

Getting the Most Out of Your TDM Data Pivot Tables and Charts--

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Example 1: Number of TDM Meetings over Time DETAILS FOR EXCEL 2000 / XP (2002)

REMINDER: The data export for UCB contains child- and family-level identifiers. Specifically, qry_010_ExportMeetChild includes FamilySerial, ChildCntNo, and ChildCaseNo; qry_020_ExportRefNo includes RefNo; and qry_030_Meet includes FamilySerial.

When using for custom reporting, as in these examples, (1) Delete the IDs (or worksheets) or (2) Password-protect the file using WinZip before sending over the internet.

Instructions for password protecting the file using WinZip are available in the Self Evaluation/Reporting section (TDM CA Quarterly Data Extract subsection) of the TDM support page at: <http://cssr.berkeley.edu/tdm/#reporting>

Note: The examples below are from Excel 2000. In Excel XP, the appearance of the pivot table toolbar, field list, and data display differ slightly, however, these steps will produce the same product.

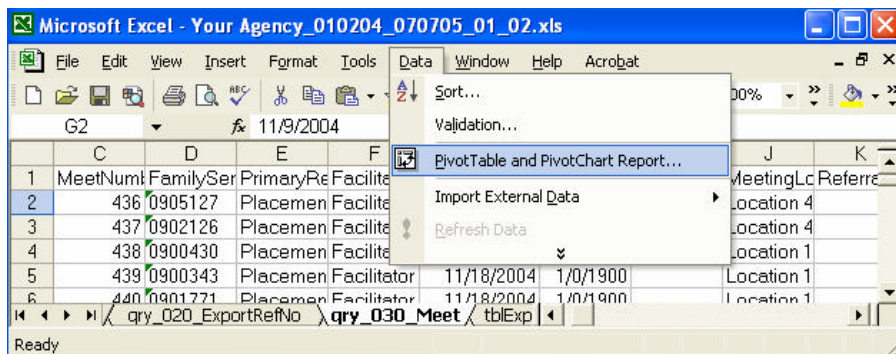
With a little practice (or previous experience), you can use pivot tables to summarize and display data. For example, suppose you would like to look at the number of meetings you hold per month:

1. Select Data Source and Create Pivot Table

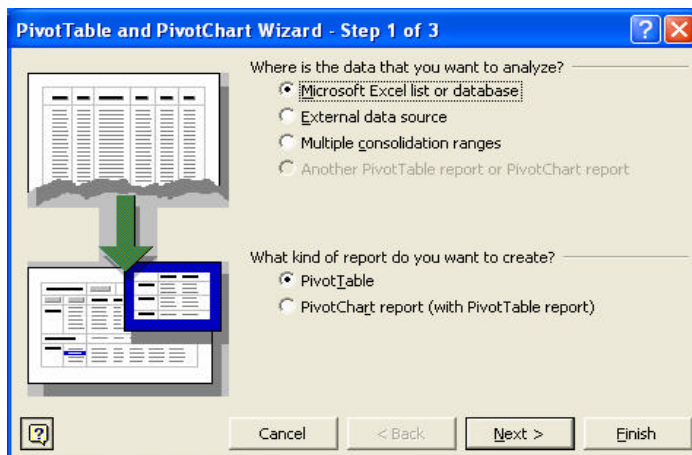
Click on the tab 'qry_030_Meet'.

Select any cell in the list of data values.

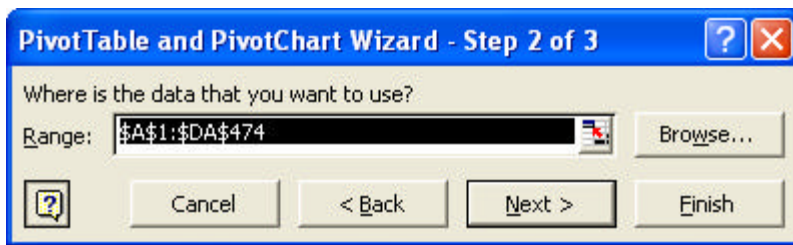
Click 'Data' > 'PivotTable and PivotChart Report'.



Follow PivotTable and PivotChart Wizard default options:



Click 'Next'.

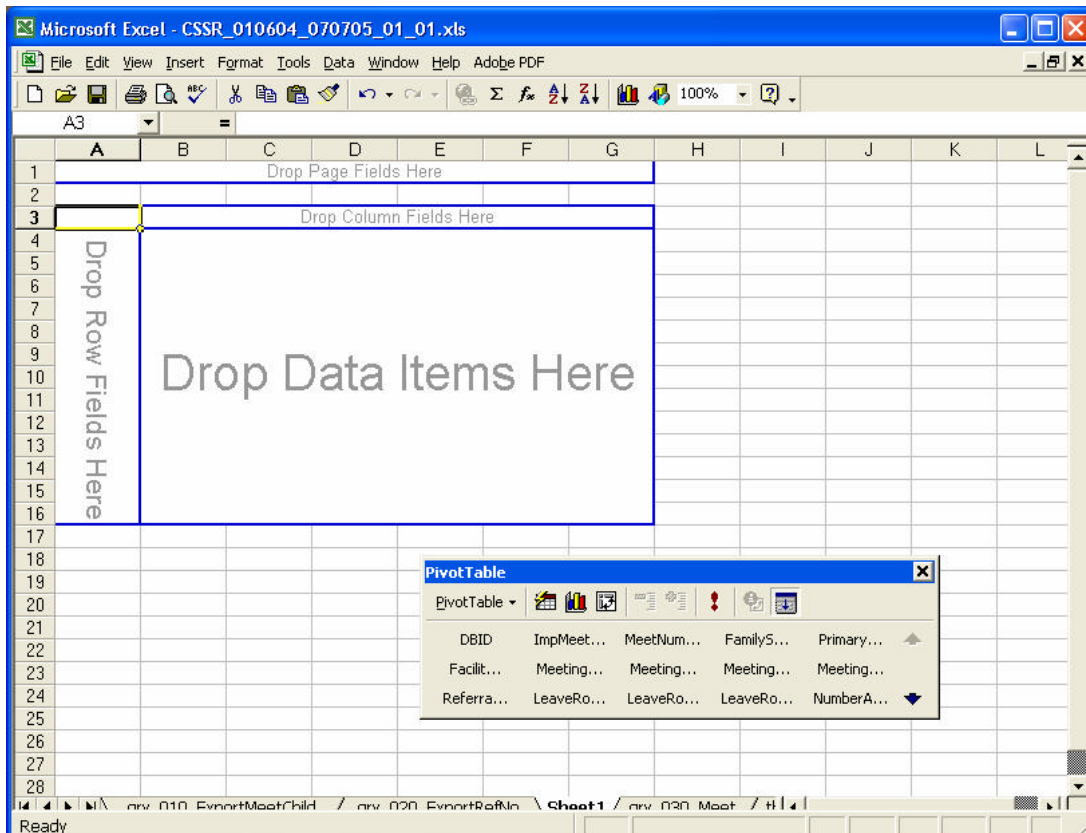


Click 'Next'. Note: Data range will default to include all records.

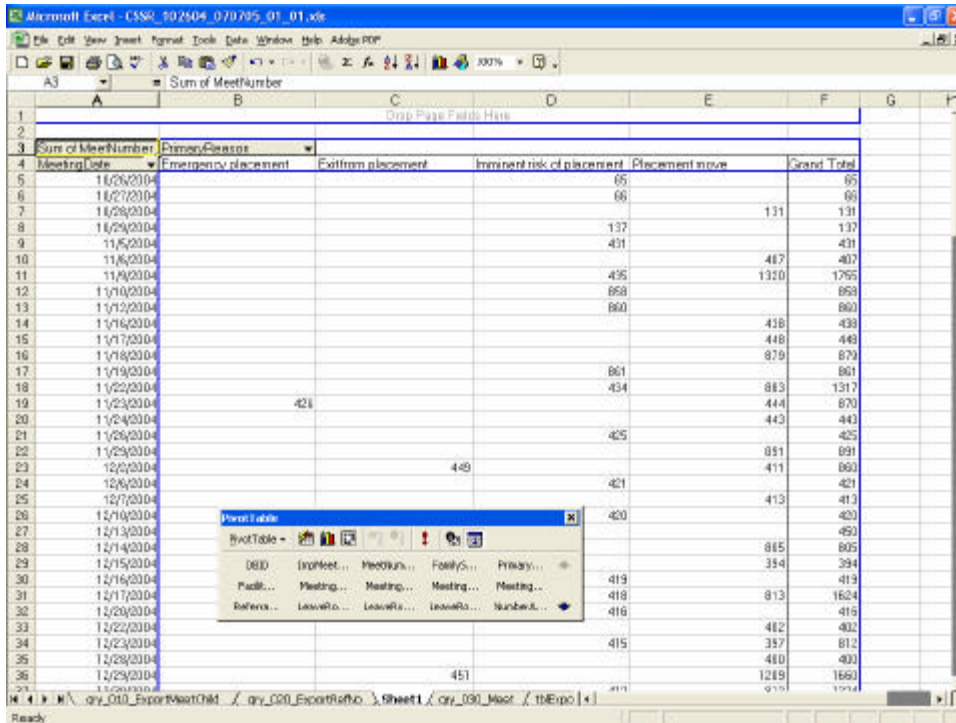


Click 'Finish'.

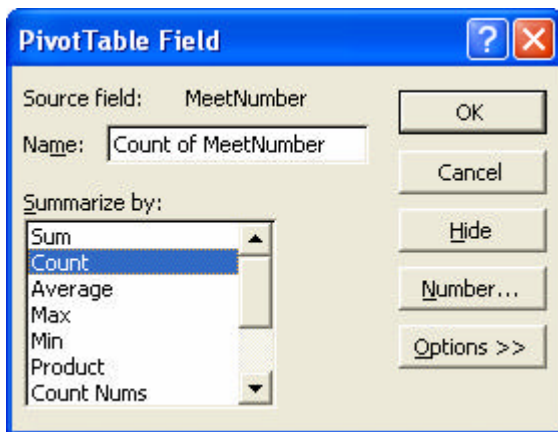
You can then summarize your TDM data using the tools available through MS Excel Pivot Table feature:



Drag and drop 'MeetNumber' from Pivot Table Field List Dialog to Data Items area of Pivot Table. Since the 'MeetNumber' is a numeric identifier, Excel defaults to the **sum** of 'MeetNumber'.



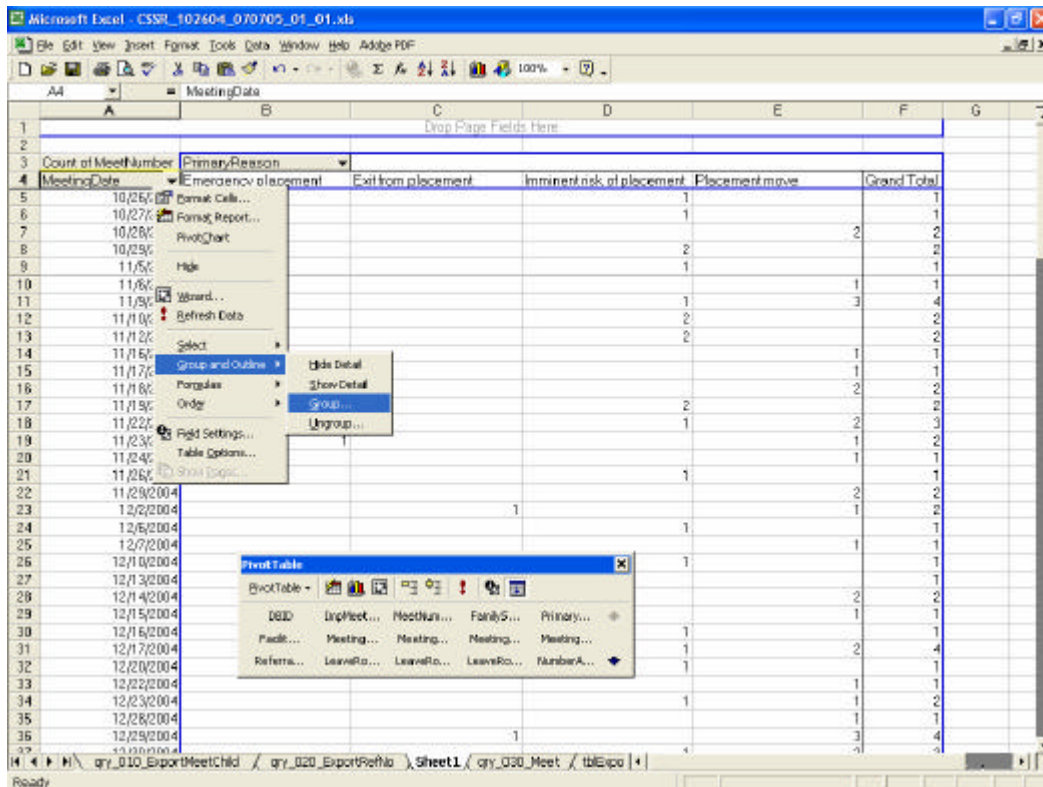
Select 'Sum of MeetNumber' in the Pivot Table. Right click or, using the Pivot Table toolbar, select 'Field Settings'. Change 'Summarize by' to 'Count'.



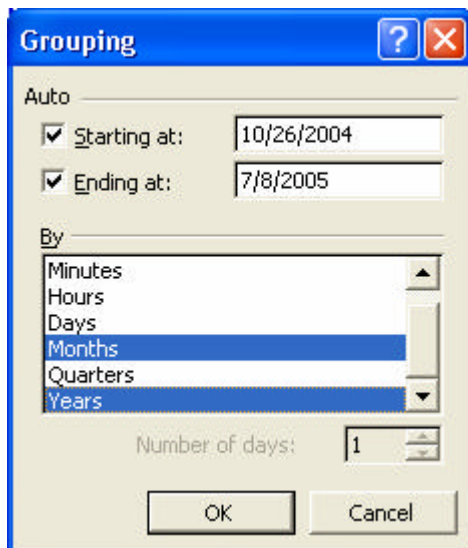
Click 'OK'

3. Apply Appropriate Groupings

Right click on the MeetingDate field in the Pivot Table.
Select 'Group and Outline' > 'Group'.

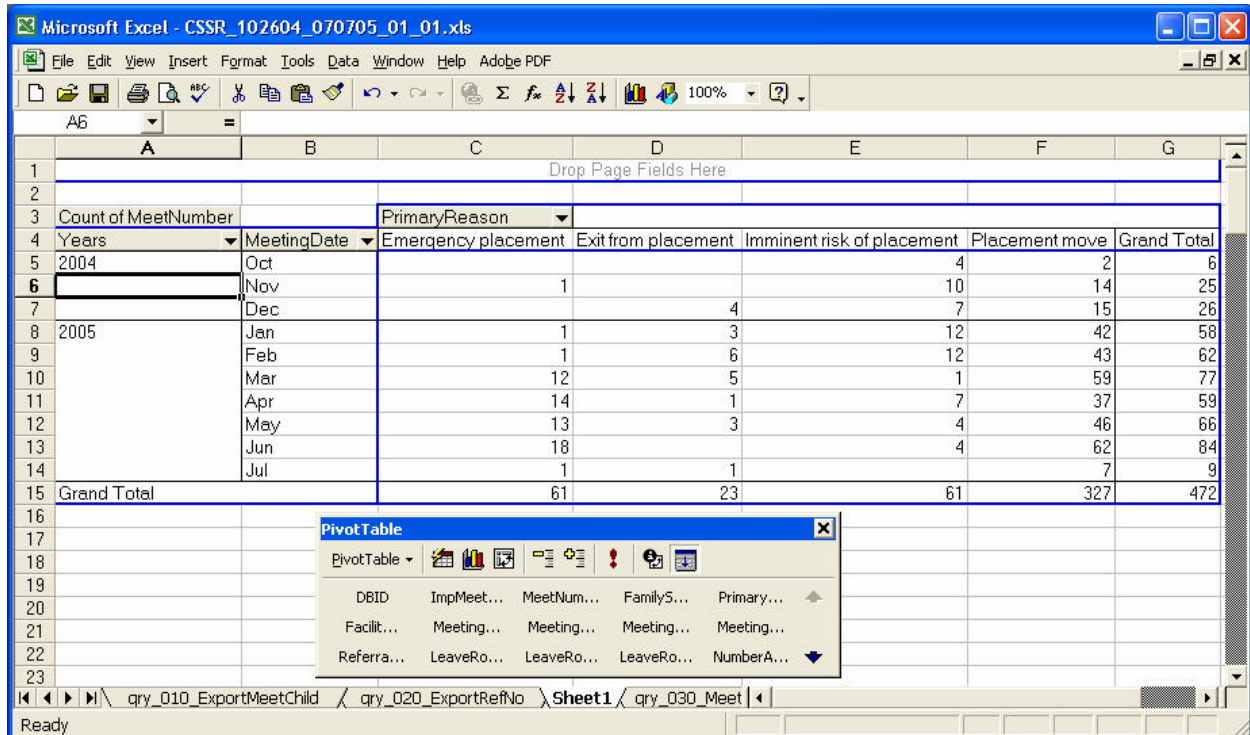


Since 'MeetingDate' is a date field, Excel automatically offers grouping options. Select 'Months' and 'Years':



Click 'OK'.

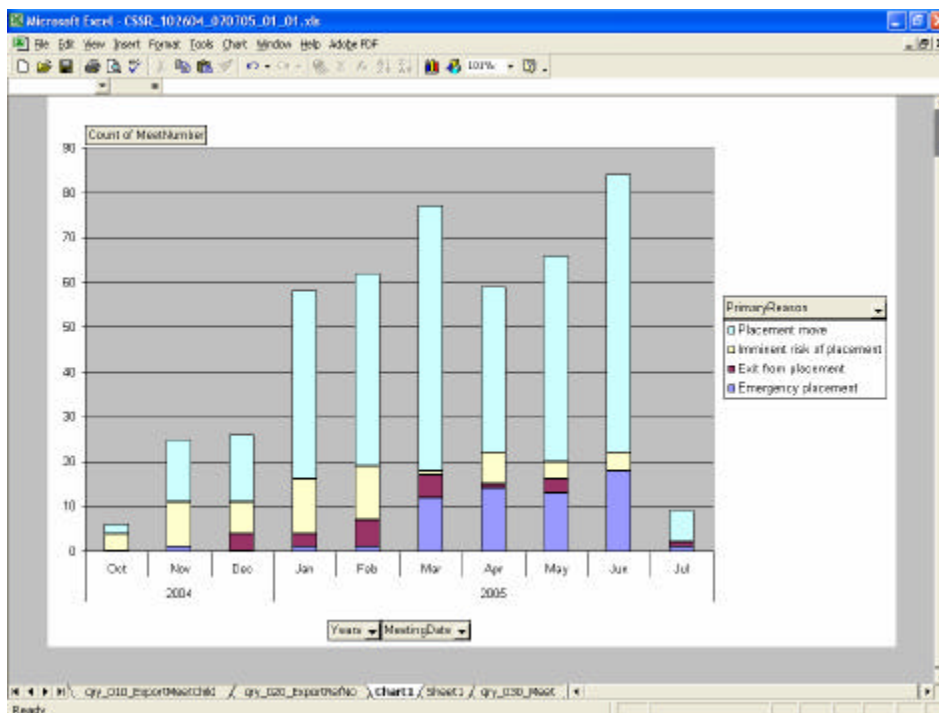
The 'MeetingDate' field is collapsed into year and month groupings.



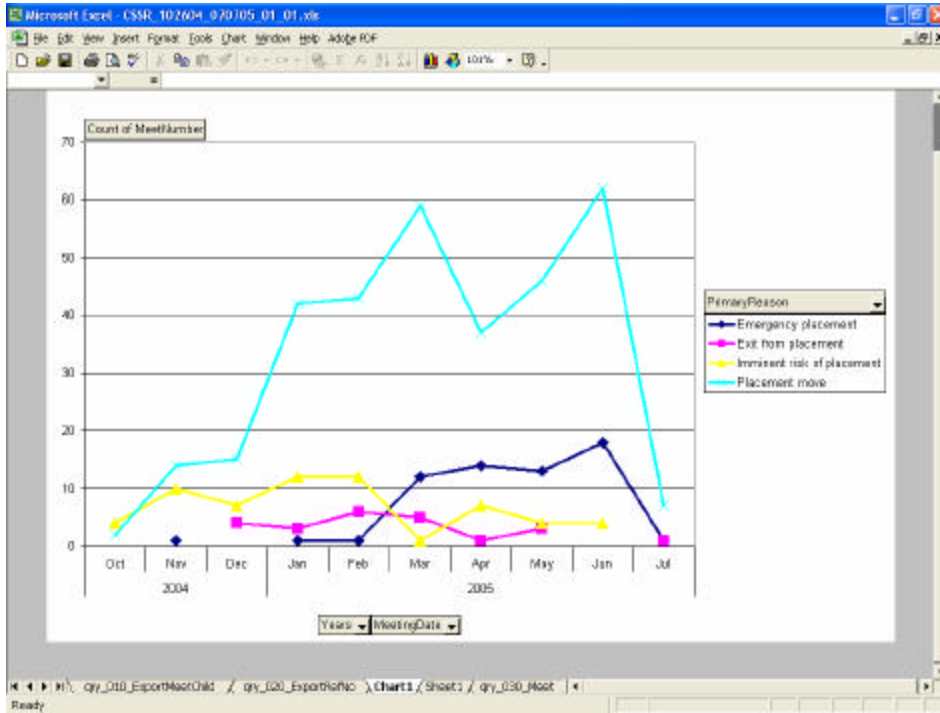
You now have a cross tabulation of Number of meetings by year and month BY Primary Reason for Meeting.

4. Modify or Chart Your Pivot Table for Presentation

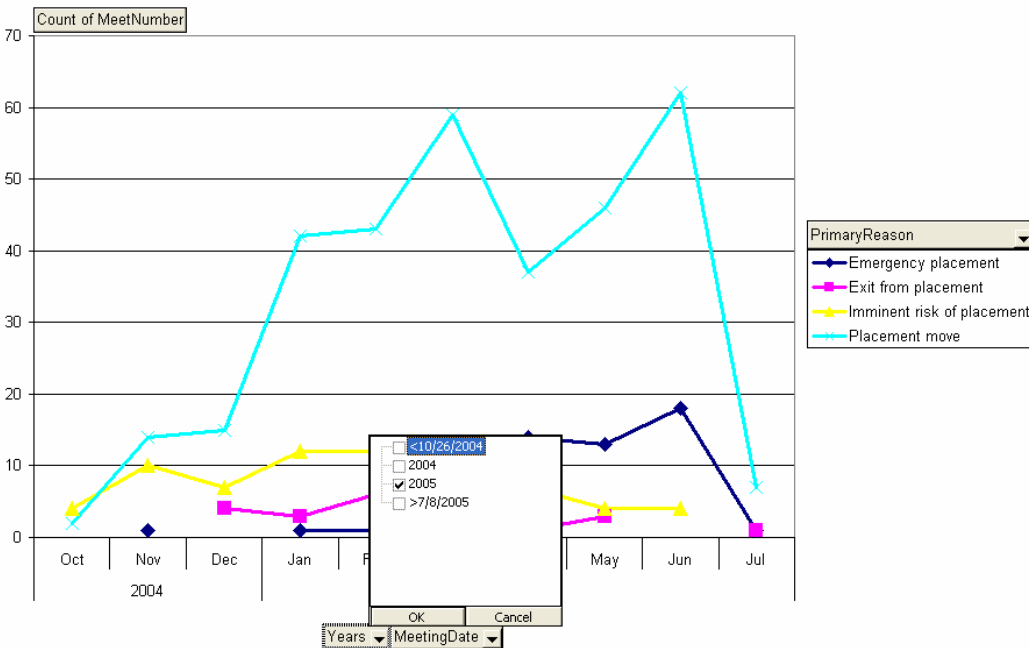
Clicking the Chart Wizard icon on the Pivot Table toolbar creates a chart:



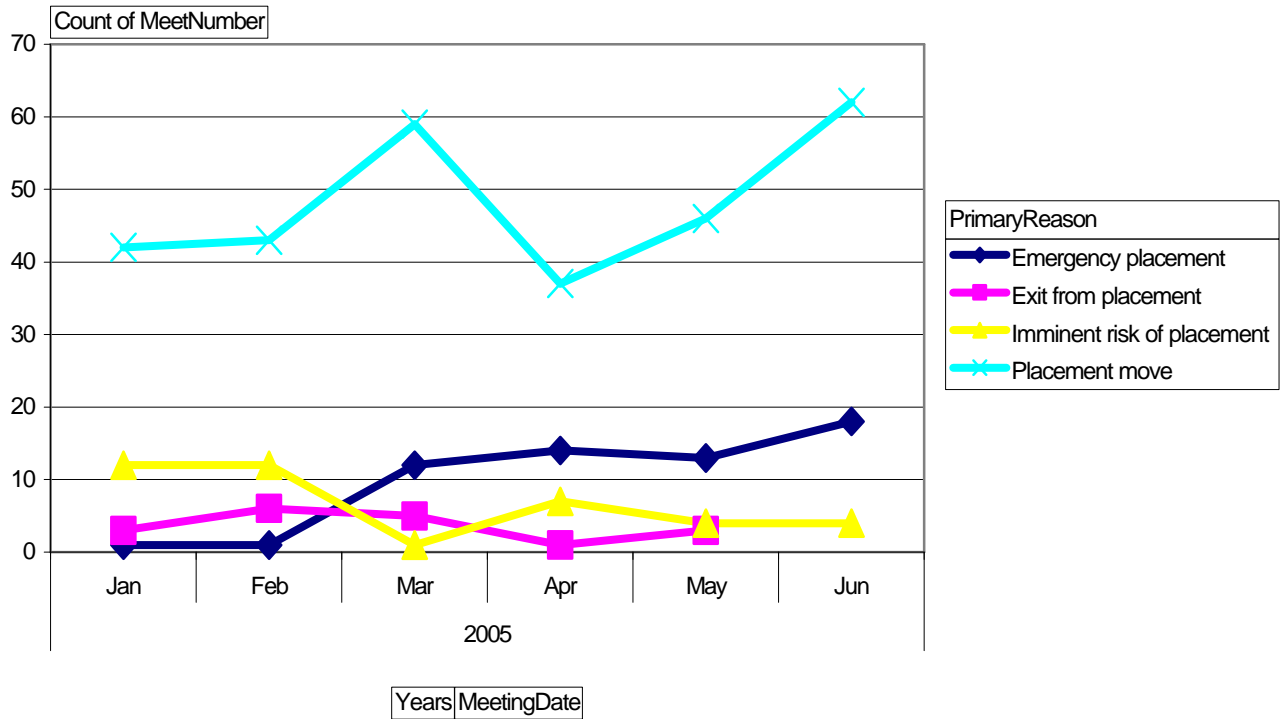
You can right click on the chart and click Chart Type, Format Plot Area, Chart Options, etc. to modify the chart to match your display preferences:



You can also use the Pivot Chart drop down menus to filter the data displayed (for example, to focus on a particular time period, as below: Jan 2005 to Jun 2005):



[You would additionally use the 'MeetingDate' dropdown in this example to uncheck 'Jul'.]



Or to focus on Front End (Imminent risk of placement and Emergency placement) meetings only:

