

Pivot/Chart

PURPOSE

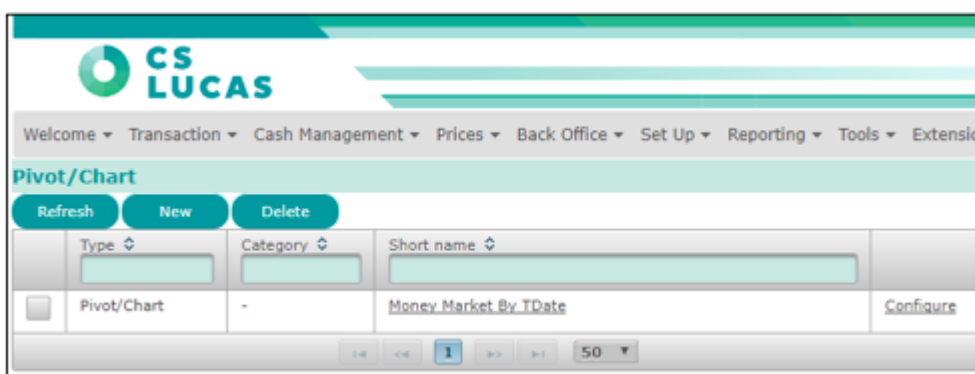
This document shows the procedures on how to access and create pivot/ chart in CS Lucas system

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.

Money Market By TDate




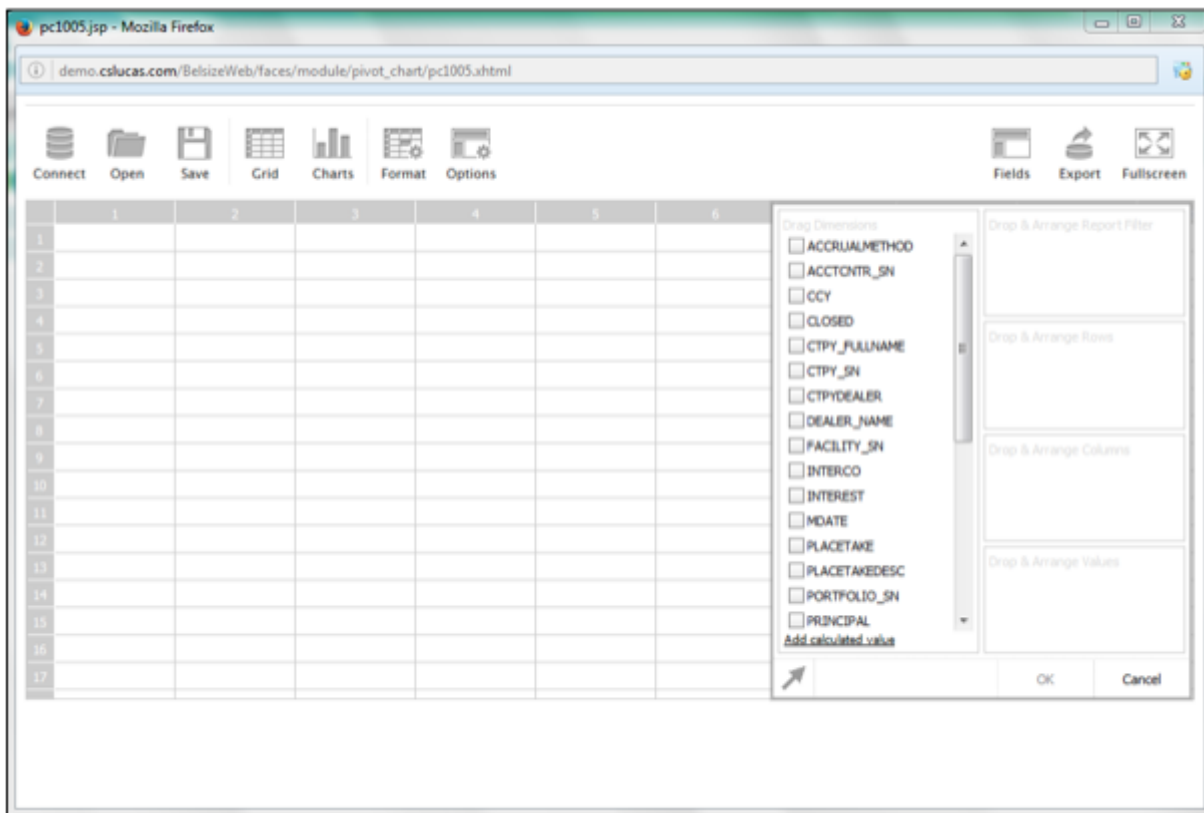
From Date*

01/01/2015

To Date*

31/12/2015

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.

Drag Dimensions

☐ ACCRUALMETHOD
☐ ACCTCNTR_SN
☒ CCY
☐ CLOSED
☐ CTPY_FULLNAME
☐ CTPY_SN
☐ CTPYDEALER
☐ DEALER_NAME
☐ FACILITY_SN
☐ INTERCO
☐ INTEREST
☐ MDATE
☐ PLACETAKE
☐ PLACETAKEDESC
☐ PORTFOLIO_SN
☒ PRINCIPAL
Add calculated value

Drop & Arrange Report Filter

Drop & Arrange Rows
CCY

Drop & Arrange Columns

Drop & Arrange Values
Sum of PRINCIPAL Σ +

OK

Cancel

8. Click OK.

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

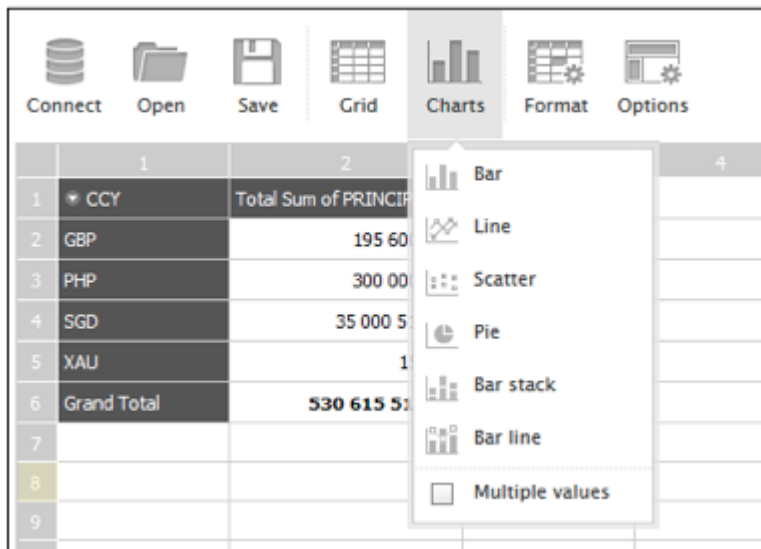
pc1005.jsp - Mozilla Firefox

demo.cslucas.com/BelizeWeb/faces/module/pivot_chart/pc1005.xhtml

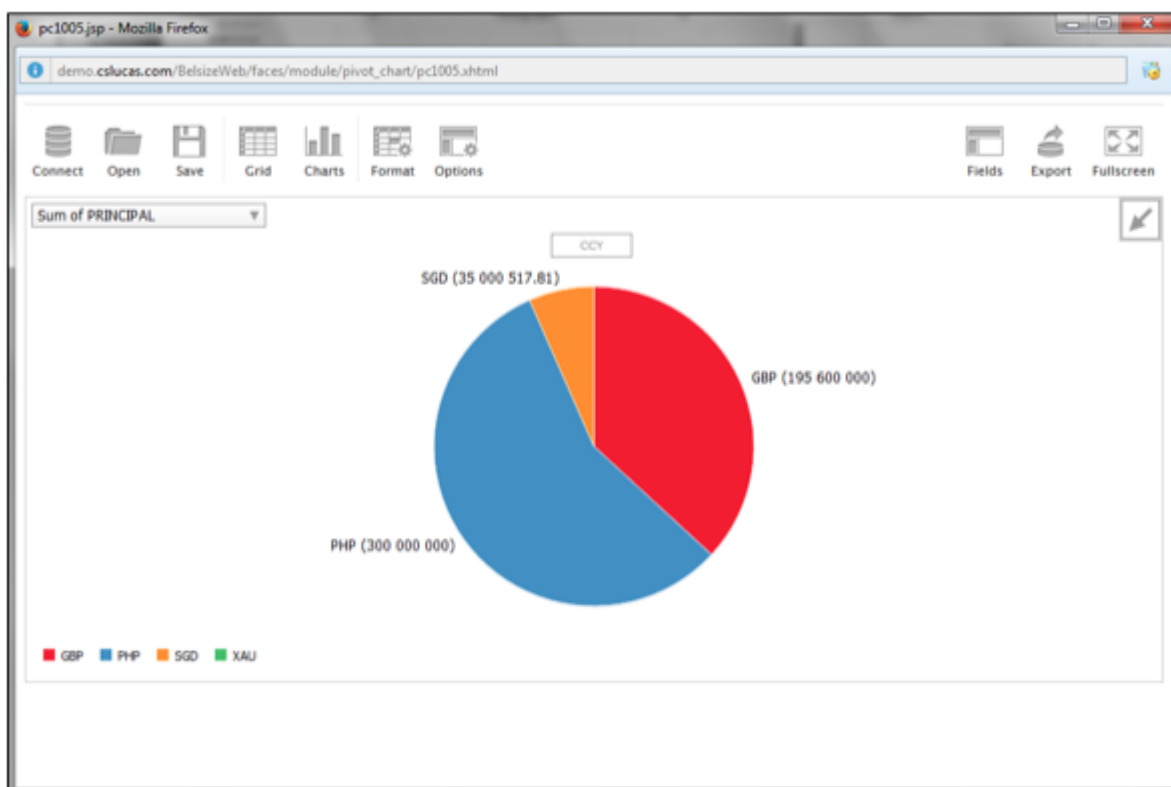
Connect Open Save Grid Charts Format Options Fields Export Fullscreen

	1	2	3	4	5	6	7	8	9
1	* CCY	Total Sum of PRINCIPAL							
2	GBP	195 600 000							
3	PHP	300 000 000							
4	SGD	35 000 517.81							
5	XAU	15 000							
6	Grand Total	530 615 517.81							
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									

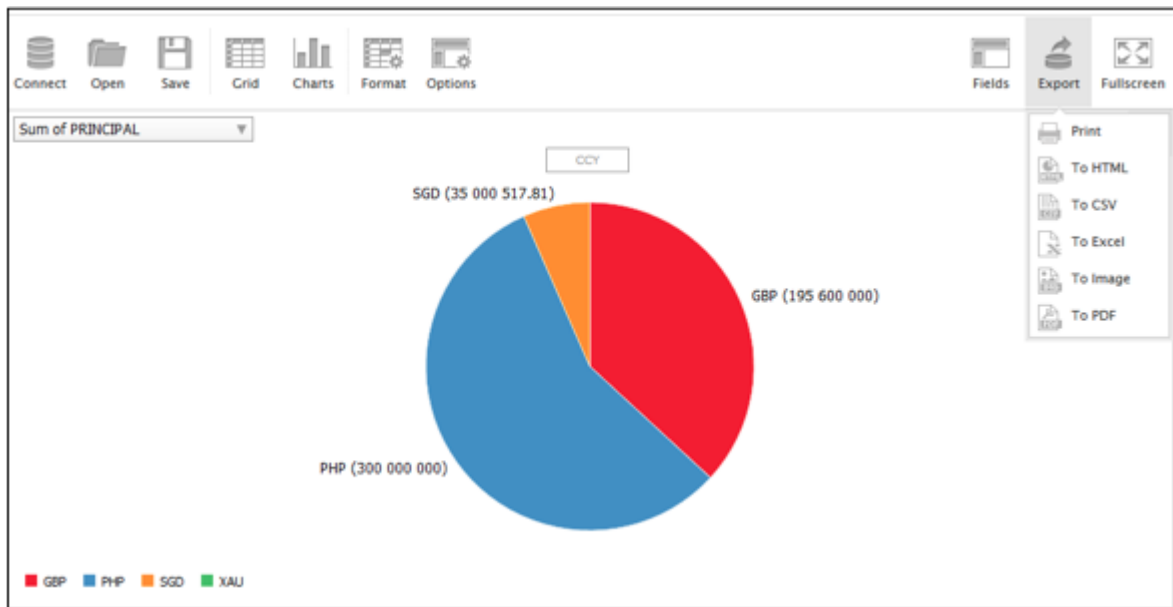
10. To create charts for the pivot, click on the Charts icon on the top menu. Choose the desired chart type.



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.