



Filtered Summary v2.0
User Guide



Filtered Summary Introduction

Filtered Summary plugin component for Xcelsius® 2008 provides robust filtering and aggregation capabilities with point and click simplicity. Inject powerful data manipulation capabilities into your dashboards, making it easier than ever to navigate and drill information while alleviating redundant Excel logic and queries.

Filtered Summary is a transparent calculation component that can be injected into any Xcelsius dashboard to dynamically summarize data. Filtered Summary evaluates source data and calculation properties to aggregate and insert into a destination range. Filtered Summary replaces dashboard capabilities traditionally achieved using SUMIF and COUNTIF Excel functions, or redundant queries. With minimal impact on performance and overhead, Filtered Summary is the optimal solution for any dashboard containing filtering and drill down capabilities.

FILTERED SUMMARY	Filtered Summary	List	Count	Sum	Average
	US	West, North	3	1300	22%
EMEA	EMEA	2	540	16%	

SOURCE DATA	Region	State	Reps	Sales	Growth
	US	West	5	220	20%
US	West	10	430	35%	
US	North	9	650	10%	
EMEA	EMEA	2	340	7%	
EMEA	EMEA	7	200	25%	

Install Requirements

Client Requirements

Xcelsius 2008 Service Pack 1 and Greater
Adobe Flash player 9 and higher

Install Disk Space

2 MB

More Information

If you have any questions about this document please contact Centigon Solutions support at:

support@centigonsolutions.com

<http://centigonsolutions.com/support.html>

For more information, documentation, or templates for Background Builder, visit the website at <http://www.centigonsolutions.com/components/backgroundbuilder.html>

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Upgrading from Version 1.X

Following an upgrade from version 1.x to 2.0, any dashboard containing a legacy version of Filtered Summary (1.x) will NOT retain its bindings. The backwards compatibility between versions are due to significant enhancements to the component property structure. For more information about migration, please contact support@centigonsolutions.com.

Filtered Summary V2.0 features significant enhancements for supporting new filtering and aggregation capabilities required to build robust analysis. To benefit from these new capabilities within Filtered Summary, Xcelsius developers are required to purge and re-insert Filtered Summary into the dashboard.

For any additional questions about upgrading and migration, feel free to contact Centigon Solutions support at:

support@centigonsolutions.com

Install Directions

1. Open Xcelsius 2008 Service Pack 1 or higher.
2. Click File>Manage Add-Ons
3. Click on Install Add-On.
4. Navigate and to the downloaded Filtered Summary.xlsx file.
5. Close the Add-On Manager
6. Re-open Xcelsius 2008 to access Filtered Summary in the Other folder.

Properties Sheet Overview

General Tab

Source Data- Data Range to be filtered and/or summarized. Upon binding the Source Data, the Columns list box is populated with a list of each column.

Destination Range- Data range where the filtered and/or summarized data is inserted. The destination should contain the same number of columns as the source data. Upon binding data to the Source Data property, a list of columns will be populated within the Columns list box.

Enable Summary Calculations- Toggle for turning the summarization feature on or off. Summary calculations drive dynamic aggregation of Source Data before it is inserted into the Destination Range. Checking Summary Calculations will enable the Aggregate Column Index and Calculation Type properties. Toggling the Summary Calculations off will allow a developer to utilize Filtered Summary for its dynamic filtering capabilities only.

Aggregate Column Index- Entered as a single numeric value, the Aggregate Column property identifies the column for which the Source Data is aggregated by. The default Aggregate Column Index is 1, meaning the data is summarized by the first column. Leaving the property blank will enable the default column (1). A bound Aggregate Column index will re-execute the summarization calculation each time the index number is changed.

Columns- List of columns driven by the Source Data property, and generates a list of bound columns. Each column within filtered summary is controlled individually. Detailed control over each individual column within the Filtered Summary to ensure a scalable and maintainable solution for filtering, searching, and aggregating data dynamically during runtime. The following column properties are set for each column.

Column Name- Identify each column with a name to provide context for the dashboard developer. The column names are specifically designed for the Xcelsius developer and do not affect runtime functionality.

Default: The default column names are the word "Column" + column number.

The screenshot displays the 'General' tab of a properties sheet. At the top, there are three tabs: 'General' (selected), 'Behavior', and 'Data Preview'. The 'Source Data' field is a text box with a selection icon. Below it is the 'Destination Data' field, also with a selection icon. A checked checkbox labeled 'Enable Summary Calculations' is present, with a help icon. The 'Aggregate Column Index' is a text box containing the value '1' and a selection icon. The 'Columns' section features a large empty list box on the left. To its right, several properties are listed: 'Column Name' (text box), 'Column Filters' (text box with selection icon and help icon), 'Calculation Type' (dropdown menu set to 'List' with help icon), 'Filter Type' (dropdown menu set to 'Equals' with help icon), and 'List Destination' (text box with selection icon and help icon).

Properties Sheet Overview

General Tab (Continued)

...Continued from page 5

Column Filter- Filter data from the source data range using Column Filter values. Each column is capable of containing one or multiple filters, resulting in tremendous control over what data is displayed in the Destination range. Multiple filters can be assigned to a Column Filter property using a comma separated list. *Example: "west, east, north"*

Default- Column Filter is an optional property with a default of ALL (). A blank value or wildcard symbol "*" within the Column Filter cell will result in ALL records being displayed.*

Filter Type- Refine the filtering operation with "Equals" or "Contains" operations that provide standard filtering using column filter values.

Equals- Filter data as an exact match to the Column Filter Values.

Data/Column Filter Value

Bob=Bob

Bob=Bobby - not an exact match

Contains- Filter data as when the data contains the Column Filter values

Data/Column Filter Value

Bob=Bob

Bob=Bobby

Bob=B

Bob=Bond - Does not contain the characters "Bob"

Calculation Type- Select one of 4 calculation types to filtered data to enable dynamic summarization of data before it is inserted into the destination range. The Calculation Type is activated when the Enable Summary Calculations property is checked. The data aggregation is driven by the Aggregate Column Index property (*see page 5*). Each column is controlled independently as the data is aggregated as a List, Count, Sum, or Average.

List- List will filter the column and place the list of unique values into the destination as a comma separated string.

Count- Count will provide a numerical count of the number of records.

Sum- Calculate the sum of all values for each record within the column

Average- Calculate average of all values for each record within the column.

The screenshot displays the 'General' tab of a software interface. At the top, there are three icons: a calendar for 'General', a wrench for 'Behavior', and a magnifying glass for 'Data Preview'. Below these are several input fields and controls:

- Source Data:** A text input field with a selection icon to its right.
- Destination Data:** A text input field with a selection icon to its right.
- Enable Summary Calculations:** A checked checkbox with a help icon to its right.
- Aggregate Column Index:** A text input field containing the value '1' with a selection icon to its right.
- Columns:** A large empty rectangular area for listing columns.
- Column Name:** A text input field.
- Column Filters:** A text input field with a selection icon and a help icon to its right.
- Calculation Type:** A dropdown menu currently set to 'List' with a help icon to its right.
- Filter Type:** A dropdown menu currently set to 'Equals' with a help icon to its right.
- List Destination:** A text input field with a selection icon and a help icon to its right.

Properties Sheet Overview

General Tab (Continued)

...Continued from page 6

List Destination- Destination range where distinct values within the Source Data column are inserted. Each column can contain a unique List Destination thus creating an effective method for capturing unique values within each column of source data.

List Destination	Region	State	Reps
US	US	West	5
EMEA	US	West	10
	EMEA	EMEA	2
	EMEA	EMEA	7

The screenshot shows the 'General' tab of a configuration interface. At the top, there are three tabs: 'General' (selected), 'Behavior', and 'Data Preview'. Below the tabs are several configuration sections:

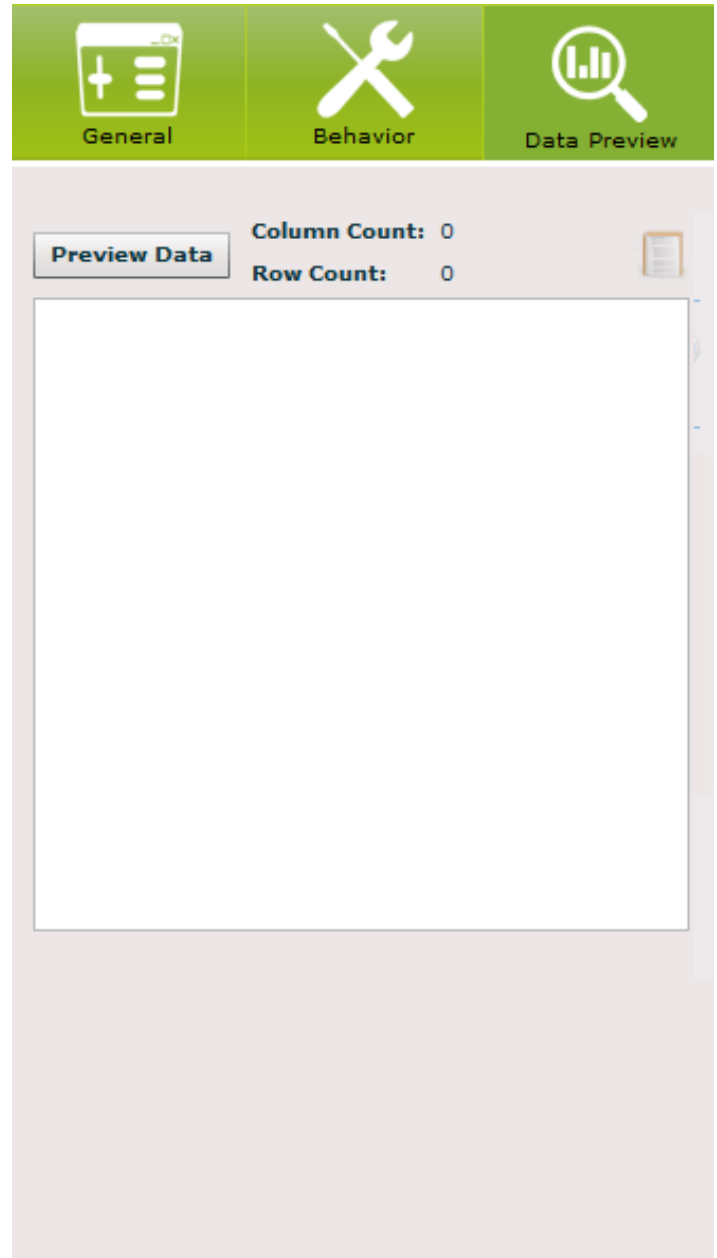
- Source Data:** A text input field with a selection icon.
- Destination Data:** A text input field with a selection icon.
- Enable Summary Calculations:** A checked checkbox with a help icon.
- Aggregate Column Index:** A text input field containing the value '1' with a selection icon.
- Columns:** A large empty rectangular area for defining columns.
- Column Name:** A text input field.
- Column Filters:** A text input field with a selection icon and a help icon.
- Calculation Type:** A dropdown menu set to 'List' with a help icon.
- Filter Type:** A dropdown menu set to 'Equals' with a help icon.
- List Destination:** A text input field with a selection icon and a help icon.

Properties Sheet Overview

Data Preview

Preview Data- Intended to simplify the dashboard development process the preview window will display the resulting Filtered Summary data as it would appear in the Destination Range during runtime. Intended for design and debugging, dashboard developers can easily refine properties and test the Filtered Summary calculations to ensure the data output is correct.

Copy to Clipboard- Clicking on the copy to clipboard icon will copy the Destination Range as tab delimited values which can be pasted back into the Xcelsius dashboard. This capability streamlines Xcelsius developer's ability to mock-up charts and tables using a true representation of the filtered/summarized data.



Properties Sheet Overview

Information Tab

*All elements on the Information tab require an internet connection.

Jumpstart Video- Jumpstart your usage of this component using a quick demonstration video.

Documentation- Download and view PDF product documentation.

Technical Support- Contact support or login to Centigon Solutions customer portal:

<http://support.centigonsolutions.com>

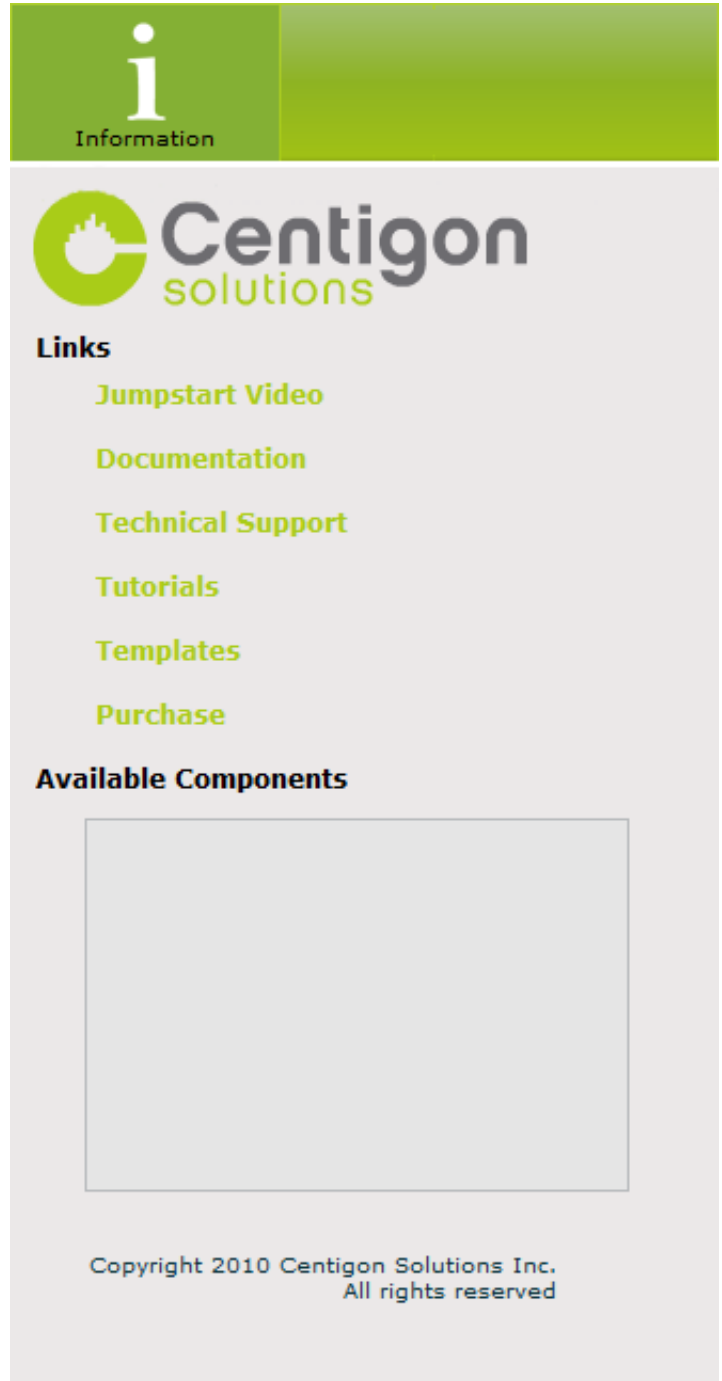
Tutorials: Online tutorials, articles, and white papers for all Centigon Solutions products:

<http://centigonsolutions.com/tutorials.html>

Templates- Download free templates using Centigon Solutions components.

Purchase- Purchase copies of this component directly from Centigon Solutions web store.

Available Components- A real time list of all available components from Centigon Solutions. Selecting any component from the list box will launch a browser that navigates to component specific information.



The image shows a UI mockup for the 'Information' tab. It features a green header bar with a white lowercase 'i' icon and the word 'Information' below it. Below the header is the Centigon Solutions logo, which consists of a green circular icon with a white gear-like shape inside, followed by the text 'Centigon solutions' in a dark grey font. Underneath the logo is a section titled 'Links' in bold black text, followed by a list of links: 'Jumpstart Video', 'Documentation', 'Technical Support', 'Tutorials', 'Templates', and 'Purchase', all in green text. Below the links is a section titled 'Available Components' in bold black text, followed by a large, empty rectangular box. At the bottom of the mockup, there is a copyright notice: 'Copyright 2010 Centigon Solutions Inc. All rights reserved'.

Using Filtered Summary

01. Bind the Source Data to a range that will be summarized, then inserted into a destination. Upon binding the Source Data, the Columns list box will populate with a list of columns, which can be configured individually.

02. Bind the Destination Range, where the filtered summary data is inserted. The destination range should have the same number of columns as the Source Data.

03. With Enable Summary Calculations checked, Bind the aggregate column index to a single cell. The column index is a numeric position starting at the left most column within the source data dictates how the remaining columns are filtered. The data is aggregated using the values present in the in the column.

04. Insert Column names to identify each column to improve development and maintenance.

05. Bind the Column Filter to a cell containing a single or comma separated value. Leaving any column filter un-bound will result in an ALL selection.

07. Select the Filter type from Equals or Containing to control how the data within each column is filtered.

08. Select the calculation type to control the column calculation. (Comma separated list, count, sum, or average).

09. Bind the List Destination to capture all unique values within the column. The list destination can be re-used by other Xcelsius components as labels.

Behavior Tab

10. Check Include Total to insert the Total calculation within the Destination Range

11. Toggle the Total Location from Top to Bottom

Preview Tab

12. Click on the Preview Data button to view the Filtered Summary output that will be generated during SWF runtime. If changes to the General tab properties are made, re-clicking Preview Data will generate new results.

13. Click on the Copy to Clipboard icon. The output data can be pasted back into the Xcelsius/Excel spreadsheet where the Filtered Summary Destination Range is bound.

Aggregate Col Index	1	2	3	4	5
	Region	State	Reps	Sales	Growth
1	US	West	5	220	20%
	US	West	10	430	35%
	US	North	9	650	10%
	EMEA	EMEA	2	340	7%
	EMEA	EMEA	7	200	25%

List Destination	Region	State	Reps
US	US	West	5
EMEA	US	West	10
	EMEA	EMEA	2
	EMEA	EMEA	7

Filtered Summary	List	Count	Sum	Average
Total	N/A	5	1840	38%
US	West, North	3	1300	22%
EMEA	EMEA	2	540	16%

Region	State	Reps	Sales	Growth
US	West	5	220	20%
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