Use the Table Wizards

The Table and Chart Wizards enable you to create ad-hoc tables and charts. After you create the charts and reports in an Excel workbook, you can save the report locally on your PC.

You can refresh the data in the workbook to see the latest up-to-date information from Accolade.

You can create charts and reports using the Accolade Table Wizard and Accolade Chart Wizard if:

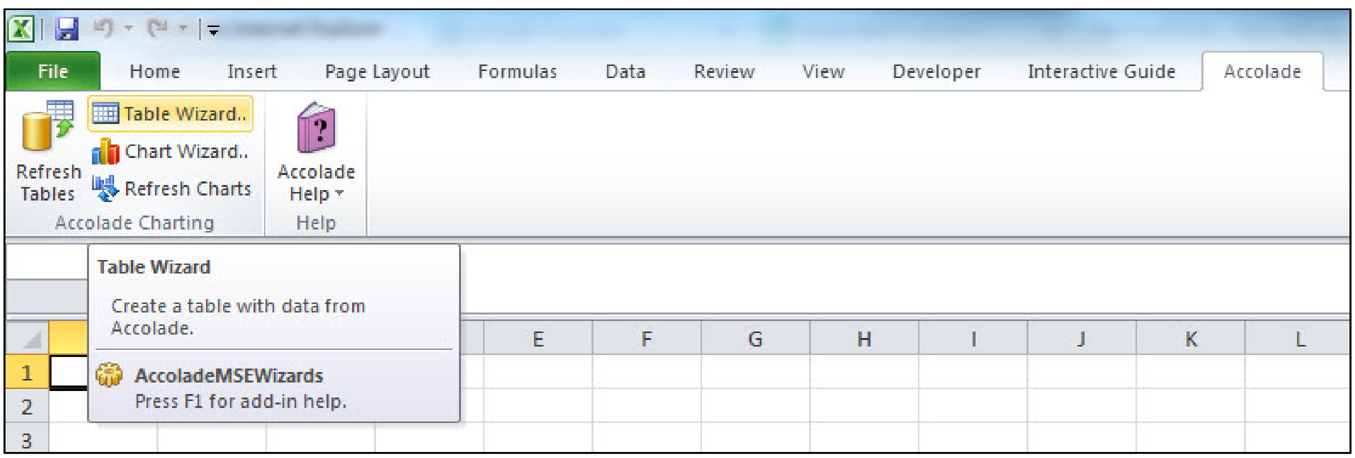
- You have Accolade Charting for MS Excel installed on your computer
- You have been given rights to use the Table Wizard

The Table Wizard will lead you through the following steps:

- Select Action
- Select Subject
- Select Columns
- Filter Data
- Summarize Data
- Sort Table
- Order Columns
- Table Location

Select Action (Top)

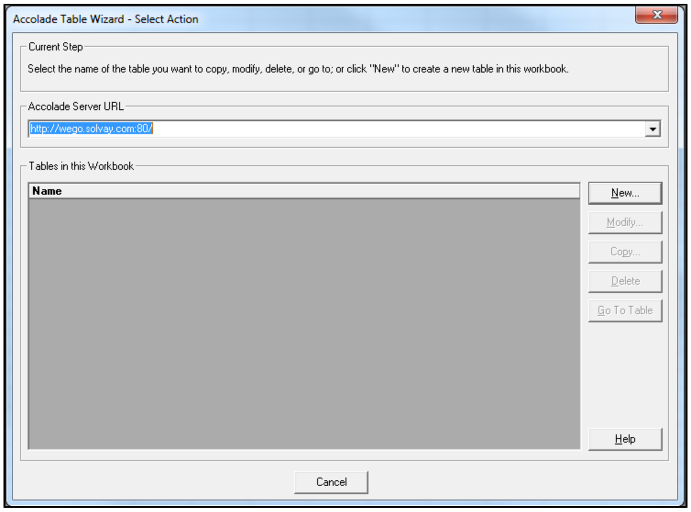
1.On the Accolade menu of the Excel workbook, point to **Accolade**, and then click **Table Wizard**.



2.Accolade Server URL :

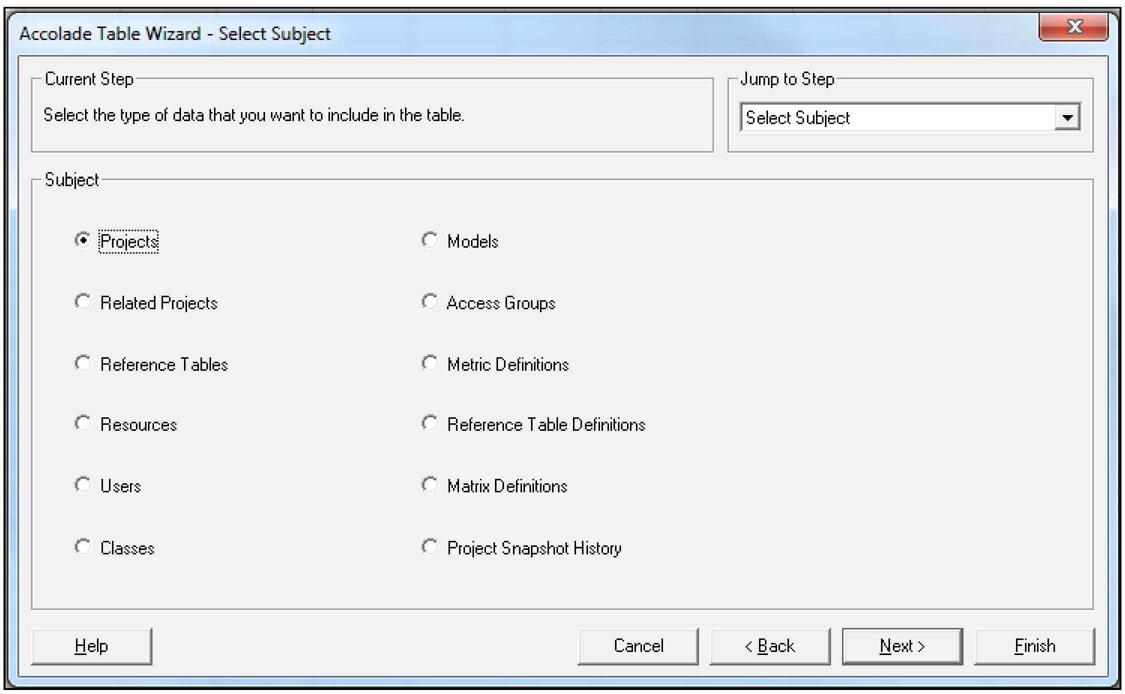
1. WEGO production System : http://wego.solvay.com:80/
2. SBS production System : http://biarritz.solvay.com:80/

3.Click **New**.



Select Subject (Top)

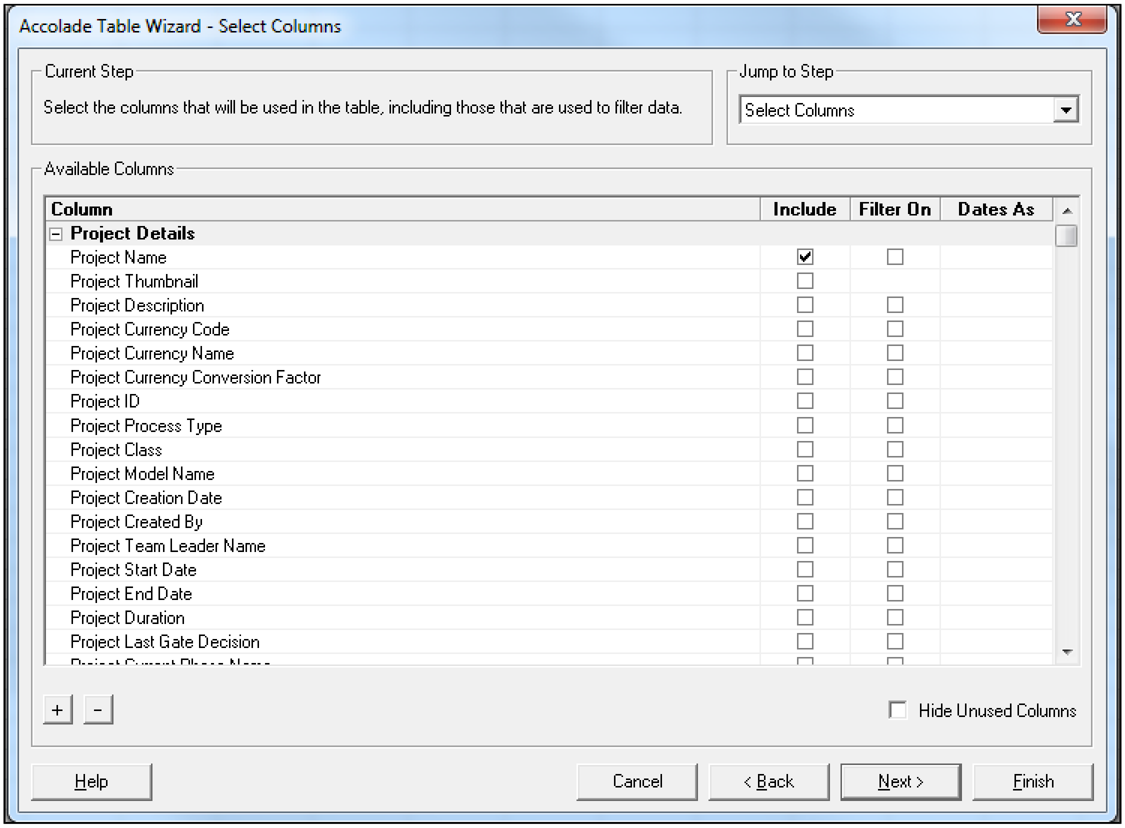
1. Click the **Projects** option.



2.Click **Next**.

Select Columns (Top)

In this step you can select the columns that will be used to create the table and determine how they will be used. (list of the Metrics)



1.Before you begin selecting columns, experiment with the + and - buttons in the lower left corner. These buttons allow you to quickly locate the group of columns you are looking for without scrolling through the entire list.

2.In the Include column, select the check boxes beside the data columns that you want to include in the finished table:

Metric	Category
a. GBU or R&I	Project Identity
b. BU or R&I Platform	Project Identity
c. Project ID	Project Details
d. Project Name	Project Details
e. Project Team Leader Name	Project Details
f. Project Current Phase ID	Project Details
g. System Current Phase Name	Project Details
h. Project Description	Project Details
i. Project Closed (used only as Filter on)	Project Details
j. Strategic Purpose	Portfolio Analysis
k. Project Category	NT20 – Project Metrics
l. Passed Milestone %	Process KPI
m. Total Project Cost Overall	NT06-CashFlow

3.In the **Filter On** column, select the check boxes beside the data columns that you want to use to filter the data in the finished table:

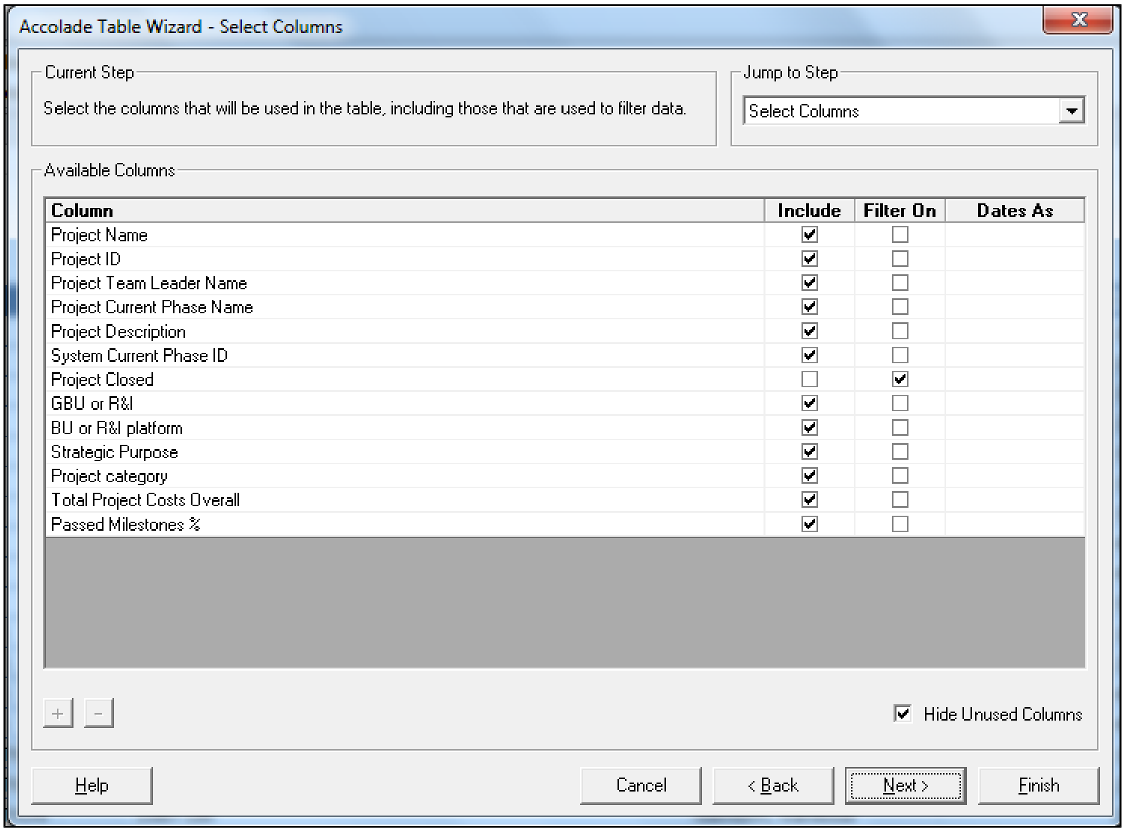
a.Project Closed

If you also select the corresponding Include column, the filtering column will be included in the table; otherwise, not.

4.In **Dates As** column, click the row of Project Deliverable Stream Deadline (in the category Project Deliverable Stream) and select Quarters.

Dates can be displayed either as a specific day, month, yearly quarter, or year, or as Excel Dates, a format that allows you to manipulate dates with numeric formulas in Excel or to customize the date display.

5.Select the **Hide Unused Columns** check box if you want to see only those columns that will be used to create the table.



6.Click **Next.**

Filter Data (Top)

In this step you can construct the filters for each filter column that you selected on the previous step.

1.Click the name of the filter column: Project Closed.

2.Under Filter Details, in the left-hand box, select how to compare the data from the database to the values you specify in the filter. For Project Closed, select IS ONE OF.

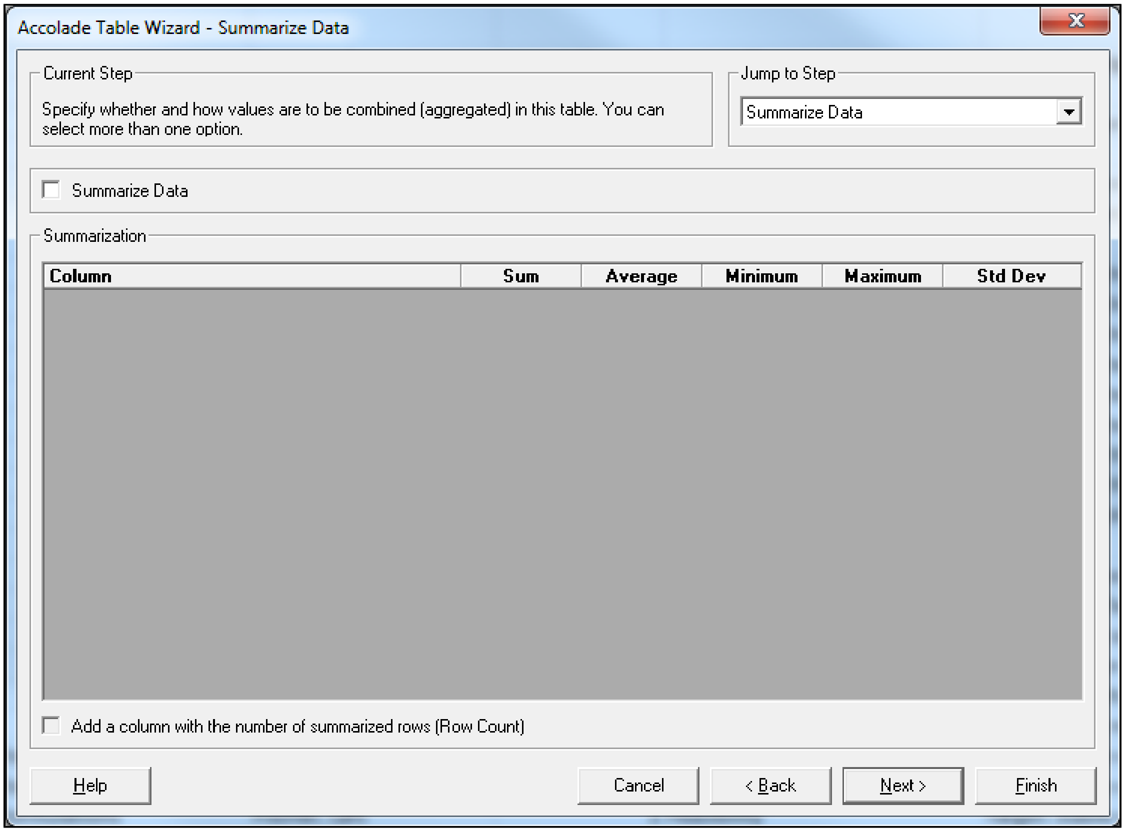
3.In the right-hand box, type or select the filter value that you want to compare to the database data. For Project Closed, select “Open” to display only the current projects in your future table.

4.Select the **Allow this filter...** check box. This will allow users to modify this filter when they open the workbook (refreshing the table).

5.Click **Next**.

Summarize Data (Top)

In this step you can choose whether and how to combine values in this table. To summarize values is to calculate a value, such as a sum or average, for the values in one column that are associated with a single item in a different column.



1.Click **Next**.

Sort Table (Top)

In this step, you can select the columns to use in sorting the table rows if you want the table's rows to be arranged in a particular sequence.

1.In the box, click the name of a column that you want to use to sort the table, in this case: GBU or R&I.

2.Then click the right-arrow button to add the column to the Sort By box. The rows in the result table will be arranged in the same order as the rows in this column.

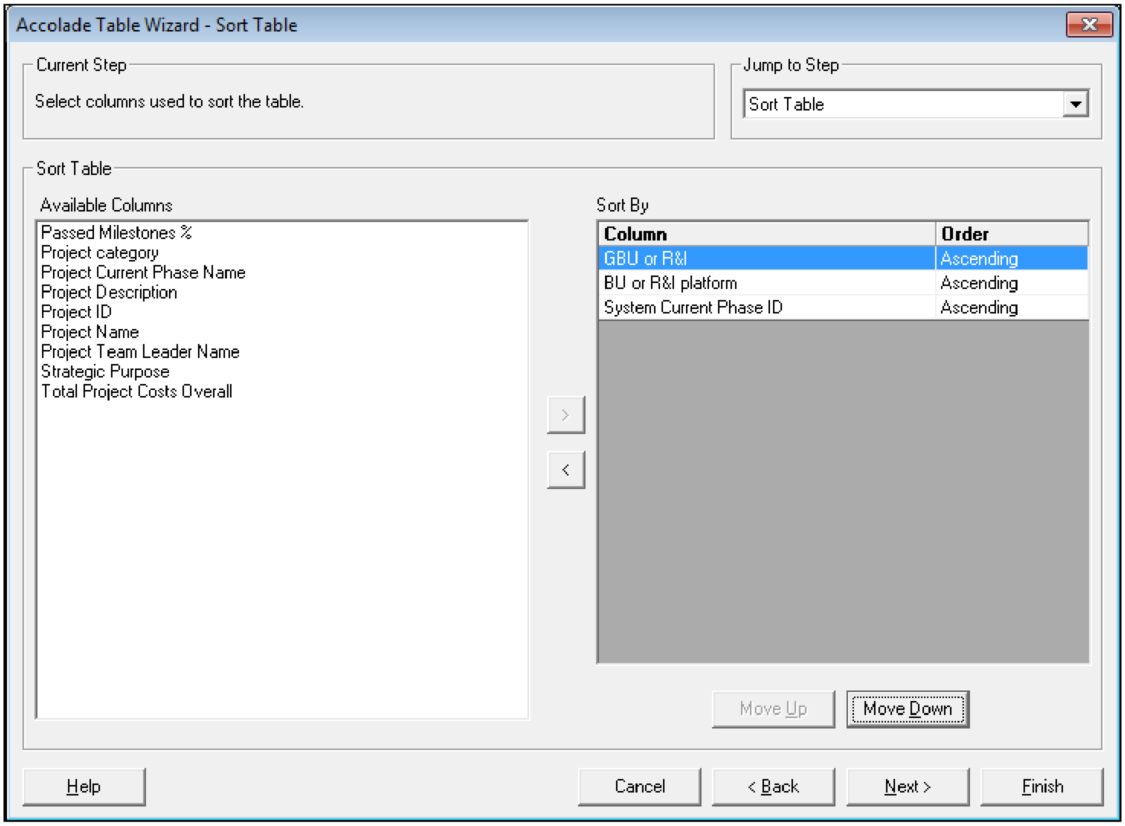
3.If you are sorting by more than one column, you can click a column name in the Sort By box and then click **Move Up** or **Move Down** to modify the sort order.

The top column is the primary sort. Within that order, the second column will provide the secondary sort, and so on. Make sure that:

a. GBU or R&I

b. BU or R&I Platform

c. System Current Phase ID



4.Click **Next**.

Order Columns (Top)

In this step you can arrange the left to right order of the columns in the result table and give the columns more user-friendly headings.

1.Click a name under Column and then click Move Up or Move Down to move the data column up or down in the list. The top column in this list will be the left-most column in the table. Make sure that:

a. GBU or R&I

b. BU or R&I Platform

c. Project ID

d. Project Name

e. Project Team Leader Name

f. System Current Phase ID

g. Project Current Phase Name

h. Project Description

i. Strategic Purpose

j. Project Category

k. Passed Milestone %

l. Total Project Cost Overall

2.Click a row under Displayed Column Heading and type the heading that you want to show for this data column. This column heading will be displayed in the result table or in a chart produced from that table. Heading names must be unique within the table.

a. Rename Project Team Leader Name to Project Leader

b. Rename System Current Phase ID to Current Phase ID

c. Rename Project Current Phase Name to Current Phase.

3.Click **Next**.

Table Location (Top)

1.Select a place where to create the table. You can select a new or an existing worksheet. In this case, create a new worksheet named Data.

An existing worksheet will be cleared of all contents when the table is created. Do not create a table on a worksheet that contains data that you want to save.

2.Type the name of the new table in the Table Name box: Training Table Wizard.

Table names must be unique within the workbook.

3.Clear the **Launch the Accolade chart wizard...** check box.

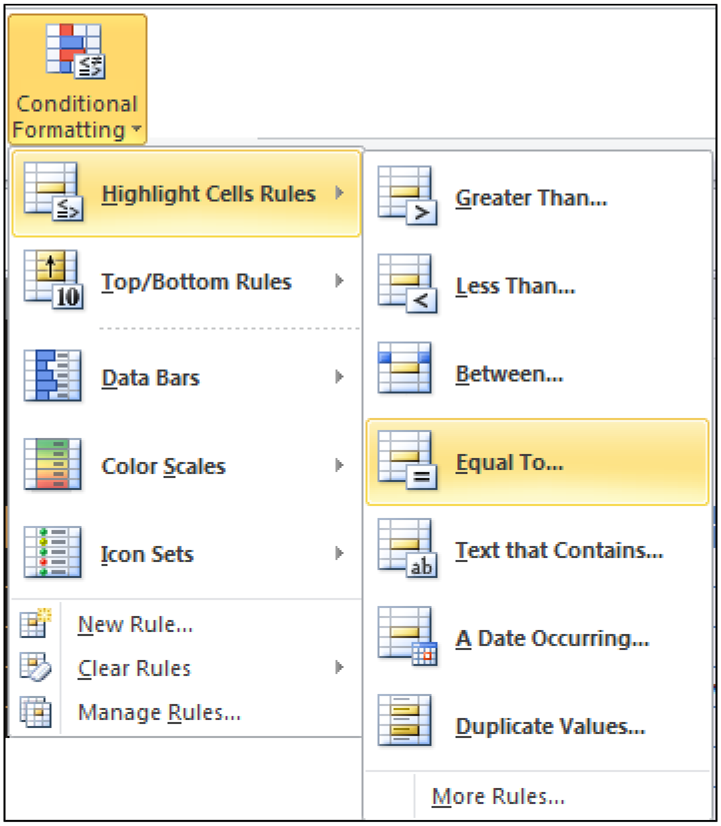
4.Click **Finish**.

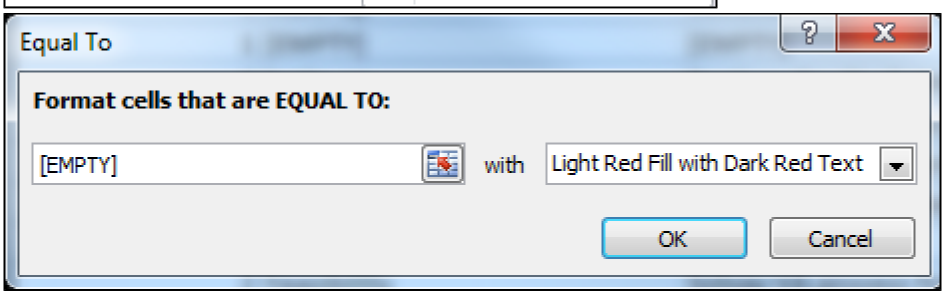
5.If you need to add formulas to the worksheet, you can add them to the right or left of the table or you can add the Conditional Formatting selecting a column.

a. For example, select the column “E” and select the Conditional Formatting in the Home tab of the menu

(i) Select Highlight Cells Rules and Equal To…

(ii) Type [EMPTY]





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