Pivot/Chart

PURPOSE

This document shows the procedures on how to access and create pivot/ chart in CS Lucas system

WHY IS THIS IMPORTANT?

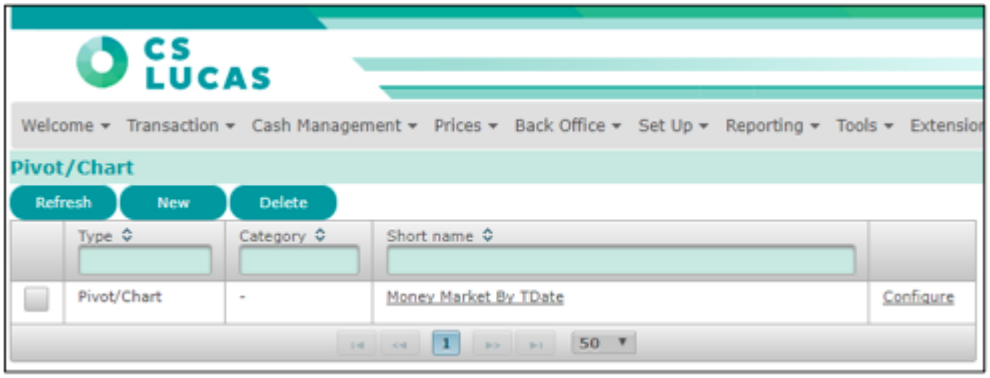
This allows user to create pivot table or charts for management reporting purposes.

PROCEDURE

1. Pivot/ Chart is a third-party tool by Flexmonster that CS Lucas embedded into CS Lucas system to do pivoting and charting. It is similar to Excel tool which you can create pivot table/ charts. A license is required to use this feature. Please contact CS Lucas if you wish to use this feature.

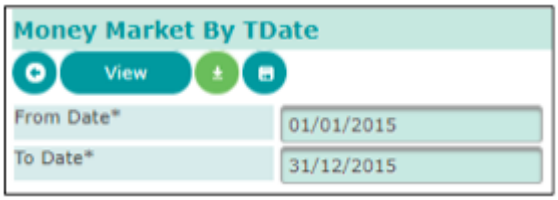
2. To access Pivot/ Chart, select Reporting > Pivot/ Chart from main menu.

3. The Pivot/ Chart screen is displayed below.



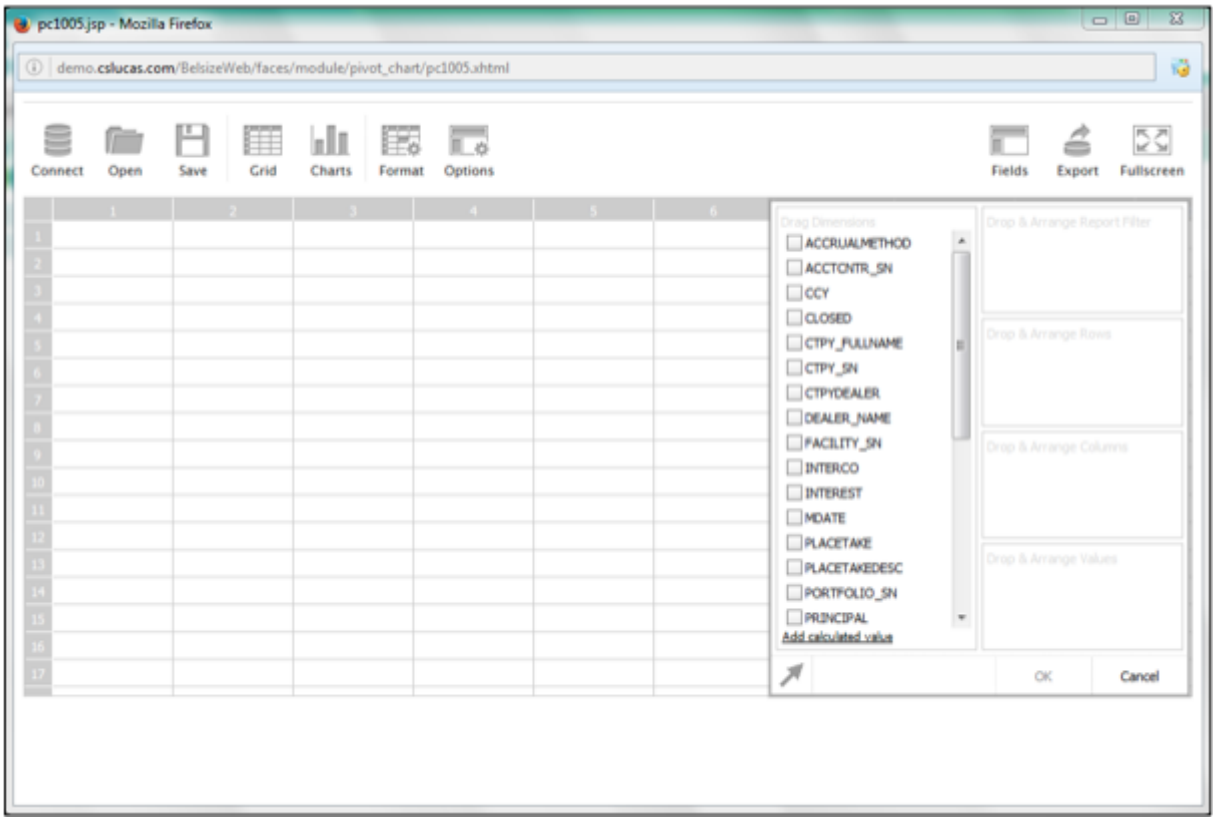
4. This screen will contains the required data queries that can be used for creating pivot table/ charts. The data query is written by CS Lucas.

5. To view the data query, click on the Short Name. In this example, Money Market By TDate.

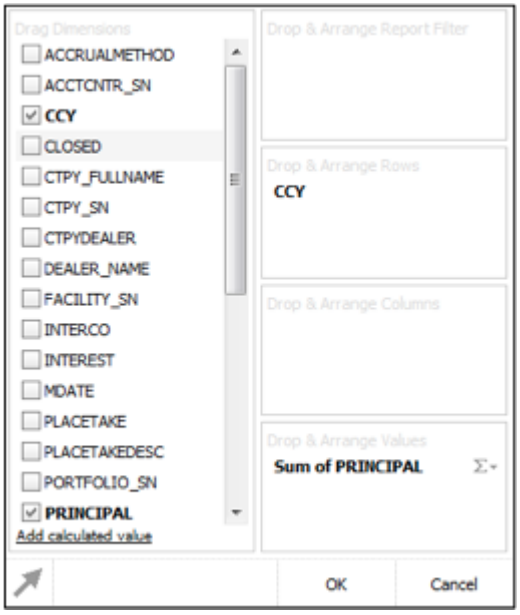


6. Select the appropriate date range and click 

. In this example, the data is printed for one year. A new window will be opened as below.

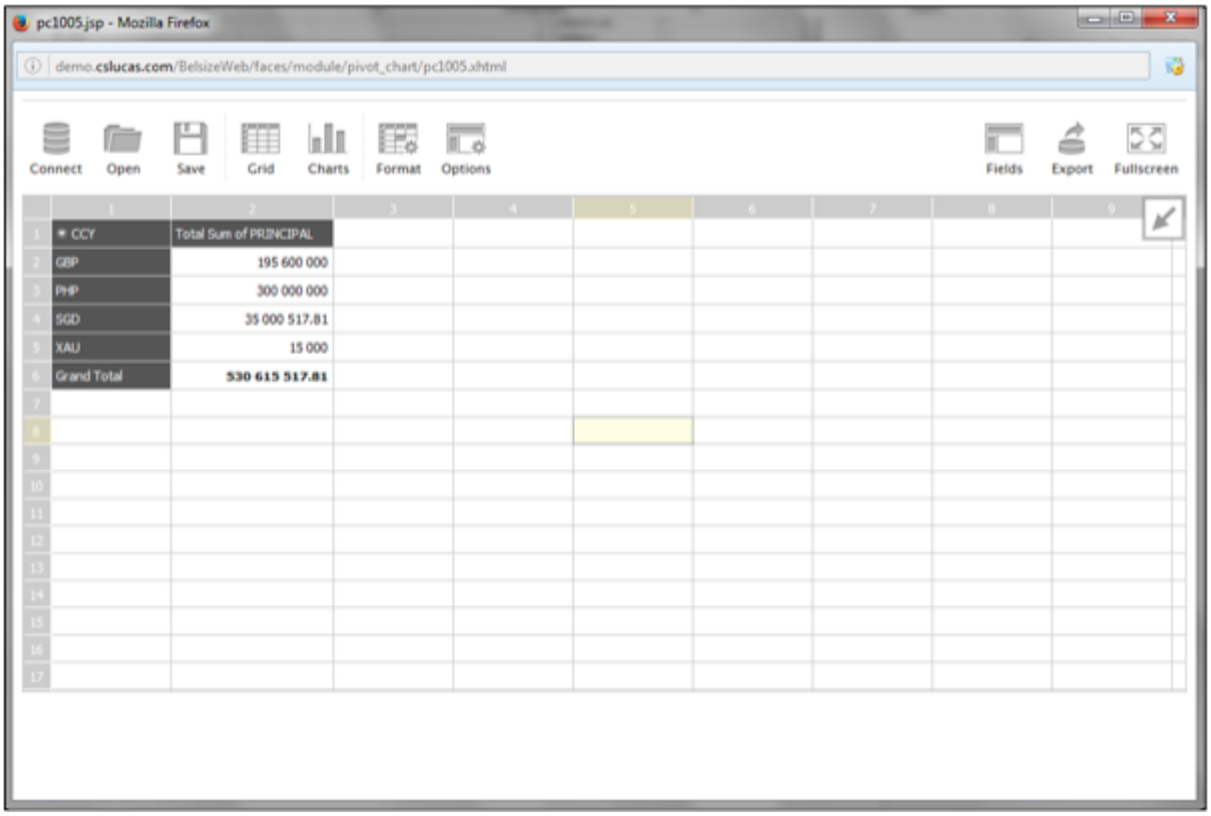


7. From this window, drag and drop the dimensions you wish to see. In this example, to see total principal by currency.

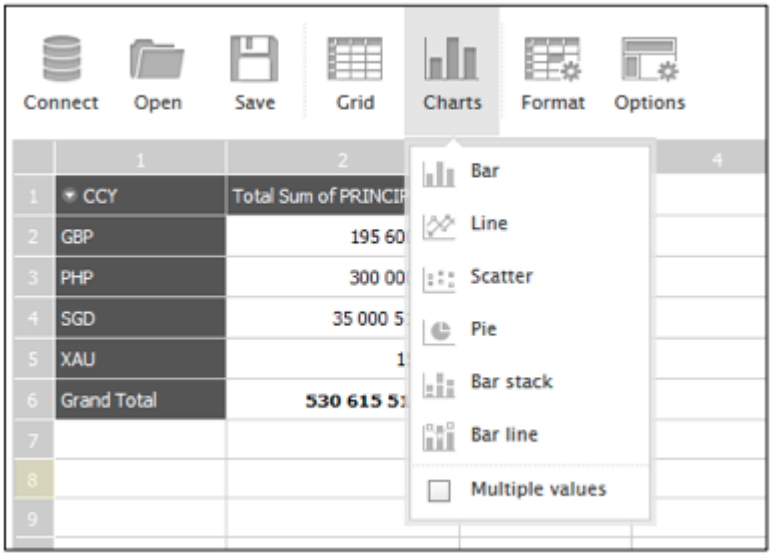


8. Click OK.

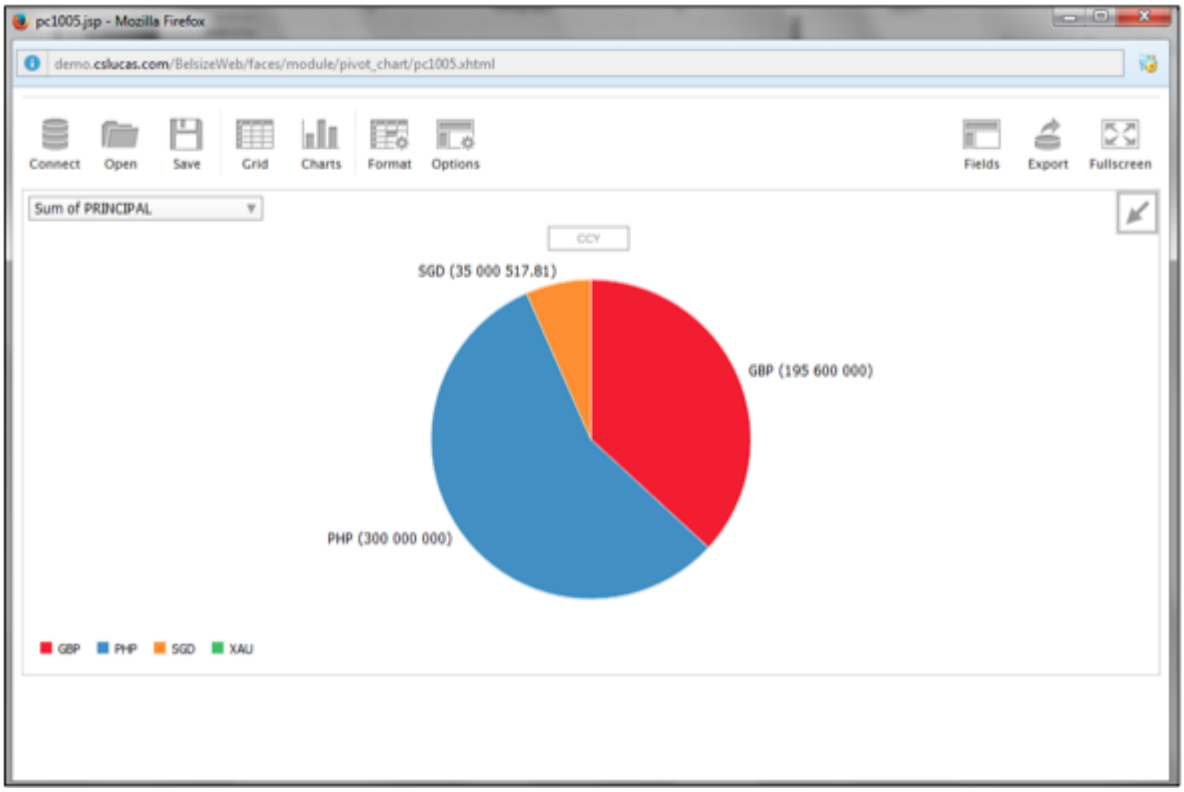
9. Pivot table based on the dimensions selected will be displayed.



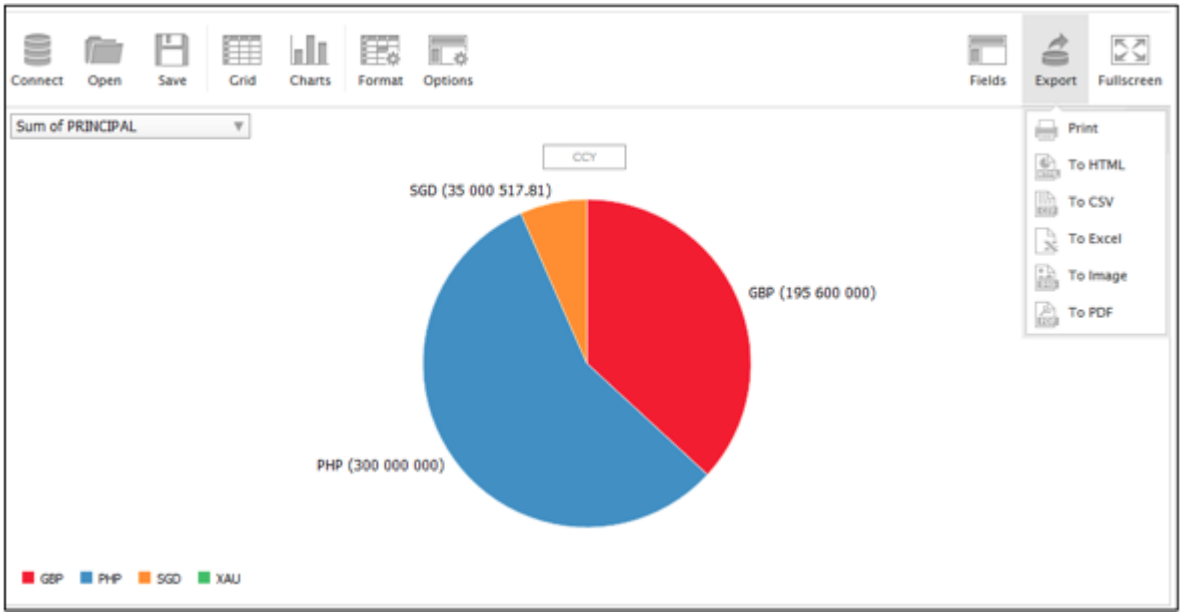
10. To create charts for the pivot, click on the Charts icon on the top menu. Choose the desired chart type.



11. The chart will be displayed.



12. There are several formats that you can export the chart. Click Export from the menu and choose the format to export.



13. See user guides for more details on pivoting/ charting from Flexmonster, click here.

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

CHANGE HISTORY

Date	By	Changes
22-Sep-2017	Clarissa	Created.