

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 EmplID, 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):

ID	Name	Wes Majors	Wesleyan Class Year
1	[Redacted]	ENGL	2010
2	[Redacted]	ENGL	2010
3	[Redacted]	ENGL	2011
4	[Redacted]	ENGL	2011
5	[Redacted]	ENGL	2011
6	[Redacted]	ENGL	2010
7	[Redacted]	ENGL	2011
8	[Redacted]	ENGL,MUSC	2010
9	[Redacted]	ENGL,MUSC	2011
10	[Redacted]	ENGL	2012
11	[Redacted]	ENGL	2012
12	[Redacted]	ENGL	2012
13	[Redacted]	ENGL	2010
14	[Redacted]	ENGL	2010
15	[Redacted]	ENGL	2012
16	[Redacted]	ENGL	2011
17	[Redacted]	ENGL	2010

2. Run the query to Excel:

ID	Name	Wes Majors	Wesleyan Class
159			
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2011
[Redacted]	[Redacted]	ENGL	2011
[Redacted]	[Redacted]	ENGL	2011
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2011
[Redacted]	[Redacted]	ENGL,MUSC	2010
[Redacted]	[Redacted]	ENGL,MUSC	2011
[Redacted]	[Redacted]	ENGL	2012
[Redacted]	[Redacted]	ENGL	2012
[Redacted]	[Redacted]	ENGL	2012
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2012
[Redacted]	[Redacted]	ENGL	2012
[Redacted]	[Redacted]	ENGL,ITST	2012
[Redacted]	[Redacted]	ENGL	2011
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2010
[Redacted]	[Redacted]	ENGL	2010

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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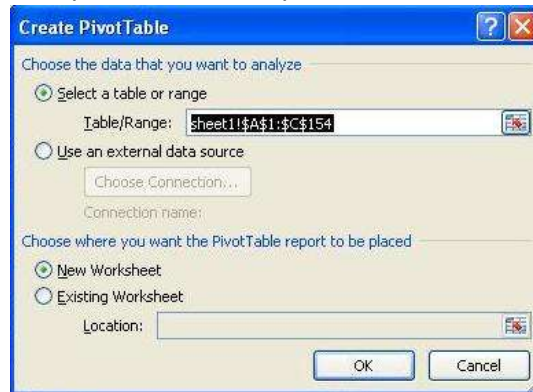
PeopleSoft Query Reference

PeopleSoft 8.9; Query 8.48

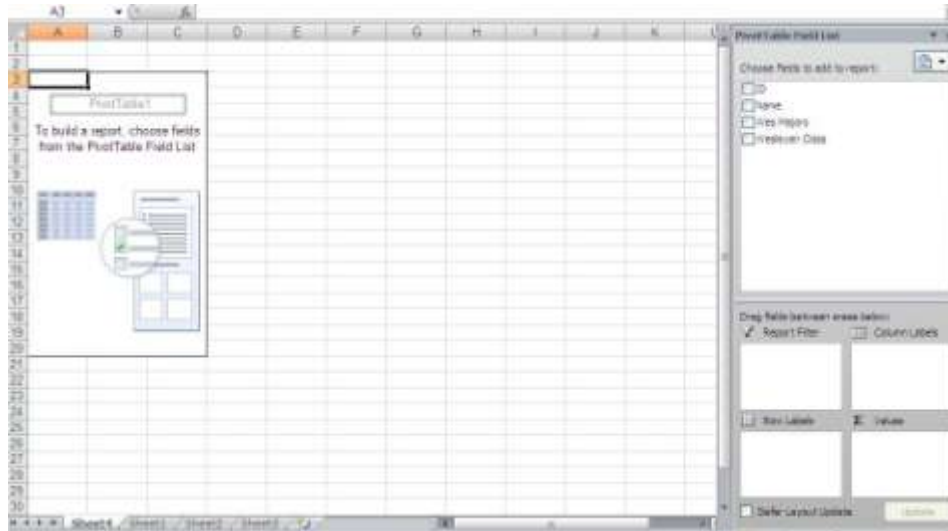
5. Begin the pivot table as follows:
 - a. Click on any cell
 - b. Click on Insert
 - c. Click on Pivot Table



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

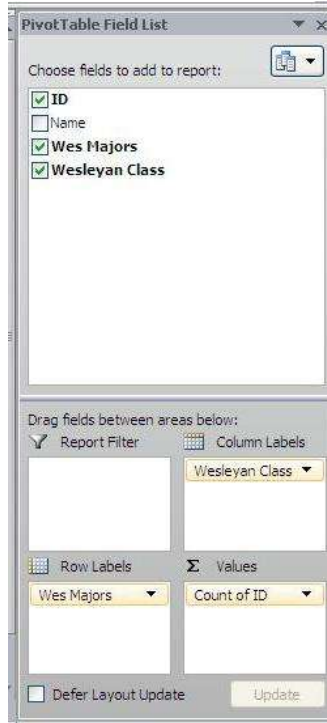


6. The new worksheet will look like this:



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

	A	B	C	D	E	F
1						
2						
3	Count of ID	Column Labels				
4	Row Labels					Grand Total
5	ENGL	27	39	34	1	101
6	ENGL ENV5	2				2
7	ENGL.FGSS		1	1		2
8	ENGL.FILM	3	2			5
9	ENGL.FRST	2	2	6		10
10	ENGL.GOV7	2	1	2		5
11	ENGL.HIST		2			2
12	ENGL.ITST		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						