

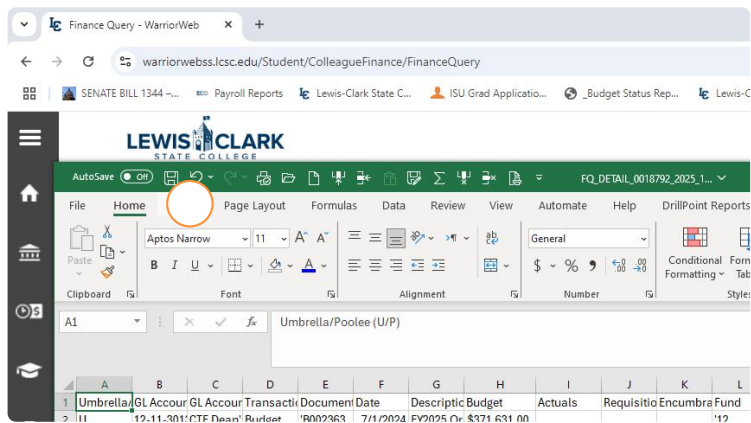


Create Pivot Table From Finance Query CSV

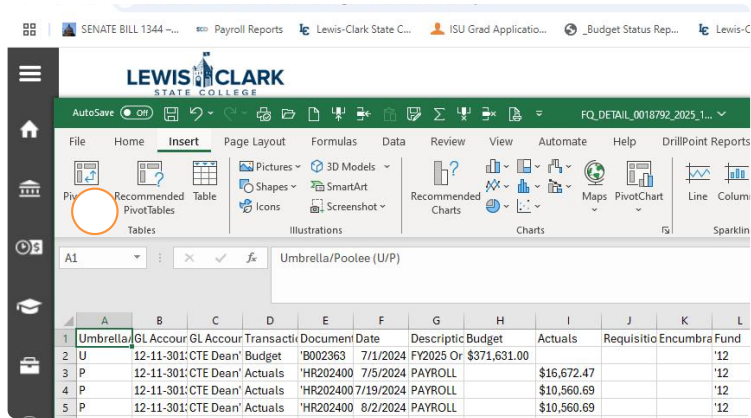
Cindy Patterson | 19 steps | 2 seconds

This Scribe is only visible to you. Make any changes and then share it.

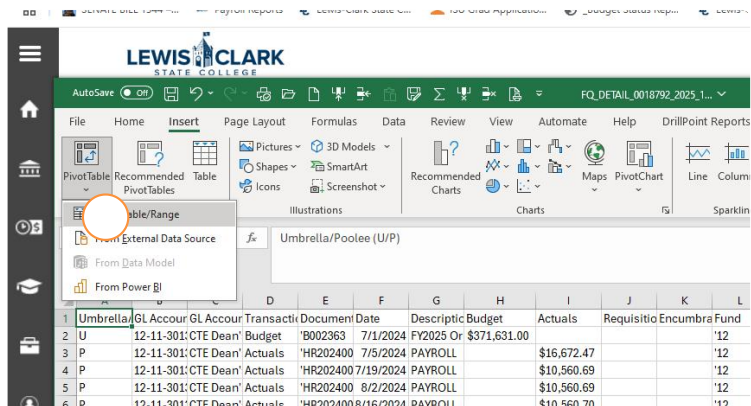
1 In CSV file, click "Insert"



2 Click "Pivot Table"

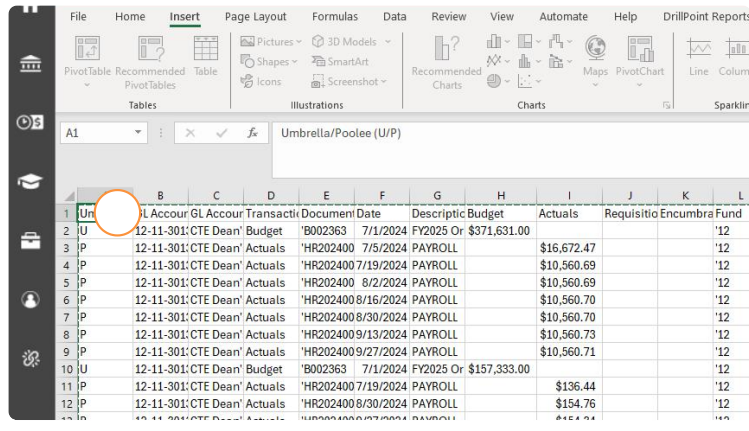


3 Click "From Table/Range"

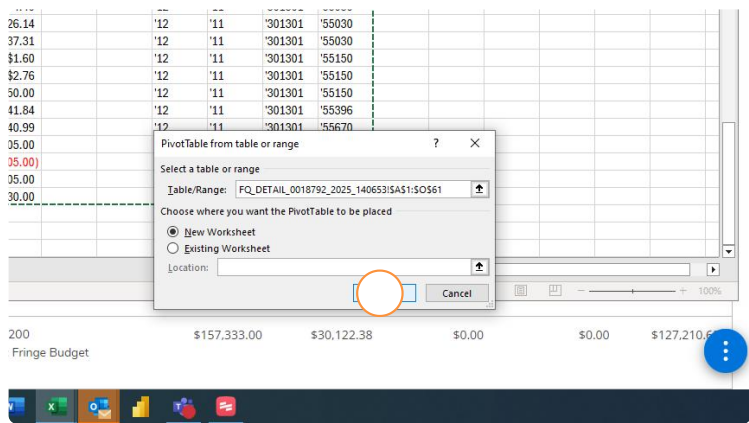


Create Pivot Table From Finance Query CSV

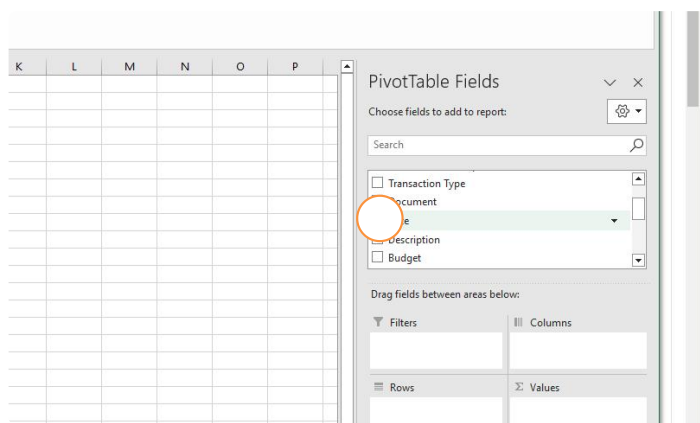
4 Select range of data to include (include headers)



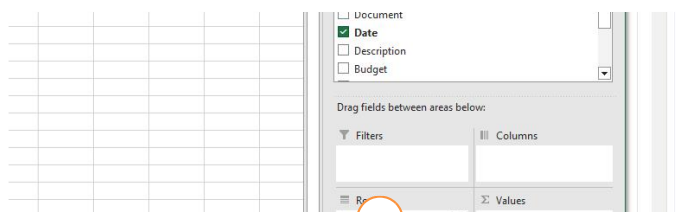
5 Once data range is selected, click "OK" and a "PivotTable Fields" box will appear



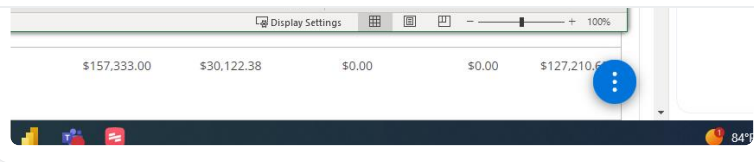
6 Click "Date"



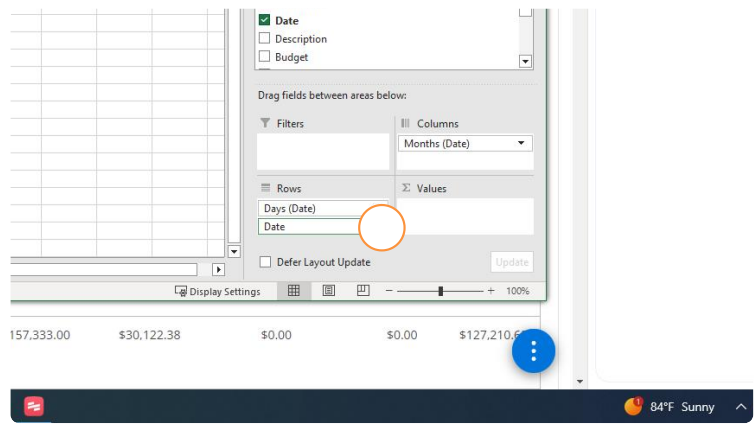
7 Click "Months (Date)" and move to "Columns"



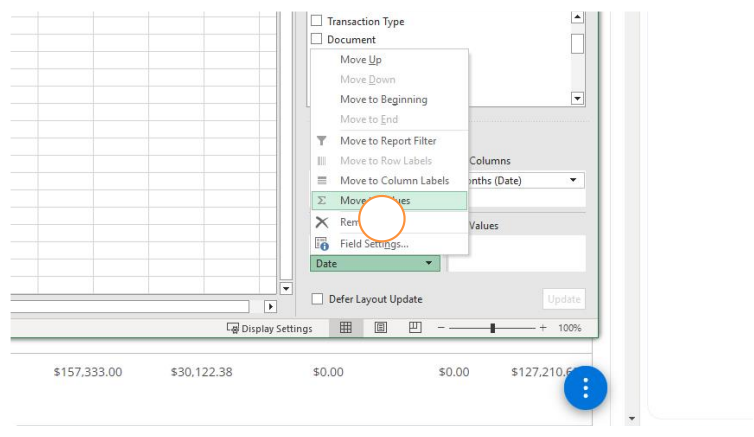
Create Pivot Table From Finance Query CSV



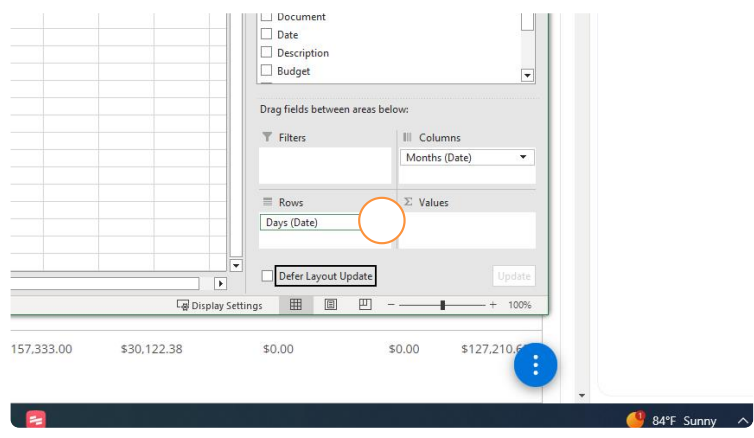
8 Click "Date"



9 Click "Remove Field"



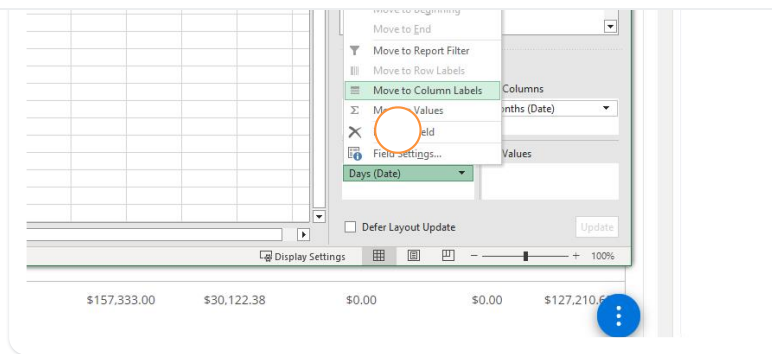
10 Click "Days (Date)"



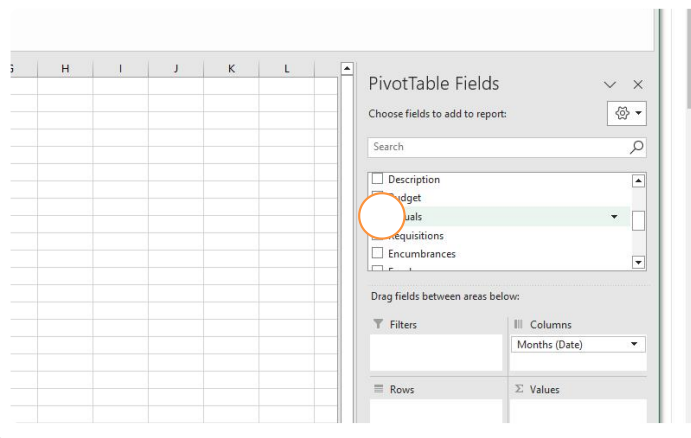
11 Click "Remove Field"



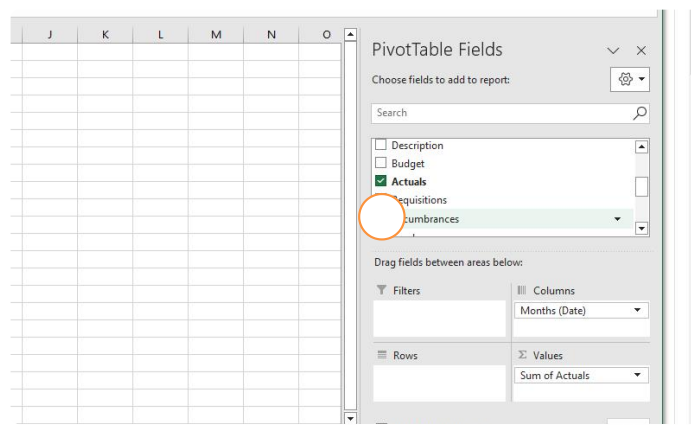
Create Pivot Table From Finance Query CSV



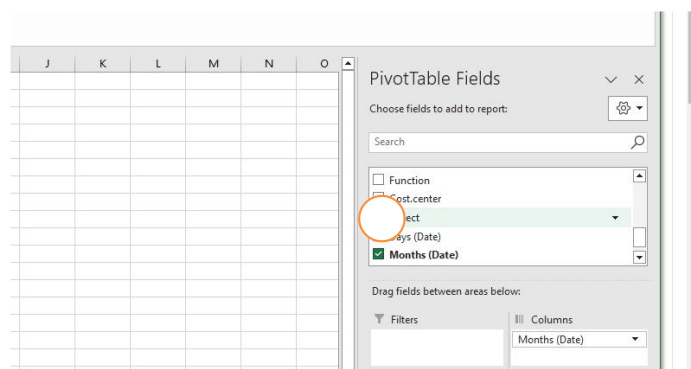
12 Click "Actuals"



13 Click "Encumbrances"



14 Click "Object"



Create Pivot Table From Finance Query CSV

15 Highlight all number figures and right mouse click

Sum of Actuals	Column Labels	Jul	Aug	Sep	Oct	Grand Total
(blank)		9.87	42634.24	30103.66	2759.15	113676.92
'54100			27233.16	31682.09	21121.44	80036.69
'54105						
'54200						
'54205			136.44	154.76	154.34	445.54
'54210			5416.63	4333.28	4333.28	14083.19
'54215			143.5	167	111.3	421.8
'54225			2987.38	3567.28	2378.84	8933.5
'54250			161.5	206.06	137.39	504.95
'54260			1951.85	2284.37	1497.18	5733.4
'55000						
'55030			147.81	134.4	126.14	137.31
'55060						

16 Click "Number Format..."

Sum of Actuals	Column Labels	Jul	Aug	Sep	Oct	Grand Total
(blank)		38179.87	42634.24	30103.66	2759.15	113676.92
'54100			27233.16	31682.09	21121.44	80036.69
'54105						
'54200						
'54205			136.44	154.76	154.34	445.54
'54210			5416.63	4333.28	4333.28	14083.19
'54215			143.5	167	111.3	421.8
'54225			2987.38	3567.28	2378.84	8933.5
'54250			161.5	206.06	137.39	504.95
'54260			1951.85	2284.37	1497.18	5733.4
'55000						
'55030			147.81	134.4	126.14	137.31
'55060						

17 Click "Accounting"

Sum of Actuals	Column Labels	Jul
(blank)		38179.87
'54100		27233.16
'54105		
'54200		
'54205		136.44
'54210		5416.63
'54215		143.5

18 Click "OK"

Sum of Actuals	Column Labels	Jul
(blank)		38179.87
'54100		27233.16
'54105		
'54200		
'54205		136.44
'54210		5416.63
'54215		143.5

[illegible]

19 This is one variation of creating a pivot table using data from the selected table/range. Pivot tables can be customized to your preference using the pivot fields.