

BI360 White Paper: Hyperlinking Sheets

Purpose

This white paper discusses how to add a hyperlink to link a dimension (or other field) between different sheets in a workbook.

Hyperlink Formula

The HYPERLINK, *HYPERLINK (link_location,friendly_name)*, function has two components:

1. *Link_location*: is the location to be directed to, e.g. a cell within the worksheet or path to a specific file.
2. *Friendly_Name*: is an optional field which is used to determine how the link is displayed within the workbook. If this parameter is omitted, then the actual link appears in the cell instead of a friendly name.

For example, to link to an Excel file called *Training* which is saved in *My Documents* folder, the formula, with a friendly hyperlink containing the friendly name “training”, would be as follows:

```
=HYPERLINK("C:\Documents and Settings\Username\My Documents\Training.xlsx","Training")
```

Setting up a Dynamic Hyperlink Formula Between Tabs

The following will be based on a BI360 report saved as “Linking.xlsx”. This template will allow a user to input budget values for each account on *Sheet 1* and enable users to click on the account which is linked to *Sheet2*, which contains comparative information. *Sheet1* of this report is contains four columns, which is shown in the screenshot below:

1. *Column A*: contains the account number for a group of accounts based on an expanding group in row four. Note that this column will eventually be hidden.
2. *Column B*: will contain the hyperlink. The goal will be to show the account number as a friendly name, so the formula will reference the account number in the adjacent cell in Column A. The formula in cell B4 is as follows: =HYPERLINK("[Linking.xlsx]Sheet2!A"&MATCH(A4,Sheet2!A:A,0),A4).
3. *Column C*: contains the account description
4. *Column D*: this will be reserved for inputting values.

	A	B	C	D
1				
2				
3	Account	Hyperlink	Description	Input
4	[Account]	#N/A	[Description]	
5				

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Sheet2 of the report contains three columns:

1. *Column A*: contains the account number. This is the location where the hyperlink from the first tab will go once clicked, for the respective account chosen.
2. *Column B*: comprises an amount (for reference only).
3. *Column C*: includes a description (for reference only).

	A	B	C
1	Reference		
2			
3	Account	Amount	Description
4	4000	100,000.00	Test 1
5	4010	200,000.00	Test 2
6	4100	300,000.00	Test 3
7	4200	400,000.00	Test 4
8	4300	500,000.00	Test 5
9			

Diagnosing the Formula

Once the two tabs have been populated with the accounts and the report has been executed, then a link will be available. The link, when clicked, will take the user from *Sheet1* to *Sheet2* for the respective account that was clicked on in *Sheet1*. The formula works due to MATCH function within the HYPERLINK function:

=HYPERLINK("[Linking.xlsx]Sheet2!A"&MATCH(A4,Sheet2!A:A,0),A4)

	A	B	C	D
1				
2				
3	Account	Hyperlink	Description	Input
4	4000	4000	Sales	
5	4010	4010	Freight Revenue	
6	4100	4100	Sales Discounts	
7	4200	4200	Sales Returns & Allowances	
8	4300	4300	Restocking Fee Revenue	
9				
10				
11				

[hyperlink.xlsx]Sheet2!A8 - Click once to follow. Click and hold to select this cell.

The MATCH portion of the formula, MATCH(A4,Sheet2!A:A,0), matches exactly what is found in cell A4 on *Sheet1*, to what is found in *Sheet 2* in Column A. Once a match is found then the formula will return the row number that is found in *Sheet 2*. In this example it would return "4" since account 4000 is on *Sheet 2*, Row 4.

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The HYPERLINK formula used in conjunction with the MATCH Formula solves the dilemma. The MATCH formula makes the hyperlink dynamic so it will update for each unique account.

```
=HYPERLINK("[Linking.xlsx]Sheet2!A"&MATCH(A4,Sheet2!A:A,0),A4)
```

The last portion of the formula is to reference the friendly name. Cell A4 is used so that it will show the account number as the friendly name in the hyperlink. As an example, column Column A can be hidden on *Sheet 1* and then column B can show the account number with the hyperlink.

	B	C	D
1	Input		
2			
3	<u>Account</u>	<u>Description</u>	<u>Input</u>
4	4000	Sales	
5	4010	Freight Revenue	
6	4100	Sales Discounts	
7	4200	Sales Returns & Allowances	
8	4300	Restocking Fee Revenue	
9			
10			