

# How to Use Ad Hoc Reports

## Export Data to Excel Pivot Table: Lesson 3

**OVERVIEW:** Create a report that lists all vendors along with past due invoices and use the data in an Excel Pivot Table. (NOTE: Use I.E. when creating Ad Hoc Reports.)

### Use the Following Steps to Create and Export a Set of Data

1. Click inside the list of entities
  - a. Locate **APInvoice** entity and move to the design area
  - b. Place a checkmark beside **AllPaid**
  - c. Place a checkmark beside **DueDate**
  - d. Place a checkmark beside **Total**
2. Click **Data Grid**
  - a. Click **Refresh**
  - b. Enter a name for your report in the **Report Name field**

* Report Name: AP Outstanding Invoices
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  - c. Click the **Save** icon
3. Now we need to limit the list to all past due invoices
  - a. Enter today's date in the **Due Date** field using the calendar icon
  - b. Tab to the filter icon and choose **LessThanOrEqualTo**
  - c. Make sure that the All Paid checkbox is empty and then click the Filter icon and choose **EqualTo**
  - d. Click the **Save** icon
4. Click **Query Builder**
  - a. From the bottom of the APInvoice table, locate and click **APVendor 1:1 APVendor** (Note: some versions of Chrome does not support this selection. Just select the entity from the main entity list)
  - b. From the bottom of the APVendor table, locate and click on **CorePerson 1:1 CorePerson** (Note: APVenodor table is needed to limit the list of names to vendors only. We will not use any of the fields in this table)
  - c. Place a checkmark beside **FullName** in the CorePerson table
5. Click **Data Grid**
  - a. Click **Refresh**
  - b. Click the **Save** icon

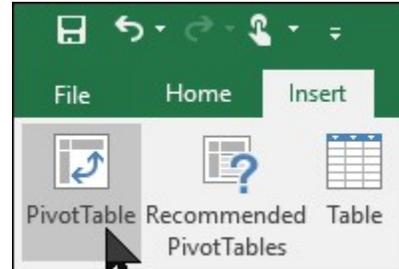
## Use the Following Steps to Create a Pivot Table with Pivot Chart

1. Click on **Data Grid**
2. Click the **Open** icon and choose AP Outstanding Invoices or a report that has the needed information
3. Verify that the filters are producing the needed information.
4. When ready, click the export to **.CSV** icon

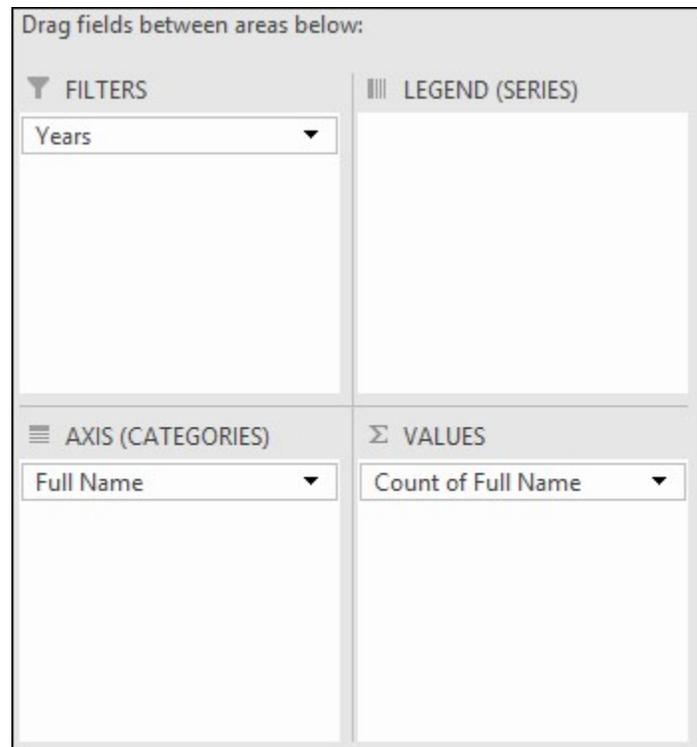


5. Open the downloaded file in Excel
6. Perform the following steps in Excel

- a. Make sure that the entire data set is selected, or highlighted
- b. Click the Insert link on the ribbon bar
- c. Click the Pivot Table icon
- d. Click the **OK** button on the Create Pivot Table modal



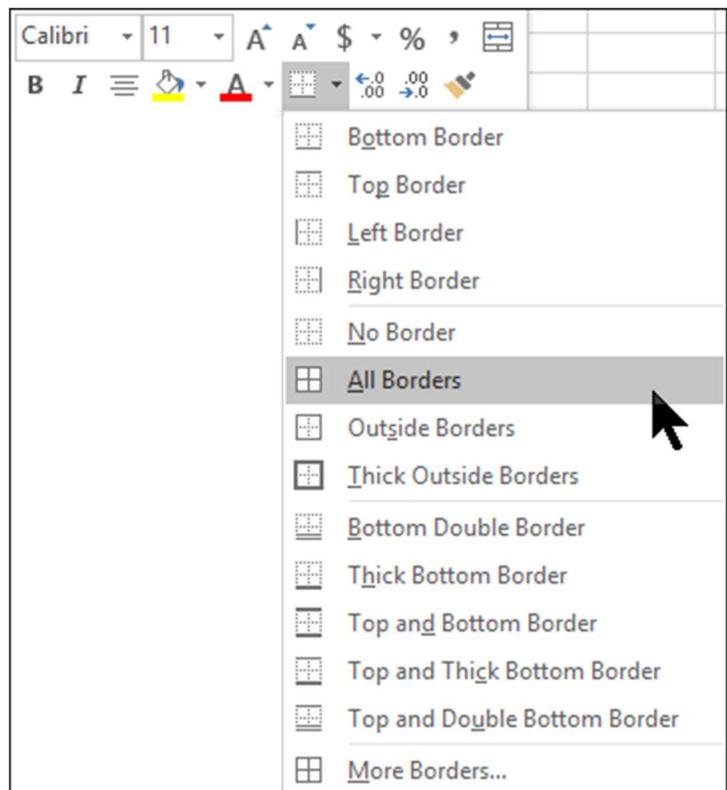
- e. Click and Drag **Full Name** into the Axis (Categories) box
- f. Click and Drag **Full Name** into the Values box
- g. Click and drag **Date** into the Filters area



- h. (Optional) Select entire list including the **Row Labels** header and Grand Total row

Row Labels	Count of Full Name
Alfred Johnson	1
AT&T	1
Brooks Canfield	1
Carl Bishop	1
David Ellis	1
Eric Garrison	1
Germantown Commissary	1
Guitar Center	1
Hampton Inn	1
Jessica Ace - Jess	9
Kroger	1
Lifeway Christian Stores	1
Matt Williams	25
Mike Gold - Mikey	1
Office Depot	1
Subway	1
<b>Grand Total</b>	Count of Full Name

- i. Right-click inside the selected data and choose **All Borders** from the top section of options



- j. With the data still selected as shown in step 6.h. above, click Insert on the Excel Ribbon bar
- k. Click on PivotChart icon
- l. Choose the Pie Chart

m. Click and Drag the chart to a favorable position.

