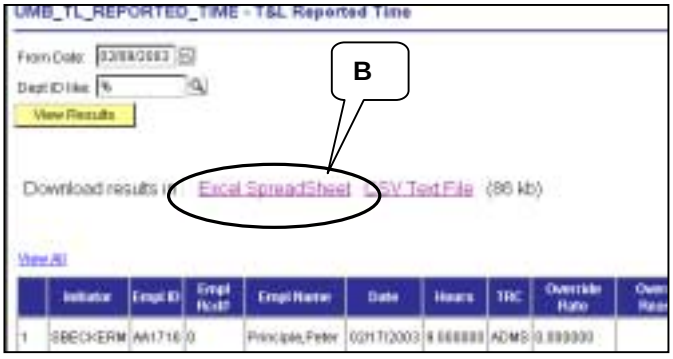
Pivot Tables Made Easy

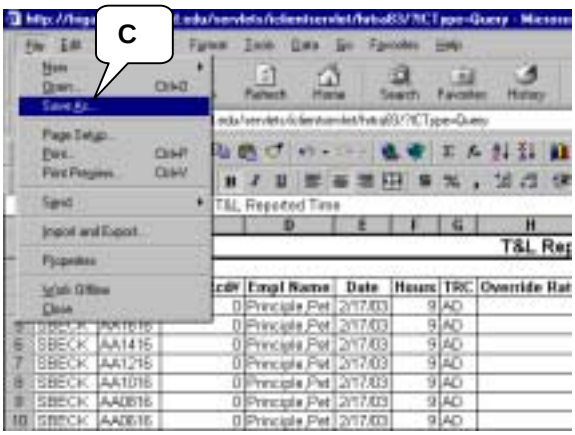
How to Save an *e*UMB Query as an Excel Spreadsheet and Use the Pivot Table Report to Analyze the Results

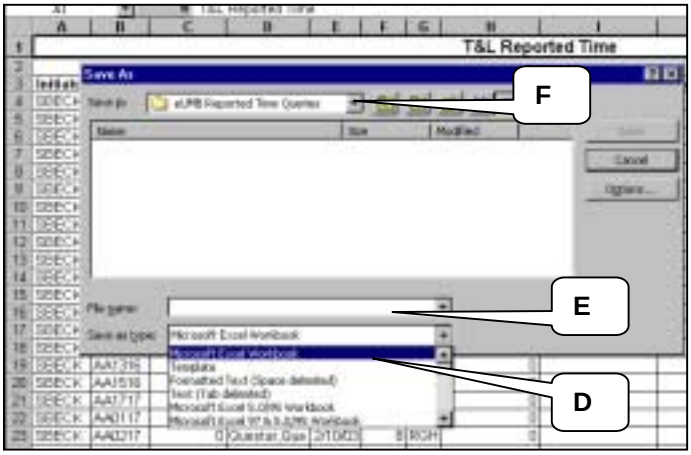
A. **Navigate** to the Query manager and **run** the query
B. **Click** the Excel Spreadsheet link (this will open another browser window)
C. **Click** on **File, Save As** from the Menu Bar (in the new window)
D. **Select** Excel Workbook from the *Save As Type* drop down list
E. **Click** in the *File Name* cell and type a file name (spaces and numbers allowed)
F. **Select** a location to save it in from the *Save In* drop down list
G. **Click Save**

Now just:

Close the window (click the **X** in the top right corner of the Query result window)
Open Excel, then open the file from the **File, Open Menu Bar** (or Open Toolbar button)
You can now begin using Auto Filter or Pivot Table Report, sort your data, etc.







Pivot Tables Made Easy
(for *e*UMB Reporting)

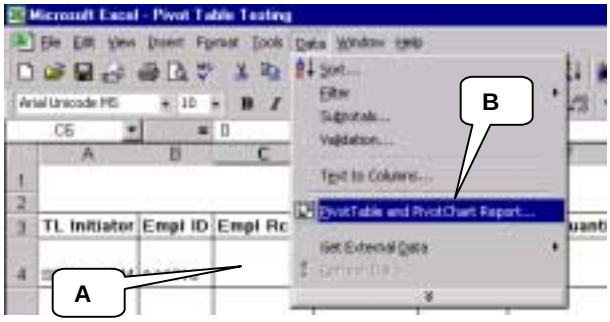
These instructions are for Microsoft Excel version 2000

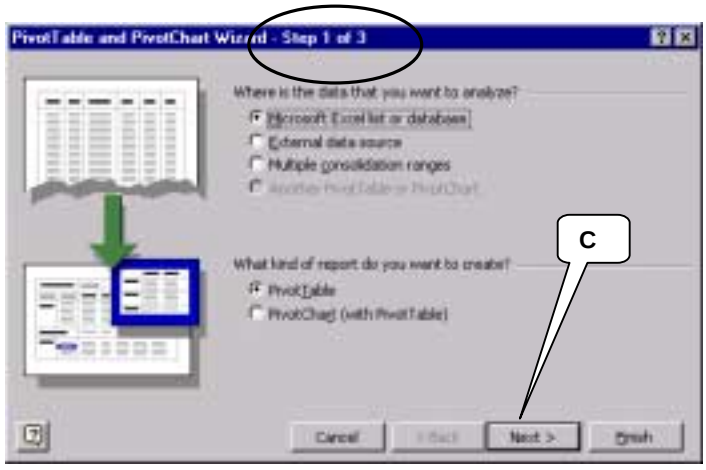
Pivot Tables

Pivot Tables provide users with a summary of data – a "cross-tab" result. It allows users to expand or collapse details easily, ***and*** add other fields (columns) to the result. Bottom line: you will be able to take a large quantity of data from a query and get a summary from it – quickly and easily!

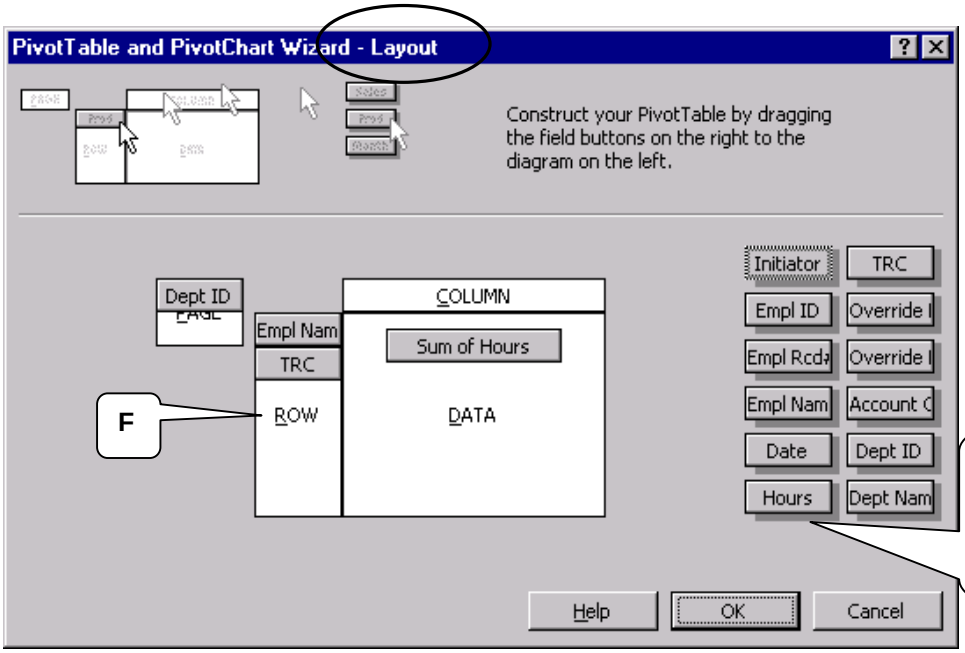
To create a Pivot Table from an Excel spreadsheet:

A. **Click anywhere in the data** below the title and field (column) header rows.
B. Click on **Data**, **Pivot Table Report** from the **Menu Bar**** (this will open a 3-step Wizard)
C. **Indicate** that the data comes from Excel and click **Next** (Step 1 of the Pivot Table Wizard)
D. **Verify** the ***range*** of data used for the table and click **Next** (Step 2)
E. Choose **Layout** from the Pivot Table Wizard Dialogue Box (Step 3)
F. **Construct** the Pivot Table by ***dragging and dropping*** the fields (column names) to the appropriate areas of the Pivot Table Wizard diagram (Page, Row, Data, Column) as illustrated in graphic F and click **OK**
G. **Choose** whether to locate the Pivot Table in a **New Worksheet** or an Existing Worksheet (the one your data is in) and click **Finish** – Note: the **default** *and recommended* is New Worksheet

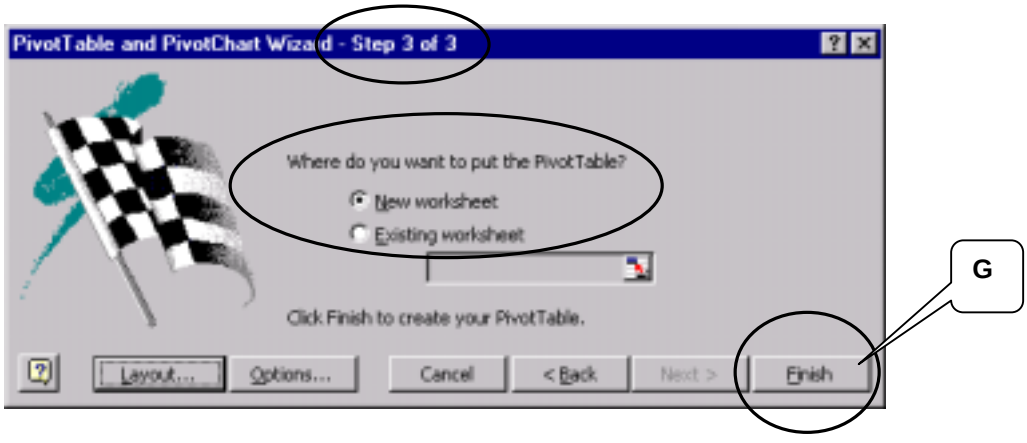




** **Note**: the first time you use the Pivot Table, it may not be visible in the Menu Bar list – at least not right away. If you've never used it before, it is "hidden" in the topics list for a couple of seconds. This is a Microsoft feature that shows "the most common tools" until Excel "learns" you like a new tool! Once you've "used" a tool, *then* it will display when the Menu Bar Item is selected. Also note – in Excel 97, the Wizard will be a 4 step, but looks just the same!

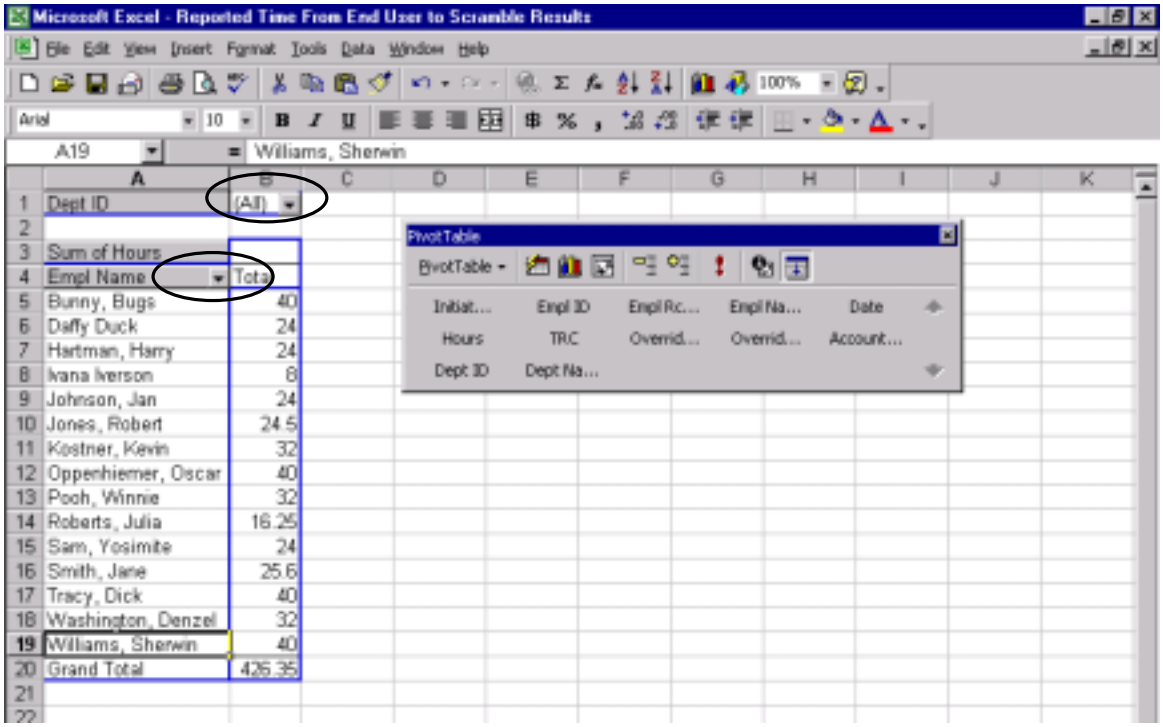


Drag and Drop the fields from the list to the display and click OK. When you add Hours to the Data area, it will change to SUM of Hours – adding them!



The next page displays the results:

The Results



	A	B
1	Dept ID	(All)
2		
3	Sum of Hours	
4	Empl Name	Total
5	Bunny, Bugs	40
6	Daffy Duck	24
7	Hartman, Harry	24
8	Ivana Iverson	8
9	Johnson, Jan	24
10	Jones, Robert	24.5
11	Kostner, Kevin	32
12	Oppenheimer, Oscar	40
13	Pooh, Winnie	32
14	Roberts, Julia	16.25
15	Sam, Yosimite	24
16	Smith, Jane	25.6
17	Tracy, Dick	40
18	Washington, Denzel	32
19	Williams, Sherwin	40
20	Grand Total	425.35
21		
22		

You can print this out to review the total hours entered (reported). Then, you can add other fields to the Pivot Table and print out those results – slowly building an analytical spreadsheet.

Note that since you dragged DeptID to the "Page" area (Step F), DeptID is now a field you can **select** (from the drop-down arrow). This allows you to view departments one-at-a-time or all together.

Anytime you see a drop-down arrow, you will be able to choose. You can zero in on one employee using the Empl Name drop down arrow, for instance.

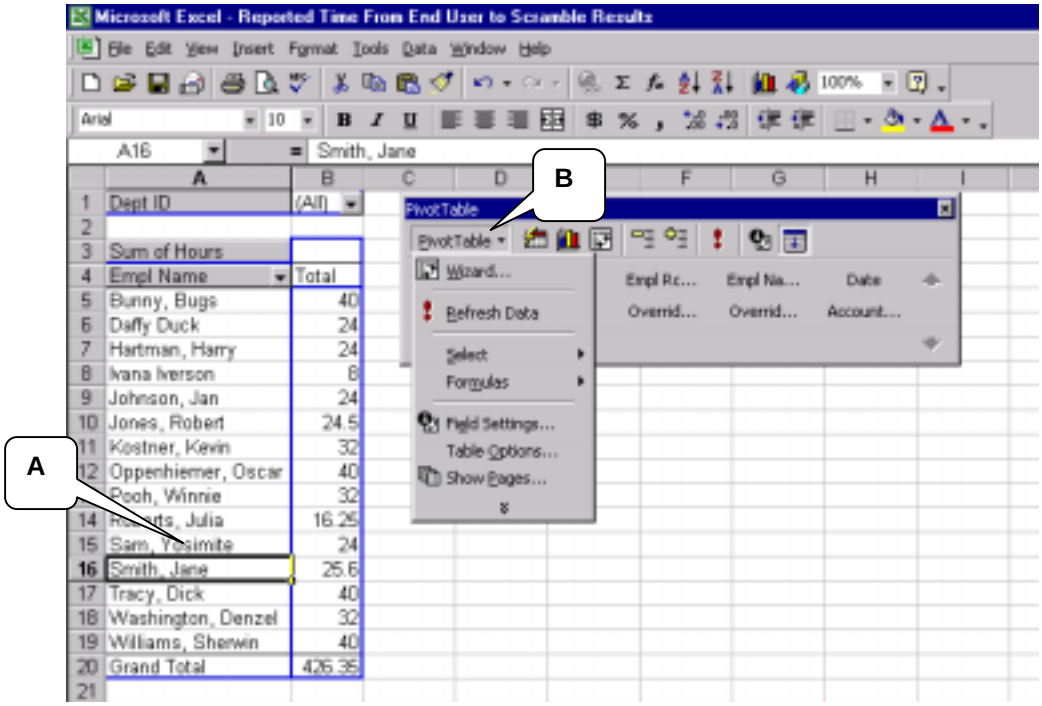
This is not a substitute for Auto Filter – it is a complementary tool.

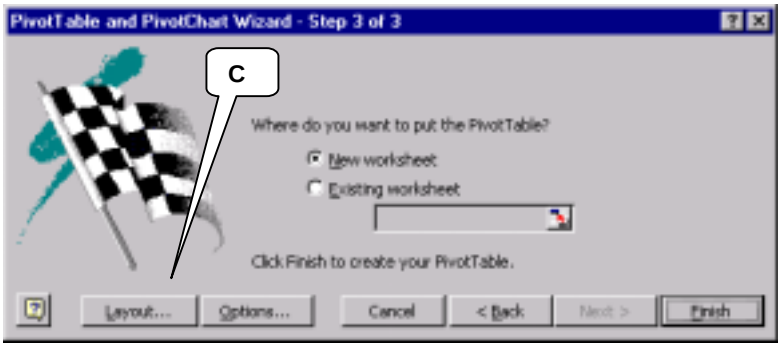
Modifying the Pivot Table

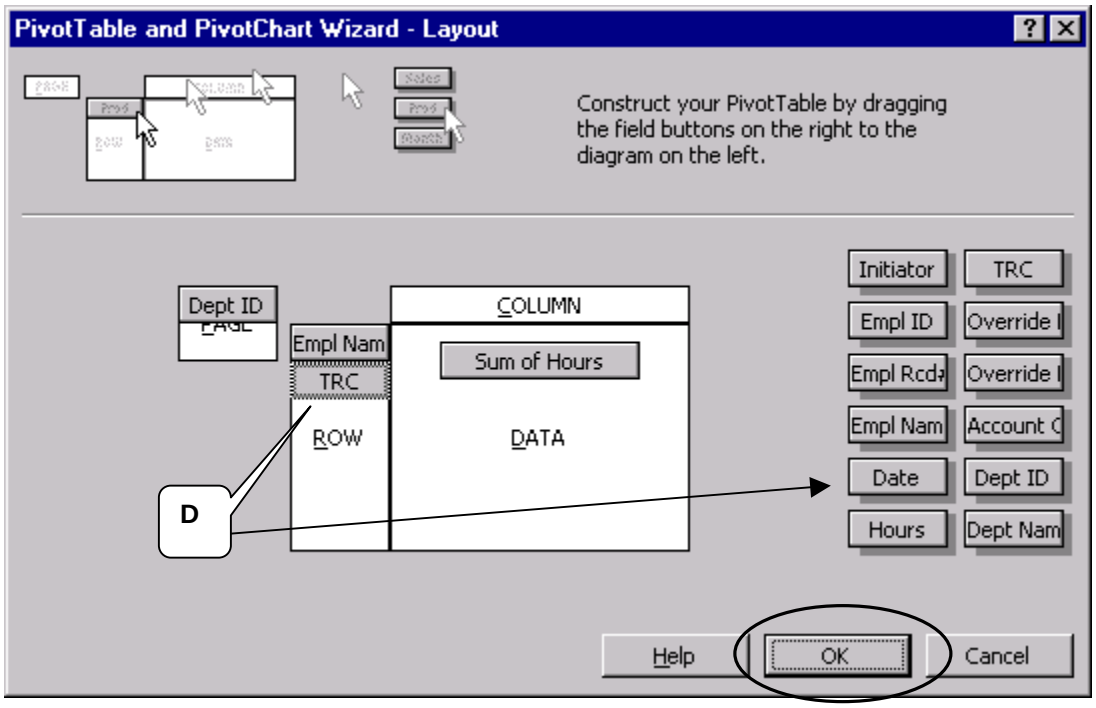
Now that you've done a basic pivot table, you are ready to try adding more fields (columns) to your result. For instance, you may want to view the TRC's (Time Reporting Codes) associated with the hours for each employee. Simply go back to the **Wizard** and change the **Layout**.

Here's How:

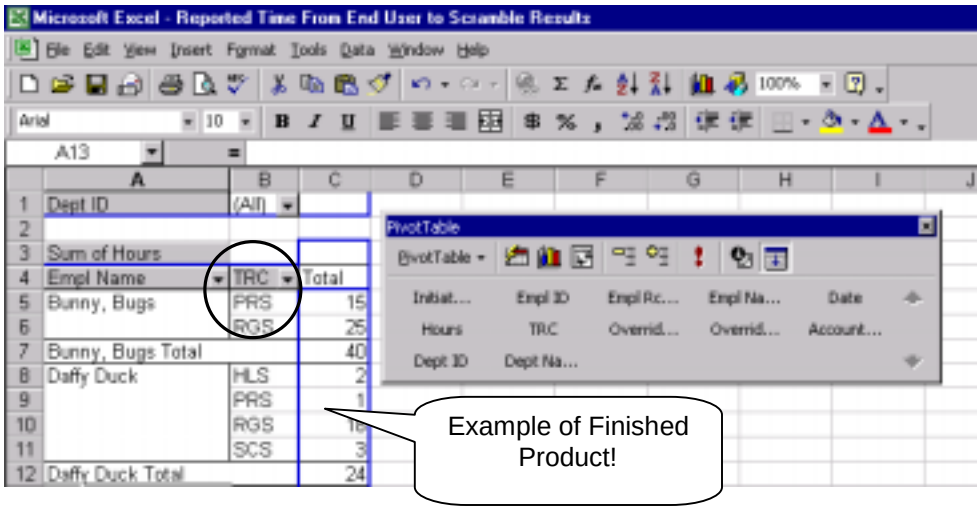
A. **Click anywhere in the Pivot Table** (that will make the Pivot Table Tool Bar Active).
B. **Click** the Pivot Table **button** from the Pivot Table Tool Bar and choose **Wizard**
C. **Choose Layout** from the Step 3 of 3 dialogue box
D. **Drag and Drop** the TRC field from the field list to the display and **click OK** (in this example, **note** that the TRC field is dragged to the "**Row**" section)
E. Click **Finish** (accept the default "New Worksheet")






PivotTable and PivotChart Wizard - Layout
Construct your PivotTable by dragging the field buttons on the right to the diagram on the left.
Dept ID
PAGE
Empl Nam
TRC
ROW
COLUMN
Sum of Hours
DATA
D
Initiator
TRC
Empl ID
Override I
Empl Rcd
Override I
Empl Nam
Account C
Date
Dept ID
Hours
Dept Nam
Help
OK
Cancel

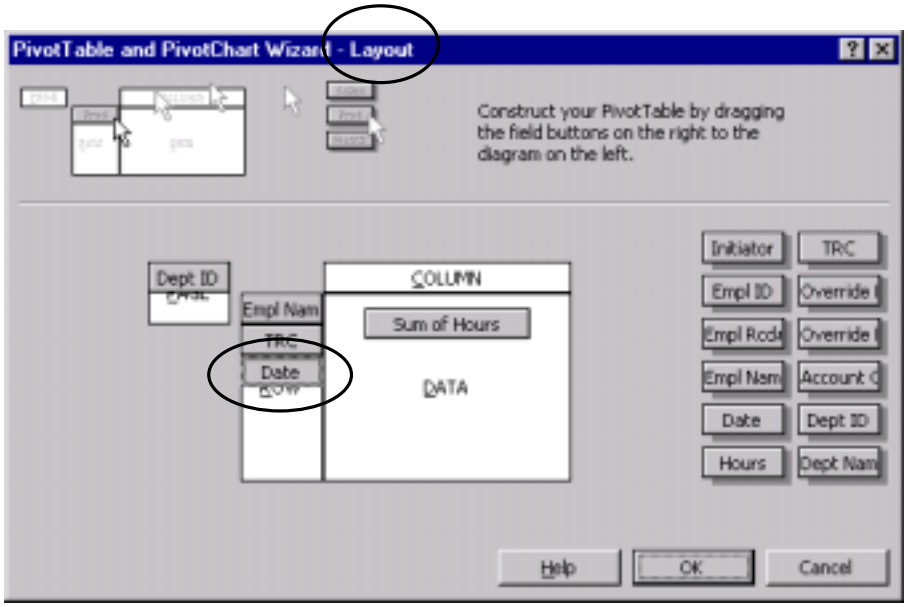

PivotTable and PivotChart Wizard - Step 3 of 3
Where do you want to put the PivotTable?
New worksheet
Existing worksheet
=A3
Click Finish to create your PivotTable.
E
Layout...
Options...
Cancel
< Back
Next >
Finish

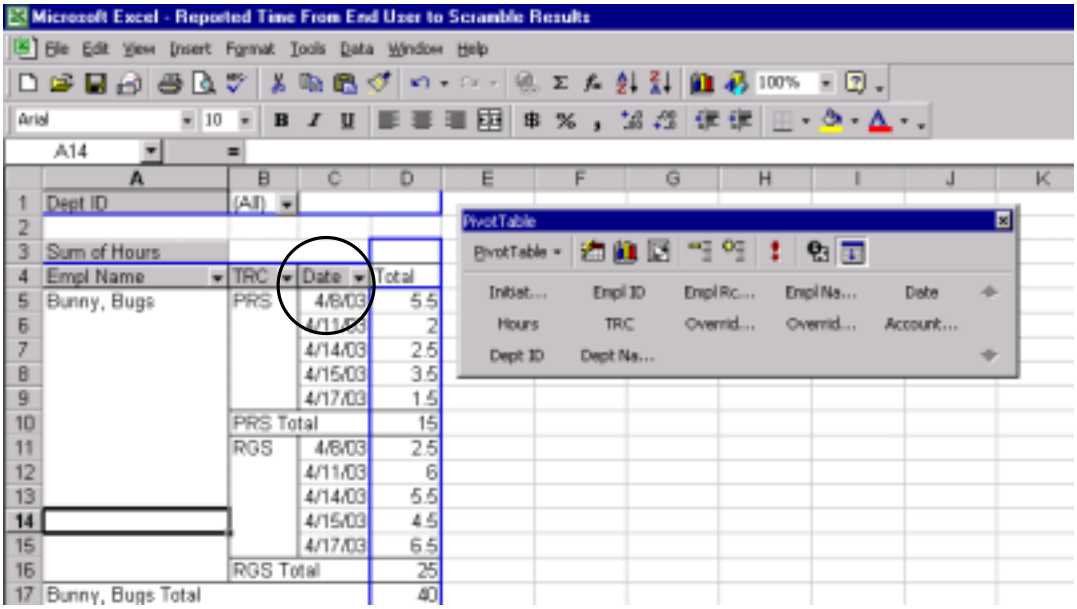

Microsoft Excel - Reported Time From End User to Scramble Results
Dept ID
(All)
Sum of Hours
Empl Name
TRC
Total
Bunny, Bugs
PRS
15
RGS
25
Bunny, Bugs Total
40
Daffy Duck
HLS
2
PRS
1
RGS
16
SCS
3
Daffy Duck Total
24
PivotTable
Example of Finished Product!

Modifying the Pivot Table

You can also add the Date field to the Row area and get the following result.

- **Click anywhere in the Pivot Table** (that will make the Pivot Table Tool Bar Active).
- **Click** the Pivot Table **button** from the Pivot Table Tool Bar and choose **Wizard**
- **Choose Layout** from the Step 3 of 3 dialogue box
- **Drag and Drop** the Date field from the list to the **Layout** display (Row area) and **click OK**
- Click **Finish**





Considerations

- Similar to Excel's Chart function, there is an "umbilical cord" between the data and the table, so any changes made to the data will affect the table – only NOT simultaneously! Users must refresh the data in the Pivot Table anytime there are changes. However, if you are using your data as a "snapshot" (like we do with *e*UMB Query results), you will *not* be changing the data in Excel, but in the database the data was extracted from (eUMB). Therefore, you should not have a need to refresh the data.

- You ***can*** drag and drop fields from the Pivot Table Tool Bar to the Pivot Table – but it is fraught with danger! Be careful, and remember – you can always: 1) use the "Oops" button (Undo), 2) delete the sheet tab that has the Pivot Table and start over, or 3) close and reopen the file without saving the changes!

- You can use this tool for any spreadsheet – just make sure that your data is **one contiguous set of information** – no completely blank rows or columns! Excel searches for what it thinks is your "base of data" as it applies these tools (Pivot Table, Auto Filter, Subtotals, Charts, etc.). This is an excellent analytical tool for eUMB, SIMS, budget and finance information, HR data, etc.

- Take your time! Add one field at a time. Don't try to add all fields at once – if it doesn't work, you won't know which field made it not work!