

## Pivot Charts


Excel Pivot Charts allow you to manipulate your AwareManager data into as many charts as you need. The charts can be easily created by dragging and dropping the fields you want to analyze, and they serve as a useful tool for getting snapshots of your data.


To run these reports, you first need to create a recordset in AwareManager with all of the data you want to look at in a Pivot Chart.

### Create a Recordset

1. First, right click on the **Work** capsule and select **Open With No Records**. This will bring up a blank Work List.
2. Manipulate the list to include all of the columns you want to appear on your recordset and use when making your Pivot Charts. Arrange them in your preferred order as this will be how your recordset is displayed.

**Note:** Do not Capture Settings as that will replace your current settings.

3. Click on the **Search** Icon (  )
4. In the Search window, select the applicable fields from the drop-down boxes. (For example: If you want to create Pivot Charts using work orders entered from January 1, 2009 to August 31, 2009, enter these dates).
5. At the bottom of the Work Search window, check the box that says **Store with Recordset**.
6. After checking the box, a field called Recordset Name will appear. Type in the title you want for your recordset.

Recordset Name:	<input type="text"/>
Launch:	<input checked="" type="radio"/> List Window <input checked="" type="radio"/> Private <input type="radio"/> Grid View <input type="radio"/> Global <input type="radio"/> Search Window <input type="radio"/> Division 

**Note:** Selecting Global or Division will make the recordset accessible to all users in the current division ("Division") or to all divisions ("Global").

7. Click on the Save button or press Enter to save.

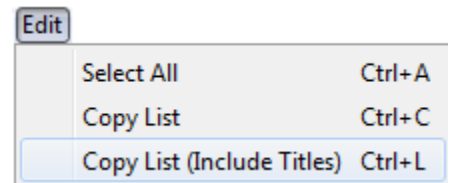
There is an option in Manage Recordsets to make recordsets launch a new search window before going straight to the records. This is ideal if you need to tweak your search terms slightly and do not want to make multiple Recordsets that search for basically the same thing. This is also helpful if you have Recordsets that include Dates. This option can be selected from the Recordset list or from selecting a recordset and using the Edit tool.

Recordsets with "Launch Search Window" checked off will bring up the search window with the fields and criteria ready to change. Any changes to the search will be automatically saved the next time you use that Recordset – this is very helpful for Pivot Chart recordsets that use dates!

Once you have set up your recordset with the columns you need to create your Pivot Charts, you can export the data into Excel.

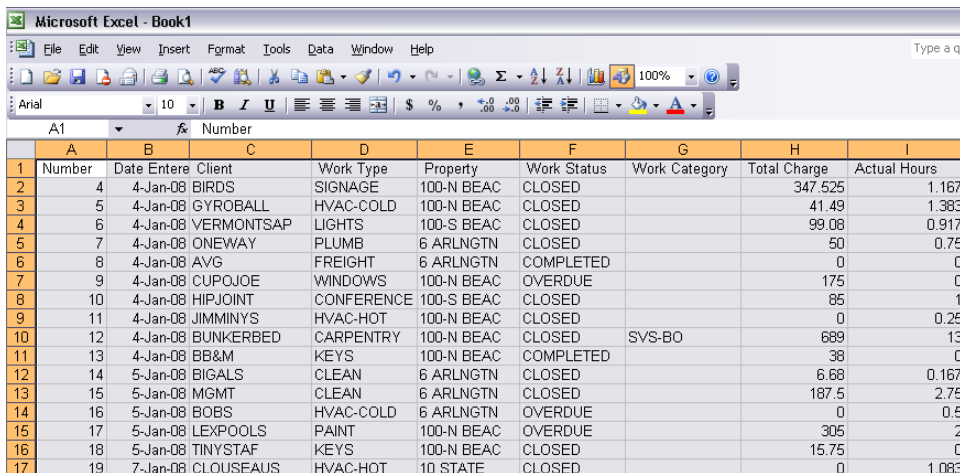
### Export the data

1. Open the recordset that contains the information you want to export.
2. Click on any line in the list and select **Edit→Copy List (Include Titles)**.



### View the data in Excel

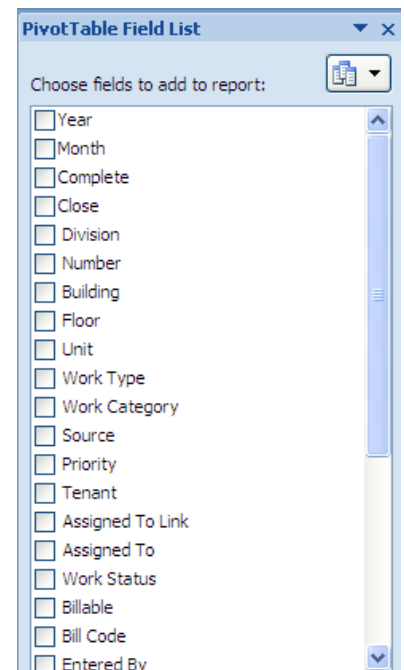
1. Open Excel and start a new worksheet.
2. Select **Edit→Paste**.
3. The data will appear with each column titled along the top row.



	A	B	C	D	E	F	G	H	I
1	Number	Date Entered	Client	Work Type	Property	Work Status	Work Category	Total Charge	Actual Hours
2	4	4-Jan-08	BIRDS	SIGNAGE	100-N BEAC	CLOSED		347.525	1.167
3	5	4-Jan-08	GYROBALL	HVAC-COLD	100-N BEAC	CLOSED		41.49	1.383
4	6	4-Jan-08	VERMONT SAP	LIGHTS	100-S BEAC	CLOSED		99.08	0.917
5	7	4-Jan-08	ONEWAY	PLUMB	6 ARLNGTN	CLOSED		50	0.75
6	8	4-Jan-08	AVG	FREIGHT	6 ARLNGTN	COMPLETED		0	0
7	9	4-Jan-08	CUPOJOE	WINDOWS	100-N BEAC	OVERDUE		175	0
8	10	4-Jan-08	HIPJOINT	CONFERENCE	100-S BEAC	CLOSED		85	1
9	11	4-Jan-08	JIMMINYS	HVAC-HOT	100-N BEAC	CLOSED		0	0.25
10	12	4-Jan-08	BUNKERBED	CARPENTRY	100-N BEAC	CLOSED	SVS-BO	689	13
11	13	4-Jan-08	BB&M	KEYS	100-N BEAC	COMPLETED		38	0
12	14	5-Jan-08	BIGALS	CLEAN	6 ARLNGTN	CLOSED		6.68	0.167
13	15	5-Jan-08	MGMT	CLEAN	6 ARLNGTN	CLOSED		187.5	2.75
14	16	5-Jan-08	BOBS	HVAC-COLD	6 ARLNGTN	OVERDUE		0	0.5
15	17	5-Jan-08	LEXPOLS	PAINT	100-N BEAC	OVERDUE		305	2
16	18	5-Jan-08	TINYSTAF	KEYS	100-N BEAC	CLOSED		15.75	0
17	19	7-Jan-08	CLOUSEAUS	HVAC-HOT	10 STATE	CLOSED		0	1.083

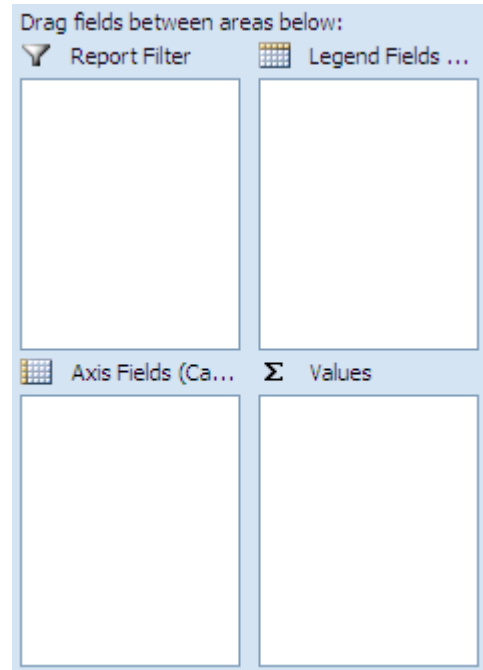
### Create Pivot Charts

1. Select all of the data, either by highlighting all of the cells or typing **Ctrl+A**.
2. Go to **Insert→Tables→PivotTable→PivotChart**.
3. Click OK to the selected data to be analyzed.
4. This opens a new worksheet where you can create your Pivot Chart.
5. A Pivot Table Field List appears on the right-hand side of the screen. This list shows you all of the available columns of data that can be analyzed through the Pivot Chart.

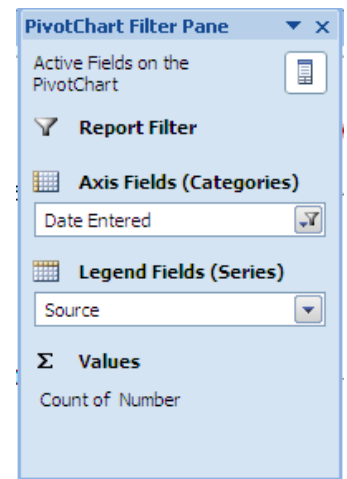


6. Drag and drop the column names into the appropriate fields below to filter the data and determine how the chart will be set up based on your needs

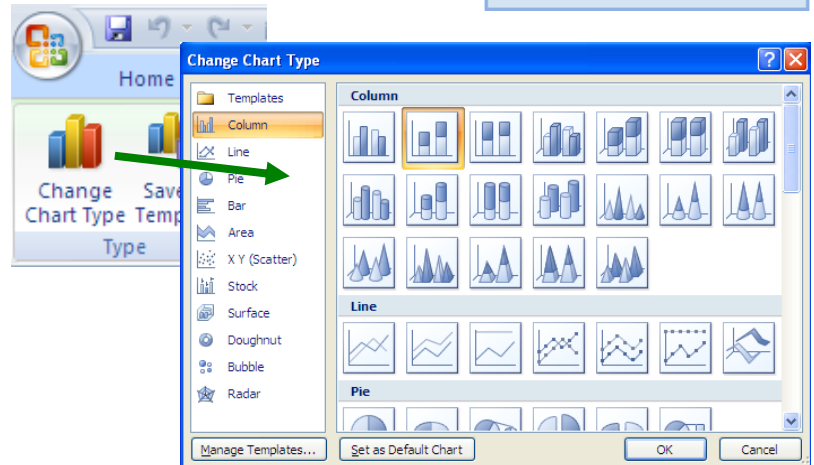
- **Axis fields (Categories) box:** Columns dropped here appear on the horizontal (x-axis) of the chart.
- **Legend fields (Series) box:** Columns dropped here appear in the legend of the chart.
- **The Report Filter box:** Allows you to filter a specific kind of data, without showing it on the chart.
- **Values:** the numeric Data used in the chart.



7. The PivotChart Filter Pane allows you to filter the data you have selected for the axis field, report filter and legend fields.



8. By going to **Design**→**Chart**→**Change Chart Type** you can change the format of your chart (column, line, pie, etc.).

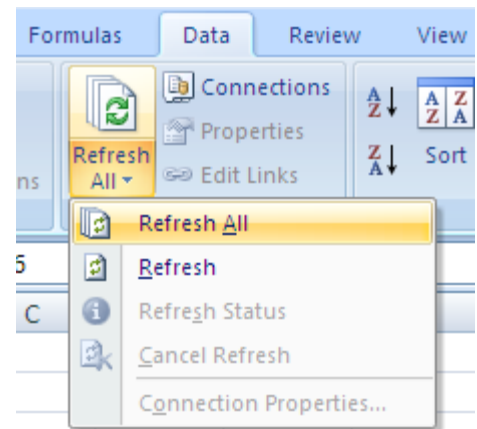
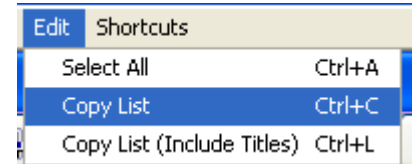


Once you have your Pivot Charts set up the way you need to view them, you can update them with additional data later on.

**Example:** If you run a year to date report at the end of every month and your Pivot Chart currently shows January-July, you can add August to the data and update your Pivot Charts without starting over.

### Update Pivot Charts

1. Open the Pivot Chart recordset and search for the data that needs to be added.
2. Select **Edit**→**Copy List** (from the menu bar).
3. Paste the additional data at the bottom of the data sheet in the Excel document.
4. Open one of the Pivot Charts created when making a Pivot Chart and select **Data**→**Connections**→**Refresh All**. This will update all the Pivot Charts in the workbook with the added data.



**Reminder:** If you have filters placed on specific Pivot Charts, you may have to change those to allow the viewing of the new data.

