out. 32 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCPROGDIR 2 SRCPROGDIR SRCPROGDIR returns the path of the Business Objects Planning Program directory. Syntax SRCPROGDIR() This function does not take any parameters. The open and close parentheses must be included with the function. Example =SRCPROGDIR() returns N:\PROGRAM FILES\SRC SOFTWARE\CORE if that is the location of the Program directory. Business Objects Planning Resource Guide: SRC Functions 33 2 Reporting Functions SRCSCENARIO SRCSCENARIO SRCSCENARIO returns the scenario description as defined in the General tab of the Data Structures. Syntax SRCSCENARIO() This function does not take any parameters. The open and close parentheses must be included with the function. Usage Notes The scenario description is defined on a per data source basis. SRCScenario will return the scenario description for the data source indicated on the Orientation Sheet of the report.

Example =SRCSCENARIO() returns 2005 Budget if that is the description defined in the Scenario Description field of the General tab of the Data Structures. 34 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCSTAGE 2 SRCSTAGE SRCSTAGE is not technically a function, it is a keyword that may be used in the Master Definition Row of variable length reports to bring in the name of a workbook's current stage.



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It may also be used in a variable section filter to bring in planning dimension elements assigned to a specific stage. This stage reporting feature is available in a variable report if all of the following are true: 1. 2.

3. The Row Definition is the planning dimension. The Column Definition is Time Series. No grouping codes are being used on the Orientation Sheet. Note: This reporting keyword is only available if Process Control has been enabled by your consultant.

Examples Example 1: Using SRCSTAGE in the Master Definition Row If SRCSTAGE is placed in the Master Definition Row and the planning dimension is Dept, that column would list the current stage of each department. Example 2: Using SRCSTAGE in a Variable Section Filter SRCSTAGE may also be used as a criteria in variable section filters to only bring in planning dimension elements currently assigned to a specific stage. For example, if the following criteria statement were defined as a variable section filter, that section would be limited to all departments that are currently assigned to the Supervisor stage.

SRCSTAGE= Supervisor' Business Objects Planning Resource Guide: SRC Functions 35 2 Reporting Functions SRCSTAGEDESC SRCSTAGEDESC SRCSTAGEDESC returns the long description of a stage defined in Stage Setup. Note: This function is only available if Process Control has been enabled by your consultant. Syntax SRCSTAGEDESC("Stage Name") The Stage Name is a name defined in Process Control > Stage Setup. Example =SRCSTAGEDESC("Mgr Review") returns Manager Review if that is the long description of the stage named Mgr Review. 36 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCSTAGEDUEDATE 2 SRCSTAGEDUEDATE SRCSTAGEDUEDATE returns the due date established for any stage given its ordinal value. Note: This function is only available if Process Control has been enabled by your consultant. Syntax SRCSTAGEDUEDATE(Stage Number) Stage Number is based on the order of the stages established in Process Control > Stage Setup.

It is a value from 1 to the number of the last stage your system has defined. Example =SRCSTAGEDUEDATE(2) returns November 20, 2005 if that is the due date of the second stage. Business Objects Planning Resource Guide: SRC Functions 37 2 Reporting Functions SRCSTAGENAME SRCSTAGENAME SRCSTAGENAME returns the name of any stage given its ordinal value. Note: This function is only available if Process Control has been enabled by your consultant. Syntax SRCSTAGENAME(Stage Number) Stage Number is based on the order of the stages established in Process Control > Stage Setup. It is a value from 1 to the number of the last stage your system has defined. Example: =SRCSTAGENAME(2) returns Mgr Review if that is the name of the second stage. 38 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCSTAGEORDER 2 SRCSTAGEORDER SRCSTAGEORDER returns the number of any stage given its name. Note: This function is only available if Process Control has been enabled by your consultant. Syntax SRCSTAGEORDER("Stage Name") The Stage Name is a name defined in Process Control > Stage Setup.

Example =SRCSTAGEORDER("Mgr Review") returns 2, if that is the number of the stage named Mgr Review. Business Objects Planning Resource Guide: SRC Functions 39 2 Reporting Functions SRCSTATUS SRCSTATUS SRCSTATUS returns current report settings information. It is typically used to create dynamic report headings that change automatically according to the set of data queried. Syntax SRCSTATUS(Status Code) The Status Code is a number from 1 to 7, or empty parentheses. If the report is prepared sequentially, SRCSTATUS is driven by the sequential settings.

Otherwise, the first Report Filter row drives SRCSTATUS (except for codes 5 - 7, which are driven by your drill choices). Code 1 returns Sequential or Nonsequential. Code 2 returns the current dimension name. Code 3 returns the current group name. Code 4 returns the current element.

Code 5 returns the current Report Drill filter. Code 6 returns the cumulative Report Drill direction (i.e., rollup or hierarchy levels). Code 7 returns the specific Report Drill element. Code () empty parentheses returns the concatenation of dimension name, group name, and current element in the following form: dimension - group - element. Note that status codes 5 - 7 only apply to Report Drills, not Detail Drills. Example Example 1: Returning the Settings Sheet Filter =SRCSTATUS() returns DEPT - VP - SIMPSON if the Report Filter is Dept.VP= 'Simpson'. Example 2: Creating a Dynamic Header SRCSTATUS is most frequently used to create dynamic headers for reports.

It is often used in a compound, if/then-type format to cover a variety of report situations. For example, when creating a report using the New Report Wizard, the following SRCSTATUS formula is created: =IF(SRCSTATUS(2)="ALL","Consolidated",IF(SRCSTATUS(3)="", SRCSTATUS(4)&"-&SRCNAME("DEPT",SRCSTATUS(4)), UPPER(SRCSTATUS(3)&":"&SRCSTATUS(4)))) This formula will dynamically return the appropriate header for any Sequential Setting or any Report Filter. It will not return Report Drill settings (the wizard places that formula on a separate line). 40 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCSUM 2 SRCSUM SRCSUM queries the report's defined data source and returns the sum of the requested data. Syntax: SRCSUM("Column Dimension Code","Criteria") Column Dimension Code This refers to the desired element within the Column Definition of the current report (as defined on the Orientation Sheet). The Column Definition is often Time Series, so typical entries for this parameter might be CYA_CUR, CYA_YTD, CYB5, etc. If the Column Definition is other than Time Series (such as Dept) the column dimension code would be an element of that dimension. The _IN_ syntax may also be required to designate a time series. See Example 4. Criteria The criteria typically reflects the desired element within the Row Definition.

The criteria is combined with any filter that has been established on the Settings Sheet and is limited by the user's Data Filter defined in Security. Criteria expressions use standard SQL or typical spreadsheet syntax and may be as complex as required. All parameters that are text (strings) must be in quotation marks if entered directly in the function. Usage Notes Due to the special layout rules of variable reports, SRCSUM formulas in variable reports cannot contain cell references to cells above row 11. Examples Example 1: Basic SRCSUM Formula =SRCSUM("CYB1","ACCT=200001") returns the sum of all occurrences of Account 200001 for Current Year Budget period 1.

Example 2: Short Criteria and Cell References =SRCSUM("CYA_YTD","ACCT=500") returns the sum of all occurrences of Account 500 for the CYA time series for the year-to-date period.



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Short Criteria: If the Row Definition is set to ACCT, the same formula can be shortened to read =SRCSUM("CYA_YTD",500). Cell References: A shorter and even more versatile form might be =SRCSUM(D\$1,\$A1) where the specific column definition element is in cell D1 (CYA_YTD) and the row criteria is in cell A1 (ACCT=500). Example 3: Grouping Code When using a grouping column where the element is a string, the grouping element must be within single quotes as follows: Business Objects Planning Resource Guide: SRC Functions 41 2 Reporting Functions SRCSUM =SRCSUM("CYA_YTD","ACCT.TYPE= SUPPLIES") Example 4: Column Definition Other than Time Series If the Column Definition is not Time Series, and there is more than one time series listed on the Orientation Sheet, then the first parameter of the SRCSUM function must also indicate which time series to use.

This is accomplished using the characters _IN_ as shown in the following examples: =SRCSUM("Simpson_IN_CYA5","Wages"), where the column definition is DEPT.VP =SRCSUM("West_IN_CYA_YTD","Acct>20000") where the column definition is DEPT.REGION If the report only draws data from one time series, the _IN_ syntax is not required. 42 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCSUMBYSTAGE 2 SRCSUMBYSTAGE SRCSUMBYSTAGE provides the ability to prepare reports by Process Control stage, for example, to differentiate between approved and pending plan workbooks. This function is identical in use to SRCSUM except that it has a third parameter that allows you to sum on a specific stage. Note: This function is only available if Process Control has been enabled by your consultant. Syntax SRCSUMBYSTAGE("Column Dimension Code","Criteria","Stage Name") Column Dimension Code This refers to the desired element within the Column Definition of the current report (as defined on the Orientation Sheet). Column dimension names often represent a time series period, so typical entries might be CYA_YTD, CYB5, etc. If the Column Definition is other than Time Series (such as Dept) the column dimension code would be an element of that dimension. Criteria The criteria typically reflects the desired element within the Row Definition.

The criteria is combined with any filter that has been established on the Settings Sheet and is limited by the user's Data Filter defined in the Security module. Criteria expressions use typical spreadsheet syntax or standard SQL syntax for defining the criteria. Stage Name This parameter allows you to sum on all plan workbooks within that particular stage. Use the Stage Name defined in the Stage Setup module. All parameters that are text (strings) must be in quotation marks if entered directly in the function. Example =SRCSUMBYSTAGE("CYB_YTD","ACCT.TYPE= Supplies","Mgr Review") returns the current year budget year-to-date sum for Supply accounts, limited to plan workbooks in the stage named Mgr Review. Business Objects Planning Resource Guide: SRC Functions 43 2 Reporting Functions SRCTABLE SRCTABLE SRCTABLE allows you to reference information in the Custom Tables. Syntax SRCTABLE ("Sheetname","KeyItem","OffsetNo","Range_lookup) Sheetname This refers to the desired sheetname in the Custom Tables. KeyItem This refers to any value in column A of the designated sheet.

If KeyItem is a number, the parameter does not require quotation marks. OffsetNo This can either be the offset number of columns (for example, 5) or a column title in row 1 (for example, "Rate"). This parameter must be in quotation marks if text is used instead of the offset number. Range_lookup Range_lookup is an optional parameter that should only be used when KeyItem is a number. Range_lookup is a logical value that specifies whether you want SRCTABLE to find an exact match or an approximate match.

If False or omitted, SRCTABLE will find an exact match. If a value is not found at the location specified by the parameters above, the error value #N/A is returned. If True, an approximate match is returned. In other words, if an exact match is not found, the next largest value that is less than the lookup value is returned. When using the True parameter for the range lookup, the items in the list you are referencing must be sorted in order to return an approximate match.

All parameters that are text (strings) must be in quotation marks if entered directly in the function. Example =SRCTABLE ("VP","Smith","LongDesc") returns the value in the intersection of the row labeled Smith and the column labeled LongDesc in the Custom Tables sheet named VP. Note: The SRC function SRCTABLEBGT takes the same syntax as SRCTABLE, but is used exclusively in plan workbooks and templates. 44 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCUSER 2 SRCUSER SRCUSER returns the first name, last name, or user name defined for a specific user in Security. Syntax SRCUSER("Name Part","Login Name") SRCUSER has two optional parameters. If neither parameter is used, SRCUSER() returns the login name for the currently logged in user. Name Part Specify either First or Last to return a user's first name or last name. Login Name This refers to a user name defined in Business Objects Planning Security. The Login Name parameter can be used to return the First or Last name of a specific user. If this parameter is omitted, then SRCUSER returns the name of the currently logged in user.

All parameters that are text (strings) must be in quotation marks if entered directly in the function. Examples The following examples demonstrate how to return specific details based on the parameters supplied: Example 1: Returning the Login Name for the Current User =SRCUSER() returns the login name for the currently logged in user (for example, JSmith). Example 2: Returning the First Name of the Current User =SRCUSER("First") returns the first name of the currently logged in user (for example, James). Example 3: Returning the Last Name of the Current User =SRCUSER("Last") returns the last name of the currently logged in user (for example, Smith). Example 4: Returning the First Name of a Specific User =SRCUSER("First","DEdwards") returns the first name of the specified Business Objects Planning user (for example, Dave). Business Objects Planning Resource Guide: SRC Functions 45 2 Reporting Functions SRCUSEREMAIL SRCUSEREMAIL SRCUSEREMAIL returns the email address defined for a specific user in Security. In addition to reports, SRCUSEREMAIL can also be used in Distributed Reporting Settings and Distributed Workbook Settings to enable looking up users' email addresses for workbook distribution. Syntax SRCUSEREMAIL("User Name") SRCUSEREMAIL has one optional parameter.



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If no User Name is indicated, SRCUSEREMAIL() returns the email address for the currently logged in user. If a User Name as defined in Security is indicated, SRCUSEREMAIL returns the email address for that user.

All parameters that are text (strings) must be in quotation marks if entered directly in the function. Examples Example 1: Returning the Email Address for a Specific User =SRCUSEREMAIL("DThomas") returns the email address for the user DThomas. Example 2: Returning the Email Address for the Current User =SRCUSEREMAIL() returns the email address for the currently logged in user. 46 Business Objects Planning Resource Guide: SRC Functions Reporting Functions SRCVAL 2 SRCVAL SRCVAL returns a single record from the report's defined data source, given a particular time series period or other column and a criteria. Syntax SRCVAL("Time Series","Criteria") Time Series This refers to a time series period or other column within the data source defined on the report's Orientation Sheet.

Criteria Any valid Business Objects Planning criteria statement can be used, as long as it equates to a single record in the data source. All parameters that are text (strings) must be in quotation marks if entered directly in the function. Example =SRCVAL("CYPProj","ACCT=101 AND DEPT=60003") returns the Current Year Projected amount for Account 101 and Department 60003. Business Objects Planning Resource Guide: SRC Functions 47 2 Reporting Functions SRCVAL 48 Business Objects Planning Resource Guide: SRC Functions Planning Functions Templates and plan workbooks use special SRC functions to bring in information from the Global Assumptions, Dimensions, Custom Tables, and other areas of the system. This chapter can be used as a reference for all SRC planning functions.

Each function's syntax is explained and common usage issues are discussed. Examples are also provided for each function. This material can also be found in the Professional Edition Help files. All functions are addressed in this chapter in alphabetical order. Business Objects Planning Resource Guide: SRC Functions 49 3 Planning Functions SRCDIMNAME SRCDIMNAME SRCDIMNAME returns the description of a dimension element, grouping element, or time series. Syntax SRCDIMNAME("Dimension Name",Dimension Element,"Group Name") Dimension Name This represents a dimension that has been defined in your system, such as Dept or Acct. SRCDIMNAME can also return a time series description; in this case the term Time should be used. Dimension Element This is the specific item within the dimension, such as department number 6000. If SRCDIMNAME is returning a time series description, the defined time series code should be used (for example: CYB). Note that SRCDIMNAME cannot be used with individual time series periods or other columns.

Group name This optional parameter allows you to indicate a grouping code, in order to return the grouping element associated with the dimension element.

If omitted, the description of the dimension element is returned. All parameters that are text (strings) must be in quotation marks if entered directly in the function. Examples Example 1: Returning the Description for a Dimension Element =SRCDIMNAME("ACCT",100) returns the description of account 100. Example 2: Returning a Grouping Code for a Dimension Element =SRCDIMNAME("ACCT",100,"TYPE") returns the description from the Type group for account 100 (for example: Benefits). Example 3: Returning a Description Using a Cell Reference =SRCDIMNAME("Acct",\$A12) returns the description of the account referenced in cell A12. Example 4: Returning a Time Series Description =SRCDIMNAME("Time","CYB") returns the description of the time series CYB (for example: Current Year Budget). Note that in this case the Dimension Element parameter is text, and therefore takes quotation marks. 50 Business Objects Planning Resource Guide: SRC Functions Planning Functions SRCGL 3 SRCGL SRCGL allows you to reference information in the Global Assumptions. This function should be used when the information in the Globals is organized by numeric codes (rather than by text titles see SRCGR).

The legacy version of this function is SRCGLBLOOKUP. It takes exactly the same syntax. Syntax SRCGL("Sheetname",KeyItem,"OffsetNo",Range_lookup) Sheetname This refers to the desired sheetname in the Global Assumptions. KeyItem This refers to any value in column A of the designated sheet in the Global Assumptions. If KeyItem is text, it should be placed in quotation marks.

OffsetNo This can either be the offset number of columns (for example, 5) or a column title in row 1 (for example, "Rate"). If text is used instead of the offset number of columns, the text must be placed in quotes. Range_lookup Range_lookup is an optional parameter that should only be used when KeyItem is a number. Range_lookup is a logical value that specifies whether you want SRCGL to find an exact match or an approximate match. If False or omitted, SRCGL will find an exact match.

If a value is not found at the location specified by the parameters above, the error value #N/A is returned. If True, an approximate match is returned. In other words, if an exact match is not found, the next largest value that is less than the lookup value is returned. When using the True parameter for the range lookup, the items in the list you are referencing must be sorted in order to return an approximate match. All parameters that are text (strings) must be in quotation marks if entered directly in the function. Examples =SRCGL("Wages",23,"Rate") returns the value of the rate for paycode 23 within the Wages global sheet. The same formula could also be written using the offset number of columns instead of the column title. If the Rate information is listed in column 5, the following formula would return the same value: =SRCGL("Wages",23,5). Business Objects Planning Resource Guide: SRC Functions 51 3 Planning Functions SRCGL Note: The SRC function SRCGLRPT takes the same syntax as SRCGL, but is used exclusively in reports. 52 Business Objects Planning Resource Guide: SRC Functions Planning Functions SRCGR 3 SRCGR This function allows you to reference information from the Global Assumptions, given a direct cell reference, a row title (text), or a row number.

If the information to be referenced is organized by numeric codes, you should use the SRCGL function instead. The legacy version of this function is SRCGLBREF. It takes exactly the same syntax. Syntax SRCGR("SheetName","CellAddrOrRow","ColNum") SheetName This refers to the desired sheet name in the Global Assumptions. CellAddrOrRow There are three options for this parameter: 1. 2. 3. Enter the cell reference as a label (in quotes).



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