01/04/2011

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Assumes you are using previously provided instructions to run a report from the additional reports menu and we are using the Diversity Appeal Labels as an example process. All labels and read around lists should follow the same steps listed below. Access and save a sample report from Jenzabar to Excel

- **1.** Double click on the diversity\_appeal\_nov2010 which can be found in the special\_appeals.pbl.
- 2. Build an Excel file to pass around.
- From the tool bar menu choose File ... Save Rows As...
- Navigate the Save In Window to choose a location for your file. Fill in the File name and choose EXCEL8 (97/ 2000/ XP /2000) with headers. VERY IMPORTANT!

Save As		<b>D</b> • • •		? 🗙
Save in: 🞯	Desktop	•	•	r 📰 📩
My Docume My Comput My Networ XP Academ eoy.xls giftsbydon	ents :er k Places ic Applications or.xls	Igiftsbyfund.xls Igiftsbyfund.xls IgimaIn DIRECTORY.x My Recent Documer FigiOld c drive	ls Its	
File name:	Diversity2010	_PassAround		Save
Save as type:	Excel8 (97 / 2	2000 / XP / 2003) with he	ader: 💌	Cancel
Encoding:			~	

- Click the SAVE button.
- Navigate through explorer and open the Excel File you just created.
- Click to expand all columns
- Change column titles as desired

### Double click between columns to expand all columns

0		- (2	+) <del>-</del>				de	veloome	nt_alun	nni [Co	mpatibilit	ty Mod	e] - Micro	soft E	cel				
000	Hom	e Ir	nsert	Page Lay	out	Formula	s D	ata F	Review	View	/ Dev	eloper	Add-In	s A	crobat				
The	mes Co mes Co Eff Themes	lors + nts + ects +	Margin	s Orienta	) [. tion S	ize Prir • Area	nt Brea	ks Backg	round	Print Titles	Widt	th: Aut ht: Aut e: 1 ale to Fit	omatic  omatic	Gridlin Vi Pr Shee	ew int E	eadings View Print	CL B CL S CL S	ring to Fron end to Back election Pan Arra	e
	A1		- (	1	f <sub>x</sub> f	amily_id			Ļ										
-	A	B	1	С	D		E	F	(	G	Н	1		J	K		L	M	
1	family_id	last_f	irst_r de	ceased	salut_l	ine_salu	t_line_a	ddr_line	addr	line_:c	ity	state	zip	1	marital	_sts spou	ise_id	deceased	firs
2	85001549	Abund	dis, CN		Mr. Ca	rlos Carl	os 1	060 Bec	ford Ro	bad G	Grosse Po	MI	4823	0-140 \$	S				
3	96842406	Aceve	edo, LN		Mr. Ju	stin Just	in 2	208 Villa	age Dri	ve N	lission	TX	7857	2-328	S				
4	94626680	Adair	Alm N		Mr an	d Mi Alm	a 2	34 Guilf	ord Fra	1	Iniversal (	TX	7814	8-361	M				

### • Change Gift Date column format:

a. Shift + End +Down Arrow [Keys] ...to select data in column 'C'

# (Don't select the header...titled *Gift\_Date*)

_	C2	$\bullet$ $f_x$	12/9/20	04 12:00:00 AM
	A	В		С
	Donor_ID	Name		Gift_Date
	85008200	Albrecht, Leslie A.		12/9/2004 0:00
	85008200	Albrecht, Leslie A.		11/22/2005 0:00
	85008200	Albrecht, Leslie A.		10/21/2003 0:00
	85022200	Arbuckle, James Ronny	/	12/18/2003 0:00
	85022200	Arbuckle, James Ronny	/	4/6/2006 0:00
	85022200	Arbuckle, James Ronny	/	4/5/2005 0:00
	85083950	Borgstedte, Donald		5/19/2006 0:00
	85083950	Borgstedte, Donald		1/27/2004 0:00

**b.** Right click selected date column > *Format Cells* 



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• Select *Date* category and *Type* of your choice

Format Cells	? 🛽
Number Alignment	Font Border Fill Protection
Category: General Number Currency Accounting Date Time Percentage Fraction Scientific Text Special Custom	Sample 12/09/04 Iype: *3/14/2001 *Wednesday, March 14, 2001 3/14 3/14/01 03/14/01 14-Mar 14-M
Date formats display o begin with an asterisk specified for the oper operating system sett	date and time serial numbers as date values. Date formats that (*) respond to changes in regional date and time settings that are ating system. Formats without an asterisk are not affected by ings.
	OK Cancel

• Hide columns: You may want to *Hide* columns as needed. E.g. if you need to hide columns E, F, & G:

	F G
sub 🐰	Cu <u>t</u>
Ea	<u>С</u> ору
1	Paste
	Paste <u>Special</u>
	Insert
	Dalata
	Delete
	Clear Co <u>n</u> tents
	Format Cells
	Column Mörlik
	<u>C</u> olumn width
	Hide
	<u>U</u> nhide
	sub.

Select all three columns > *right click* > *Hide* 

• Insert a Column: Right click a desired column location...e.g. in column D > Insert

С		D H
Gift_Date	Α 🕺	Cu <u>t</u>
12/09/04		<u>С</u> ору
11/22/05	(PA)	Paste
10/21/03		
12/18/03		Paste Special
04/06/06		Insert
04/05/05		Delete
05/19/06		<u>b</u> enere
01/27/04		Clear Co <u>n</u> tents
06/16/05		<u>F</u> ormat Cells
12/31/05		Column Width
07/23/08		
01/11/06		Hide
07/25/08		<u>U</u> nhide

• A new column appears as seen below. You may name the column as needed. In this sample a new column (Month) will display / return month result from column **'C'** 

С	D
Date	Month
12/09/04	
11/22/05	
10/21/03	
12/18/03	
04/06/06	
04/05/05	
05/19/06	
01/27/04	
06/16/05	
12/31/05	

# How to return a month

a. Change column D format to *Number* category *No* decimals...Ok

Number	Alignment	Font	Border	Fill	Protection	
Category	:		9X			
General Number		Samp	ble			
Currency Accountine Date Time Percenta Fraction	, ng ige	Decima Decima Negati	al places: 0 e 1000 Sepa ive numbers:	rator (,)		
Scientific Text Special Custom		-1234 1234 (1234 (1234	4) 4) 4)			
						8

**b.** To return Month only type the formula shown below

~	∫ <i>f</i> ∞ =month(C2	2)
	С	D
	Gift_Date	Month
	12/09/04	=month(C2)
	11/22/05	
	10/21/03	

• See month results in column **'D'** 

C	D
0	U
Gift_Date	Month
12/09/04	12
11/22/05	11
10/21/03	10
12/18/03	12
04/06/06	4
04/05/05	4

• **Delete a column** e.g. Delete column 'N' *Right click* a column and select *Delete* 

	N	0	
¥	Cu <u>t</u>		
	<u>С</u> ору		
8	<u>P</u> aste		
	Paste <u>S</u> pec	ial	
	Insert		
	<u>D</u> elete		
	Clear Co <u>n</u> t	ents	
<u></u>	<u>F</u> ormat Cel	lls	
	<u>C</u> olumn W	idth	
	<u>H</u> ide		
	<u>U</u> nhide		

• Combine data from more than one column to appear within a single column e.g.(Last\_name, first\_name, middle Name)...

P	Q	R
last_name	first_name	middle_name
Adams	Donald	G.
Adams	Glen	
Adix	Fred	
Alexander	Stacey	Α.
Anderson	Jeanne	Α.
Appling	J.	Michael
Arnold	Frank	Α.
Avalos	Maria	Dolores
Ayers	William	M.
Ayres	Thomas	E.
Ayres	Thomas	E.
Babcock	Jeffery	Α.
Barry	Mary	Elizabeth
Baumbach	Β.	C.

Note: text need to be within double quotations e.g. "Appling"

Cell references and numbers do not need double quotations. See the formula... and result in cell **'P7'** 

	P7	$\bullet$ (• $f_x$	=CONC	ATENATE("Applin	g"," ",Q7," ",R7)	
	0	Р		Q	R	
1	phone	last_name		first_name	middle_name	2
2	9097946567	Adams		Donald	G.	
3	2818939097	Adams		Glen		
4	3615782000	Adix		Fred		
5	8305601975	Alexander		Stacey	Α.	
6	5617320981	Anderson		Jeanne	Α.	
7	9795435709	Appling J. Michael		J.	Michael	
8	8305373464	Arnold		Frank	Α.	

- How to separate data? Here is an example:
  - a. Insert 4 empty columns after column 'X'



**b.** Select data in column 'X' [*Shift* +*End*+*Down Arrow*] except for the header.

Х
salut_line_1
Mr. Donald G. Adams
Mr. and Mrs. Glen Adams
Mr. Fred Adix, Jr.
Mrs. Stacey A. Alexander
Mrs. Jeanne A. Anderson
Mr. J. M. Appling, Sr.
Mr. Frank A. Arnold, Jr.
Dr. Maria Avalos
Captain William M. Ayers
Mr. Thomas E. Ayres

c. In Data (Tab) click on Text to Columns



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# **d.** Select *Delimited* option > Next

Convert Text to Columns Wizard - Step 1 of 3	? 🗙
The Text Wizard has determined that your data is Delimited.	
If this is correct, choose Next, or choose the data type that best describes your data.	
Original data type	
Choose the file type that best describes your data:	
Delimited     - Characters such as commas or tabs separate each field.	
O Fixed width - Fields are aligned in columns with spaces between each field.	
Preview of selected data:	
2 Mr. Donald G. Adams	^
3 Mr. and Mrs. Glen Adams 4 Mr. Fred Adiv. Jr.	
5 Mrs. Stacey A. Alexander	
6 Mrs. Jeanne A. Anderson	~
Cancel < Back <u>N</u> ext > <u>F</u> i	nish

e. Select *Comma* and *Space* as **Delimiters** > Next

Convert Text to Columns Wizard - Step 2 of 3	? 🗙
This screen lets you set the delimiters your data contains. You can see how your text is affected the preview below.	:d in
Delimiters	
Semicolon VI Treat consecutive delimiters as one	
✓ Comma     Text gualifier:       ✓ Space	
Other:	
Data preview	
Mr Donald G Adams	
Mr. and Mrs. Glen Adams Mr. Fred Adix Jr.	
Mrs. Stacey A. Alexander Mrs. Jeanne A. Anderson	~
Cancel < <u>B</u> ack <u>N</u> ext > <u>F</u> ini:	sh

f. If necessary...select salutation column if you don't plan to include in the final results. Select *Do not import column (skip) > Finish* (Tab)

Convert Text to Columns Wi	izard - Step 3 of 3 🛛 🔹 💽 🔀
This screen lets you select each col Column data format General <u>T</u> ext <u>D</u> ate: MDY	lumn and set the Data Format. 'General' converts numeric values to numbers, date values to dates, and all remaining values to text. <u>A</u> dvanced
Denot import column (skip): Destination: \$X\$2 Data preview	
Skip       GeneralGenerGeners         Wr.       Donald G.       Adams         Wr.       and       Mrs.       Glen         Wr.       Fred       Adix Jr.         Wrs.       Stacey A.       Alexar         Wrs.       Jeanne A.       Anders	Al General Adams Adams
	Cancel < <u>B</u> ack Next > <u>Finish</u>

• How to Run a Subtotal Function:

For example; you want to summarize the \$ amount received/promised by solicitors....

a. Sort the 'Solicitors' column: *Home* (Tab) > *Sort&Filter* > *Custom* 



*b.* Select *Sort by Solicitors* and put a **check mark** at *My data has headers* 

Sort					? 🛛
₽ <sub>A</sub> j <u>A</u> dd	Level X Delete Level	Copy Level	1 Joptions.		My data has <u>h</u> eaders
Column		Sort On		Order	
Sort by	Solicitors 🗸 🗸	Values	~	A to Z	*
					OK Cancel

c. See Solicitor column sorted from A to Z

Brian K. Danforth Brian K. Danforth Brian K. Danforth Charles Merrill Vestal James Chris Bischoff James Chris Bischoff James Chris Bischoff

d. Find *Subtotal* command from **Data** (Tab)



e. i. Select At each change in: Solicitors

ii. Use function: Sum

iii. Add subtotal to: **Amount** (column) OK

Subtotal 🛛 🛛 🔀
<u>A</u> t each change in:
Solicitors
Use function:
Sum 💌
Add subtotal to:
gift_dte
(2) description     phone
<ul> <li>Replace current subtotals</li> <li>Page break between groups</li> <li>Summary below data</li> </ul>
Remove All OK Cancel

f. Summary is shown in outlines 1, 2, & 3. The image below shows outline 2 summary.

12	3		F	G	Н		K	L
		1	state	zip	description	Solicitors	gift_tran_amt	gift_class
Γ+	•]	99				Brian K. Danforth Total	6603.7	
+	•	114				Charles Merrill Vestal Total	4725	
+	•]	148				James Chris Bischoff Total	14942.34	
+	•	172				Nancy Hershfield Total	89862.83	
+	•]	213				Pamela Renee Rehfeld Total	91937.07	
+	·	227				Samuel Paige Ehrlich Total	6244.31	

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### Using PivotTable and PivotChart (e.g. using weekly gift report)

(A) It is important to Save the file first >Insert (Tab) > PivotTable > PivotTable



(B) The Create PivotTable Wizard Open up. Make sure the Table/Range is correct [e.g. \$A\$1:\$N\$101] for this file. Select New Worksheet option...OK

Create PivotTable	? 🗙
Choose the data that you want to analyze	
⊙ Select a table or range	
Table/Range: giftbyfundtotals!\$A\$1:\$N\$101	<b></b>
○ Use an external data source	
Choose Connection	
Connection name:	
Choose where you want the PivotTable report to be placed	
⊙ New Worksheet	
Existing Worksheet	
Location:	<b>1</b>
ОК	Cancel

#### (C) PivotTable work area

- i. Click and drag fisrt\_mi\_last field to Row Labels area
- ii. Click and drag solicitor\_cde field to Column Labels area
- iii. Click and drag gift\_tran\_amt field to Values area

A3 -	$\int_{X}$	Sum of gift_	tran_amt						*
A	В	С	D	E	F	G	Н	PivotTable Field List	▼ ×
		0	orop Page Field	s Here					
								Choose fields to add to report:	
Sum of gift tran amt	solicit_cde 💌							last first middle	~
first_mi_last	HONMM	PHONA	SCHOL	SPORT	ILORG 750	UNSOL	Grand Total		
Charles IVI. Vestal		/50			/50		1500	gift tran amt	
James C. Bischoff	100		1000	600	550		550		
Damola D. Dobfold	100		1000	600	4500	100	1500		
(blank)	100	2500	100	300	1200	100	15650	soft_credit_vp	
Grand Total	200	3250	1100	900	19850	100	25400		=
Chang Poter	200	0200	1100		10000		20100	Solicit de	
								solicitor id	
								✓ first mi_last	
								= Cat comp 1	
								solicit_cde2	
									~
								Drag fields between areas below	e -
								🛛 🍸 Report Filter 🔤 Co	olumn Labels
								solicit	_cde 🔻
								Row Labels <b>Σ</b> Va	alues
								first mi last 🔻 Sum o	foift tr 🔻
									i gitt_titti
↔ → Sheet1	tbyfundtotals	/ <b>*</b> ]						Defer Layout Update	Update
( Index ) gr									

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**d.** In order to have a graphical presentation of the above PivotTable:

i. Make sure your curse is in your PivotTable data.

#### ii. Click Options (Tab) > PivotChart (command)

0	n 🖬 🤊 -	("-) -	giftbyfundto	tals [Compatil	bility Mode] -	Microsoft Ex	PivotTable To	ols		
0	Home	Insert	Page Layout	Formulas	Data Re	view View	Options	Design		
Piv Piv	otTable Name: otTable1 Options * PivotTable	Active Field	ild:	<ul> <li>Group Select</li> <li>Ungroup</li> <li>Group Field</li> <li>Group</li> </ul>	ion $\begin{array}{c} \begin{array}{c} \begin{array}{c} \begin{array}{c} \\ \end{array} \end{array} \downarrow \\ \end{array} \begin{array}{c} \begin{array}{c} \end{array} \downarrow \\ \end{array} \begin{array}{c} \begin{array}{c} \\ \end{array} \end{array} \begin{array}{c} \begin{array}{c} \end{array} \\ \end{array} \end{array} \begin{array}{c} \end{array} \end{array} \begin{array}{c} \end{array} \begin{array}{c} \end{array} \end{array} \begin{array}{c} \end{array} \end{array} \begin{array}{c} \end{array} \begin{array}{c} \end{array} \end{array} \end{array} \begin{array}{c} \end{array} \end{array} \end{array} \end{array} \begin{array}{c} \end{array} \end{array} \end{array} \end{array} \begin{array}{c} \end{array} \end{array}$	Refresh Cha	ange Data cource +	ear Select N Actions	Nove otTable	Fo
	D6	Ŧ	( fx							
4	A		В	С	D	E	F	G	H	1
1	•									
2	0 1 10 1				i i					
3	Sum of gin_t	ran_amt	solicit_cde	DUONA	001101	ODODT	TIODO	LINGOL	0.17.1	
4	first_mi_last		HONIMIM	PHUNA	SCHOL	SPORT	TLURG	UNSOL	Grand Total	
5	Charles M. V	estal		750			/50		1500	
6	James C. Bis	schoff					550		550	
7	Nancy Hersh	field	100		1000	600	4500		6200	
8	Pamela R. R	ehfeld	100		100		1200	100	1500	
9	(blank)			2500	0	300	12850		15650	
10	Grand Total		200	3250	1100	900	19850	100	25400	

#### e. Select chart type ...e.g. Clustered Column > OK



#### f. A chart and a PivotChart Filter Pane appears as seen below:

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#### g. Click on Move Chart command to move chart to a new page



h. Select New sheet and type in the new page name. This example is titled Amount by solicitor
 > OK

Move Chart 🤶 🏹						
Choose where you want the chart to be placed:						
	⊙ New <u>s</u> heet:	Amount by solicitor				
	O Object in:	Sheet1		*		
			ок	Cancel		

i. View chart result in a new page



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j. You may wish to adjust the 'Y' axis scale by selecting within 'Y' Axis.



k. Right click on it and select Format Axis



L. Change the Major unit option to Fixed and type in a desired scale. This example was changed from 2000.0 to 500.0 > Close



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#### **m.** Final results shown below



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Set Print Area:



Go to page **Layout** > click on **Print Titles** (command)



Brian K. Danfort

# Set page orientation, Fit to scale, Paper size

Page (Tab	) > Landsca	<b>pe</b> > Paper	size <i>Lega</i>	ОК
-----------	-------------	-------------------	------------------	----

Page Setup
Page Margins Header/Footer Sheet
Orientation
A Portrait A O Landscape
Scaling
O Adjust to: 92
Paper size: Legal
Print guality: 600 dpi
Fi <u>r</u> st page number: Auto
Print Print Preview Options
OK Cancel

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•	Insert	Header	/Footer	(Tab)	)
---	--------	--------	---------	-------	---

age Set					?
Page	Margins	Header/Footer	Sheet		
He <u>a</u> der:					
(none)					*
		Custor	n Header	Custom Footer	
Eooter:					
(none)					*
Differ	rent odd an	d even pages			
Differ	rent first pa	ge			
🗹 Scaļe	with docum	ient			
🕑 Align	with page <u>n</u>	nargins		Print Print Preview Opti	ons
				OK	Cancel

## • Enter Custom Header > OK



### Enter Custom Footer > Ok

Footer			? 🛛		
Footer					
To format text: select the text, then choose the Format Text button. To insert a page number, date, time, file path, filename, or tab name: position the insertion point in the edit box, then choose the appropriate button. To insert picture: press the Insert Picture button. To format your picture, place the cursor in the edit box and press the Format Picture button.					
		📄 🗐 💷 📓 🦫			
Left section:	Center section:	Right section:			
Appeal Name Here					
		0	Cancel		

## Insert Gridlines and Rows to repeat at top

• Click on Sheet (Tab): Select Gridlines and activate Rows to repeat at top

age Setup				? 🛛
Page Margins Heade	r/Footer Sheet			
Print area:				
Rows to repeat at top:	\$1:\$1			
Columns to repeat at left;				
Gridlines     Black and white     Draft guality     Row and column headin	gs	Co <u>m</u> ments: Cell <u>e</u> rrors as:	(None) displayed	~
Page order ● <u>D</u> own, then over ○ O <u>v</u> er, then down		Print	Print Previe <u>w</u>	ptions
			ок Г	Cancel

### **Print to PDF Creator**

Print to PDF Creator: Note: need to have DPF creator installed on you computer > OK > select where to save the report > Save

Print ?X	Printing <b>?</b> ×
Printer Name: Adobe PDF Properties Status: Idle Tupe: Adobe PDE Converter Find Printer	Save PDF File As       Save in:     Development Training       Save in:     Development Training       Tweekdygiftsreport
Where:     My Documents       Comment:     □ Print to file       Print range     ○ All	My Recents Documents Desktop
Page(s) Erom:     Io:     Print what     Selection     C Entire workbook     Active sheet(s)     Table     Ignore grint areas	My Documents My Computer
	My Network File name: weeklygits%20report[] Save Places Save as type: PDF files (".PDF) Cancel

• Email the PDF to those in your distribution list.