Using the Design Panel to Analyze and Format Data

Important Points about Using the Design Panel

- The query or queries embedded in an Excel workbook must be refreshed before anything will display in the Design Panel, otherwise the sections will be empty.
- The Analysis Design Panel helps you to create new views of the data provided from the data source(s) by analyzing and formatting the data in various ways.
- The Design Panel may be displayed or hidden at your preference and displays on the right side of the workbook.
- The size or position of the panel may be modified in Microsoft Excel and those changes remain while you are in the workbook, even if you close the Analysis tab or hide the Design Panel.
- Sections within the Design Panel provide drag and drop functionality, as well as right mouse click functionality to move columns or rows in or out of a workbook for filtering, adding drill-down, swapping the entire view of the workbook, etc.
- Tabs across the bottom provide different functions. The Analysis tab at the bottom will be the primary tab used by most at Duke.
Using the Design Panel (cont.)

- When the Design Panel is displayed, there are additional options available under the Display button to add sections and perform additional formatting around Properties and Technical Names within the Design Panel.

- The steps in this section of the guide are for general navigation around using the Analysis Design Panel and specific functions are detailed in the relevant “Analyzing and Formatting” topics later in this guide.
Display and Hide the Design Panel

1. To display the Design Panel, **click in a cell** within the crosstab to select the query and click on the **Drop-down** for the **Display** button located on the toolbar under the Analysis tab.

2. Click on **Display Design Panel** to open an Analysis panel on the right side of the Excel workbook (the other options for this button will NOT display if chosen until the Display Design Panel is selected first).

3. Review the **Analysis** Design Panel that is now displayed by default on the right side of the screen (if the sections are empty, remember to refresh the workbook if just opened).

4. To hide the Design Panel, use the **Close** button in the panel or repeat the above steps and choose **Hide Design Panel**.
Move or Size the Design Panel within Microsoft Excel

1. To change the size of the window to your preference, choose one of the two options:
   - Click and drag the vertical bar between the workbook results and the split pane of the Analysis Design Panel.
   - Use the Task Pane Properties button and choose Size.

2. To move the position of the panel, for instance from the defaulted right side to the left side of the workbook results, choose one of these two options:
   - Click on the Analysis heading of the Design panel and drag and drop the Design Panel to the preferred location.
   - Use the Task Pane Properties button and choose Move, then drag and drop the Design Panel to the preferred location.

Note: The modifications and sizing will remain even if you close Analysis or hide and display the panel again. However, if you close the workbook and open / refresh again, you may have to display and size or modify the Design Panel again.
Using the Design Panel (cont.)

Use the Analysis Tab in the Design Panel

1. Click into a crosstab cell within the workbook to choose the correct data source for analyzing and formatting, especially if you have embedded multiple data sources in a workbook.

2. Use the Analysis tab at the bottom of the Design Panel to see the available fields for the data source and the fields currently used to display the data in a crosstab of columns and rows.

3. Use the Data Source section in the Analysis tab to:
   - Identify which data source (query, etc.) was selected in the crosstab as displayed in the first line of the Data Source section, and verify you are working with the right one if multiple data sources are embedded in the workbook.
   - Change what is included in the workbook results by adding or removing columns and rows in the workbook results through drag and drop or right click functionality.
   - Swap the entire view of the workbook, such as swapping the view from a view by the Duke Cost Object to a view by Commitment Item (G/L Account).
Using the Design Panel (cont.)

4. Use the *Columns* and *Rows* sections to:
   - Verify which measures (numerical values where mathematical functions can be used) are available in columns and which members (qualitative data not for mathematical functions) are available as rows in the current workbook results.
   - Add or remove columns and rows from the workbook results by using the drag and drop or right mouse click functions to move a Data Source field into or out of those sections. For example, to see the Actual Amount column broken out by Posting Periods, drag and drop that field from Data Source into columns and the amounts broken down by Posting Period are then displayed across columns in the workbook (detailed steps for functions by topic are outlined later in this guide).
   - Swap rows with columns in the workbook results by using the Swap Axes button, located to the far right in the heading of the *Rows* section.

5. Use the *Background Filter* section to see all the fields that are currently defined as background filters, if applicable (none applicable in this example).

6. If needed, use the Find field at the top of the Design Panel to search for a field or value by entering a numeric or character strings and note the following:
   - The sections for Columns, Rows, and Background Filter are expanded automatically by the search function.
   - The search results are highlighted in yellow as shown below.

![Image of Design Panel with search results highlighted in yellow]
Using the Design Panel (cont.)

Show the Properties View in the Analysis Tab of the Design Panel

Note: The Design Panel must already be displayed in the workbook, in order for the Show Property View to be activated.

1. Click on the \(\downarrow\) Drop-down for the Display button located on the toolbar under the Analysis tab.

2. Click on Show Property View to open a panel on the right side of the Excel workbook (Properties will NOT display until the Display Design Panel is selected).

3. Use the Properties view now added to the Design Panel to format the workbook results, such as eliminating technical descriptions in a column or suppressing zero values in rows.
4. Select a data source element on the left side of the Design Panel to display the options available as Properties for that selected element and note the following:

   • The element selected will display in the Description field at the top of the Properties view.
   • The available Properties for the data element selected will display in the Properties view, like Sort options, etc.

Note: *Detailed steps for functions are covered in the Analysis and Formatting sections later in this guide.*
Using the Design Panel (cont.)

Show the Technical Names in the Analysis Tab of the Design Panel

Note: The Design Panel must already be displayed in the workbook, in order for the Show Technical Names section to be activated.

1. Click on the Drop-down for the Display button located on the toolbar under the Analysis tab.

2. Click on Show Technical Names to display the technical names for fields in each section of the panel (Technical Names will NOT display until the Display Design Panel is selected).

3. Review the technical names now displayed for reference as needed (detailed steps for functions by topic are outlined later in this guide).
Using the Design Panel (cont.)

Use the Information Tab in the Design Panel

Note: The Information tab may be used to view information about the data source and workbook. In addition, the tab may be used to insert Info Fields and quick Filters into the workbook (see details for those topics outlined later in this guide).

1. Click on the Information tab located at the bottom of the Analysis Design Panel window.

Note: The Design Panel must already be displayed in the workbook to select the Information tab.
Using the Design Panel (cont.)

2. Click and drag section borders to size the sections as needed.

3. Use the **Drop-down** for the **Information for**: field to select the complete workbook or one of the inserted data sources (if multiple queries are embedded for example) and view the information about that selected data source.

4. Review the top section of the Information tab containing Info Fields which can be inserted into a workbook through the drag and drop function) as follows:
   - Data Source Name
   - Key Date
   - Last Data Update
     - For MultiProviders (more than one data source), two dates are displayed.
     - The **LastDataUpdate** is the date when ALL of the InfoProviders of the MultiProvider were updated successfully for the last time.
     - The **LastDataUpdateMaximum** is the date when a single InfoProvider of the MultiProvider was updated for the last time (not shown in this example).

   **Note:** Drag and drop selected fields into Excel cells outside of the crosstab to insert and display the Info Fields in the workbook. Detailed steps for functions by topic are outlined later in this guide.

5. Review the **Variables** section of the Information tab that contains selection values used as Prompts which can be inserted into a workbook as information through the drag and drop function. Some examples include:
   - Fiscal Year
   - Posting Period Range
   - Commitment Item Range
   - Duke Cost Object Hierarchy Node (BFR Code)

   **Note:** Drag and drop selected fields into Excel cells outside of the crosstab to insert and display the Info Fields in the workbook. Detailed steps for functions by topic are outlined later in this guide.
Using the Design Panel (cont.)

6. Review the Filters section of the Information tab that contains filter values used in the workbook which can be inserted into a workbook as information through the drag and drop function. Some examples include:

- Commitment Item Range
- Company Code
- Duke Cost Object (top level BFR Code that was chosen)
- Fiscal Year

Note: Drag and drop selected fields into Excel cells outside of the crosstab to insert and display the Info Fields in the workbook. Detailed steps for functions by topic are outlined later in this guide.

7. Review the Information section of the Information tab that contains other fields which can be inserted into a workbook as information through the drag and drop function. Some examples include:

- Query Technical Name
- InfoProvider Technical Name
- InfoProvider Name
- Created By
- Last Changed By
- Last Changed At
- System
- Logged On User

Note: Drag and drop selected fields into Excel cells outside of the crosstab to insert and display the Info Fields in the workbook. Detailed steps for functions by topic are outlined later in this guide.
Using the Design Panel (cont.)

Use the Components Tab in the Design Panel

**Note:** The **Components** tab may be used to view all components used in the workbook together with the properties of these components. The tab helps you manage system connections for the workbook to log off from all systems that are connected to the workbook, reconnect to systems, or replace a system with another system (BWP to BWT, etc.). In addition, the Components tab contains some formatting options like optimizing cell width and height, as well as displaying or suppressing repeated members in rows. Details for these topics are outlined later in this guide.

1. Click on the **Components** tab located at the bottom of the Analysis Design Panel window.

2. The components displayed will vary by the radio button selected for Data Source or By Sheet.

3. The components displayed in the Properties section will also vary by the level of component selected in the structure (the data source or crosstab).

**Note:** The **Design Panel must already be displayed** in the workbook, in order to select the Components tab.

1. Click on the **Components** tab located at the bottom of the Analysis Design Panel window.
2. Select the appropriate radio button to list the components by **Data Source** (embedded query) or **Sheet** (if multiple sheets are included) and note the following:

- The components display below and the properties for each component display under **Properties** in the panel below.
- Regardless of radio button chosen, in both cases the highest node of the list is the workbook.
- Regardless of radio button chosen, the Properties section will contain two tabs – General and Planning.

3. To view components and properties at the lower nodes, select the level desired directly under the radio buttons to change what is displayed in the lower part of the Components tab.

*Note:* In this example Data Source remains selected at the highest node in the structure listed.
Using the Design Panel (cont.)

4. Review the properties available under the **General** tab and use option mainly for the option outlined below as follows:

- **Merge Variables** – If the check box is enabled, the prompt variables are merged for all data sources. If the check box is NOT enabled, the prompt variables can be specified for each data source separately.
5. Review the properties available when selecting by the query or crosstab at the top of the Components tab as shown in the examples above.

Repeat members is a commonly used option especially when downloading data to a shadow system. This function is available here, but the preferred method is outlined in the Other Functions section of the guide and the topic titled Display or Suppress Repeated Members in Rows.