Running a Query to Excel and Summarizing Data with a Pivot Table

- 1. Create the query. In this case it's the sample query WES_SFIS_TRAINING_QUERY_3A which returns the EmpIID, Name, Wes Majors, and Wesleyan Class Year.
 - a. The criteria for the major is: WES_MAJORS like ENGL%
 - b. The beginning of the result looks like this (with the IDs and Names obscured):

			1
iD	Name	Wes Majors	First D
1		ENGL	2010
2		ENGL	2010
3		ENGL	2011
4		ENGL	2011
5		ENGL	2011
5		ENGL	2010
7		ENGL	2011
8		ENGL,MUSC	2010
9		ENGL.MUSC	2011
10		ENGL	2012
11		ENGL	2012
12		ENGL	2012
13		ENGL	2010
14		ENGL	2010
15		ENGL	2012
16		ENGL	2011
17		ENO	2012

2. Run the query to Excel:

A.	E and	(¢)	0
(D)	Name	Wen Majors	Wenleyan Class
	-	ENDL	2010
		ENOL	5010
1		ENOL	5011
		ENGL	2011
		ENGL	2011
100		ENOL	3010
		ENGL	2011
		ENDLMUSC	2010
		ENGLIMUSC	2011
		ENOL	5012
		ENOL	5012
		ENOL	5012
1		ENOL	2010
18		ENOL	2010
		ENOL	2012
18		ENOL	2011
1		ENOL	2212
78		ENOL 1787	2012
		ENOL	5011
20		ENOL	2010
		ENDL	2010
10		ENOL	2010
P. C		FNN	Sam

- 3. You'll notice at the top the words "[Read Only] [Compatibility Mode]." In in order to work with this file, you need to either save it as an Excel file or copy it into a blank Excel file.
- 4. Important: Delete Row 1 (which contains the count of records from Query).

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PeopleSoft Query Reference

PeopleSoft 8.9; Query 8.48

- 5. Begin the pivot table as follows:
 - a. Click on any cell
 - b. Click on Insert
 - c. Click on Pivot Table



6. Click OK to accept that the pivot table will be placed in a new worksheet.

Create PivotTable		? 🔀
Choose the data that yo	ou want to analyze Inge	
<u>T</u> able/Range:	sheet1!\$A\$1:\$C\$154	
O Use an external da	ita source	
Choose Conn	ection	
Connection na	ne:	
Choose where you want	the PivotTable report to be placed	
💿 <u>N</u> ew Worksheet		
C Existing Worksheel	t	
Location:		1
	OK	Cancel

6. The new worksheet will look like this:



7. On the right, drag and drop ID, Wes Majors, and Wesleyan Class year into the sections at the bottom so that they appear as follows:

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PeopleSoft 8.9; Query 8.48

	t v
Choose fields to add	to report:
₩ID	
Name	
Wes Majors	
Drag fields between a	rreas below:
Drag fields between a	sreas below:
Drag fields between a V Report Filter	areas below: Column Labels Wesleyan Class 💌
Drag fields between a V Report Filter	areas below: Column Labels Wesleyan Class ▼
Drag fields between a V Report Filter Row Labels	areas below: ☐☐ Column Labels Wesleyan Class ▼ ∑ Values
Drag fields between a V Report Filter Row Labels Wes Majors	reas below: Column Labels Wesleyan Class ▼ Σ Values Count of ID ▼
Drag fields between a Report Filter Row Labels Wes Majors	areas below: Column Labels Wesleyan Class ▼ Σ. Values Count of ID ▼
Drag fields between a V Report Filter Row Labels Wes Majors	areas below: Column Labels Wesleyan Class ▼ Vesleyan Class Count of ID ▼

8. The left of the screen will now show a count of different English Majors combinations by class year.

10	A	B	C	D	E	F
1		195	22.1			
2						
3	Count of ID Co	olumn Labels 💌				
4	Row Labels 💌 🗂	<u> </u>	*****		<u> </u>	Grand Total
5	ENGL	27	39	34	1	101
6	ENGL, ENVS	2				2
7	ENGL, FGSS		1	1		2
8	ENGL, FILM	3	2			5
9	ENGL, FRST	2	2	6		10
10	ENGL, GOVT	2	1	2		5
11	ENGL HIST		2			2
12	ENGLITST		1	1		2
13	ENGL,MB&B			1		1
14	ENGL, MUSC	1	4			5
15	ENGL.NS&B		1	1		2
16	ENGL, PHIL	1				1
17	ENGL, PSYC	6		1		7
18	ENGL, RELI	1				1
19	ENGL, SOC	2				2
20	ENGL, SPAN			1		1
21	ENGL THEA	2	1	1		4
22	Grand Total	49	54	49	1	153
23	Contraction of Cardination			- and -		