

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

Example 1: Number of TDM Meetings over Time

QUICK REFERENCE FOR EXCEL 2000 / XP (2002)

REMINDER: The data export for UCB contains child and family level identifiers. When using for custom reporting, please delete these IDs or password protect the file using WinZip before sending over the internet. For details, see Example 1: Full Instructions at: <http://cssr.berkeley.edu/tdm/#reporting>

Suppose you would like to look at the number of TDM meetings held in your county by month (and by the primary reason for the meeting):

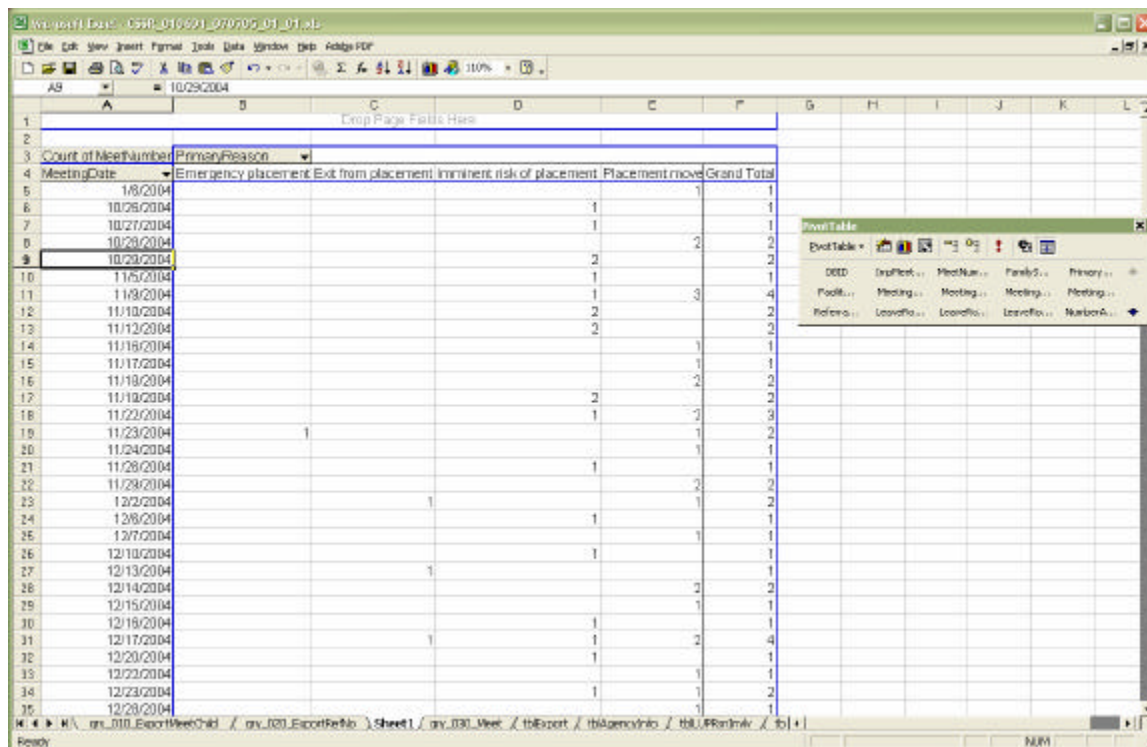
1. Select Data Source and Create Pivot Table

Working with TDM data exported to Excel:

- 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.
- You can then summarize your TDM data using the MS Excel Pivot Table feature.

2. Construct Pivot Table Rows and Columns; Add Data

- Drag and drop 'MeetingDate' from Pivot Table Field List Dialog to Row Field area.
- Drag and drop 'PrimaryReason' from Pivot Table Field List Dialog to the Column Field area.
- 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'.

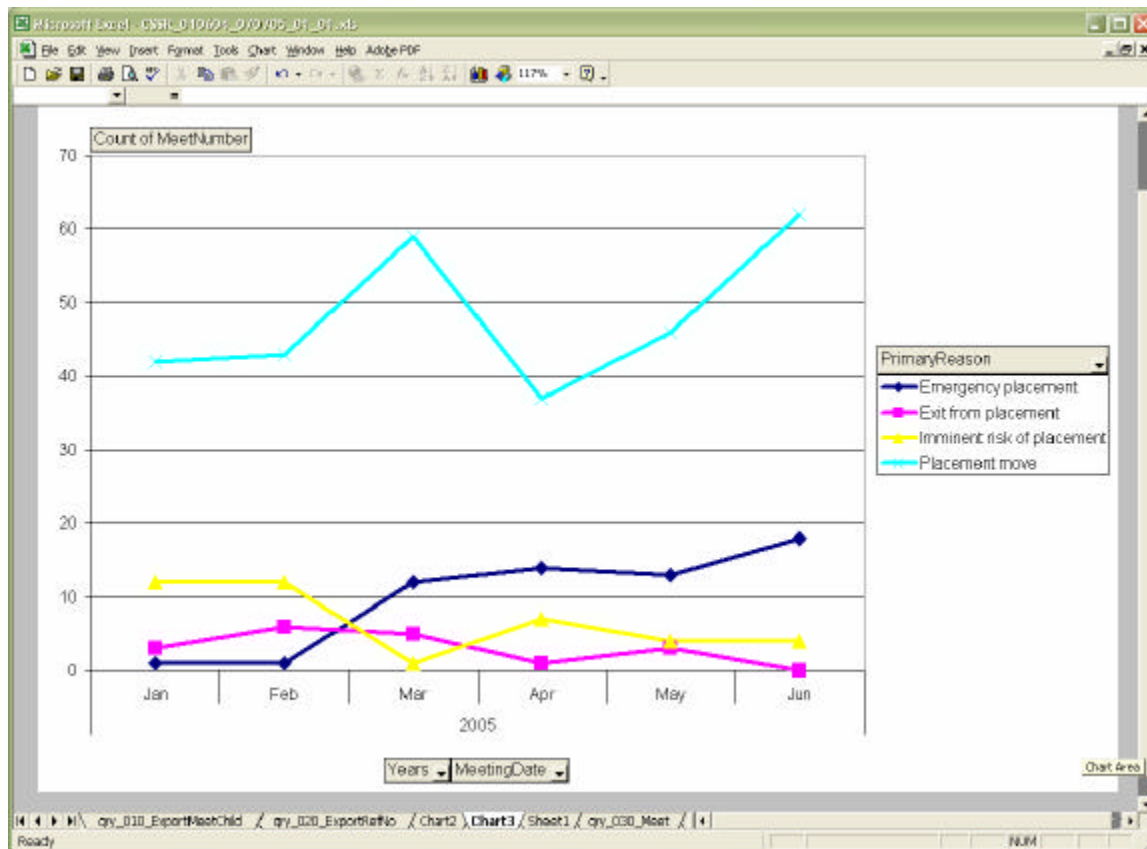


3. Apply Appropriate Groupings

- 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'.
- 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.
- For example, you can focus on Front End (Imminent risk of placement and Emergency placement) meetings only.
- 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):



A detailed version of this document is available on the TDM support website in the Self Evaluation /Reporting section at:
<http://cssr.berkeley.edu/tdm/#reporting>