

OBI Export Reports and Pivoting in Excel

The OBI *Export* reports were designed for exporting to Excel so users could summarize and format reports to their own needs. This document is meant to be an intro to pivots in Excel, and only covers creating a basic pivot report. To learn more about what is possible in Excel, there are some great tutorials on the web. YouTube has all sorts of videos that go through using Excel to its full potential.

Before You Export

Before you export from OBI to Excel, you'll want to make sure that you have the columns necessary for your data analysis. To learn more about customizing your OBI report please see the following documentation that is available on the *Help* tab in OBI as well as on the IMSS web site.

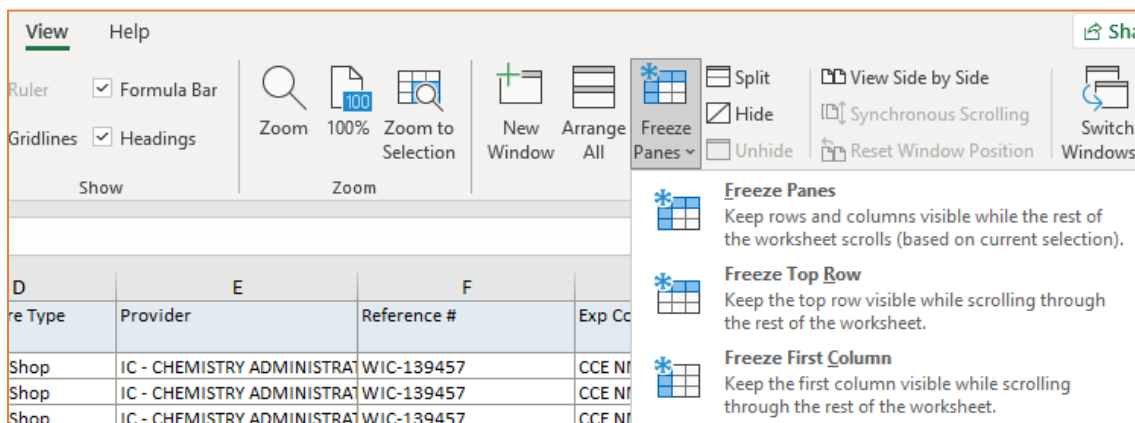
1. Quick Guides: *Customizing Reports and Saving Parameters*
2. Tip of the Day: *Customizing Your Report*

TIP: Make sure you go through the *Tip of the Day* before you get started because this short document provides tips that will make your effort a little bit easier.

After You Export

After you open the export of the report in Excel, you may want to format the worksheet to make it a little easier to use. For example, you may want to:

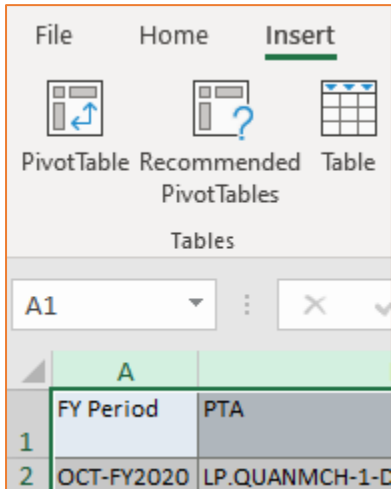
1. Remove the report headers so that you have the column headers as your first row in Excel.
2. Use *Control A* (or click on the little triangle just to the left of Column A and above Row 1) to highlight all of the cells within the worksheet, and format the data, e.g., change the size of the font, adjust column widths, remove wrapping text, etc.
3. By clicking on *View* in the Excel menu at the top, you can make the header row stay in place when you scroll by selecting *Freeze Panes* and then selecting *Freeze Top Row*.
 - a. The row that is showing at the top of the worksheet is that one that will “freeze,” so make sure that the header row is showing.



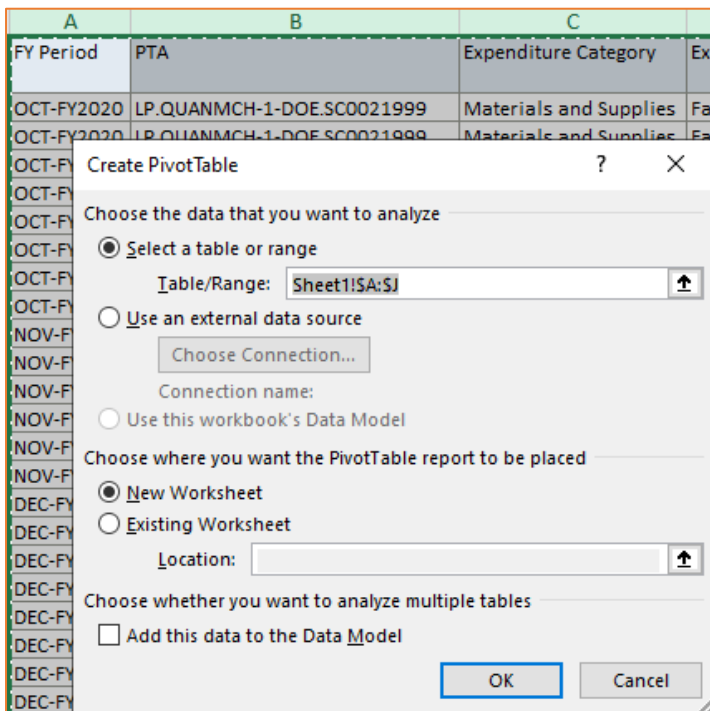
Creating the Pivot Table

Now that your worksheet is formatted the way you like.

1. Highlight the columns of the report.
2. Click on *Insert* and choose *Pivot Table* (it's all the way to the left).

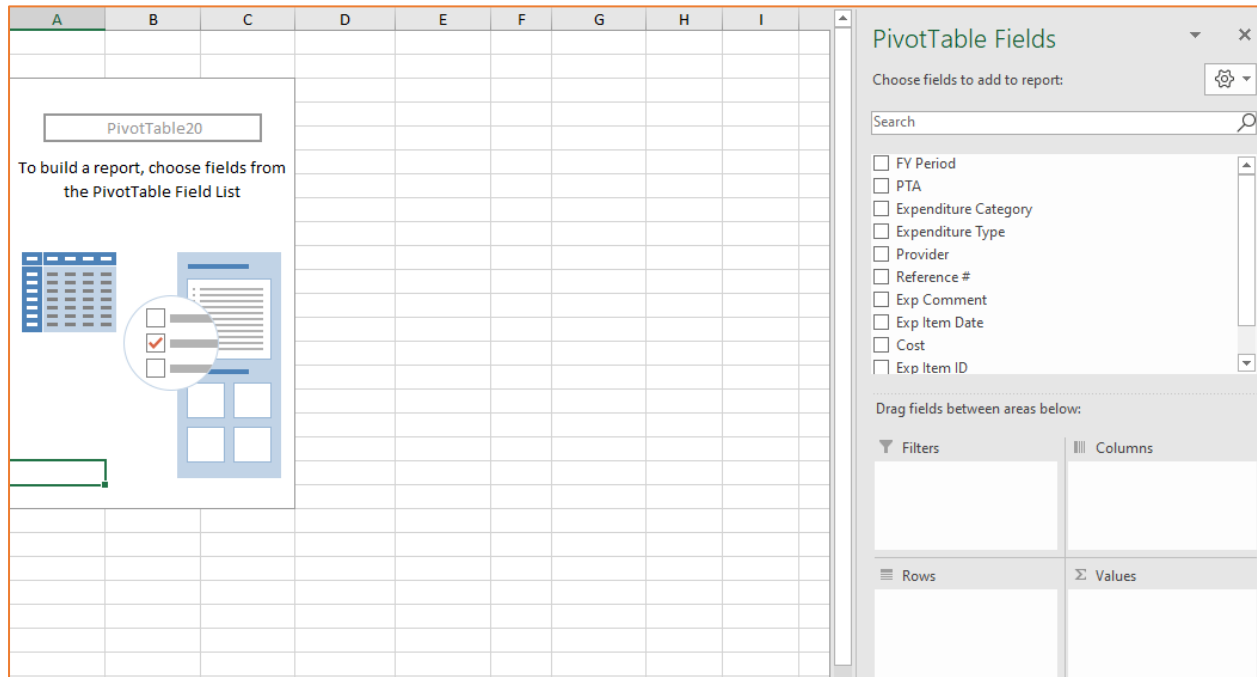


3. A little window will open. The top half shows the worksheet and cells that you have selected, and the bottom half lets you choose where to put the pivot table. *New Worksheet* is a good choice while you are learning the pivot functionality.
4. Click *OK* after you've made your selection.



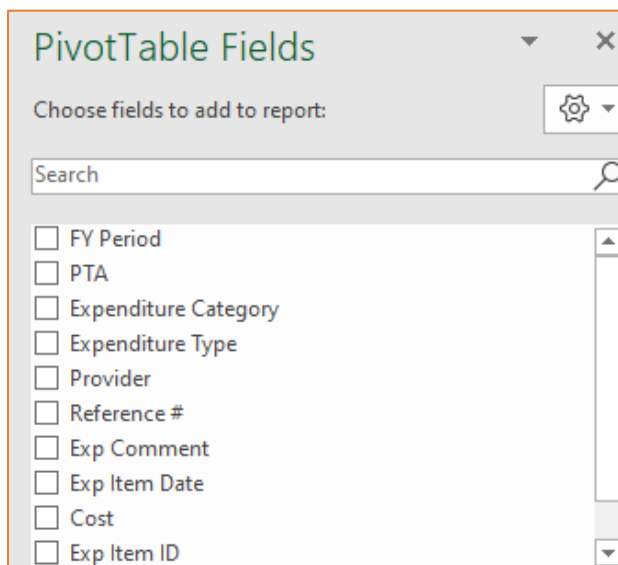
Modifying the Pivot Table

Clicking on the *OK* button will take you to the worksheet in which you can determine which columns to include, what numbers to analyze, etc.

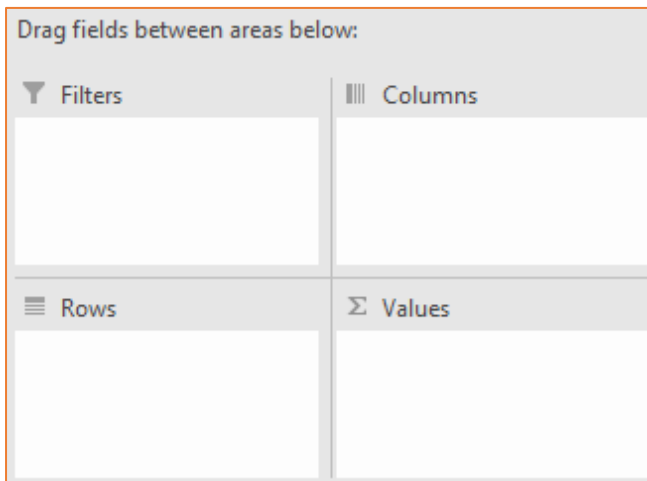


There are three sections on this worksheet:

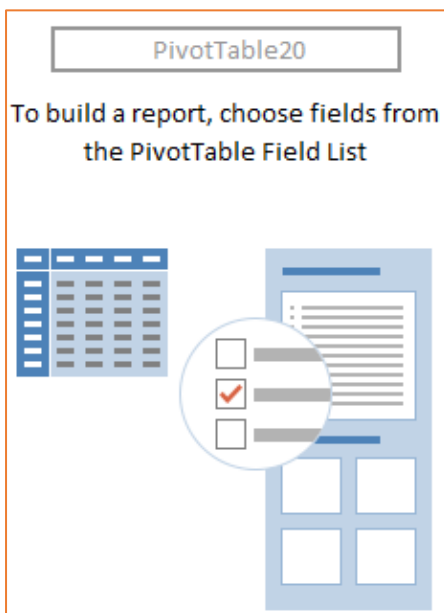
1. The top right corner lists the fields you can include in your pivot report.



- The lower right section is where you drag fields to determine your filters, the rows to group data on the left of the report, the columns to go across the top, and the values to analyze.



- The left side is where your report will appear as you start dragging fields down from the top right section to the lower right section.



The best way to learn how to create the pivot report is to start doing it. Below is an example in which the costs (dragged into *Values*) are grouped by PTA (dragged into *Rows*) over time with the FY Period (dragged into *Columns*) going across the top.

Sum of Cost	Column Labels	DEC-FY2020	NOV-FY2020	OCT-FY2020	Grand Total
Row Labels					
LP.CHEMBOND-1-NSF.2199999		280.83	5.29	-3.41	282.71
LP.PEACE-1-ONR.PEACENBL		497.85	32.91	153.9	684.66
LP.QUANMCH-1-DOE.SC0021999		171.53	253.61	364.35	789.49
Grand Total		950.21	291.81	514.84	1756.86

If you drag another field into the *Rows* section, e.g., *Expenditure Type*, you will see the costs by PTA for each Expenditure Type used.

Sum of Cost	Column Labels	DEC-FY2020	NOV-FY2020	OCT-FY2020	Grand Total
LP.CHEMBOND-1-NSF.2199999		280.83	5.29	-3.41	282.71
Supplies - Allocable		280.83	5.29	-3.41	282.71
LP.PEACE-1-ONR.PEACENBL		497.85	32.91	153.9	684.66
Facilities		79.4	36		115.4
Facilities/Shop		278.02			278.02
Stockroom Usage		61.33			61.33
Supplies - Allocable			-3.09	153.9	150.81
Transportation-Usage		79.1			79.1
LP.QUANMCH-1-DOE.SC0021999		171.53	253.61	364.35	789.49
Facilities/Shop			154.39	364.35	518.74
Supplies - Allocable		171.53	99.22		270.75
Grand Total		950.21	291.81	514.84	1756.86