

Editing and Printing Pivot Tables in GFS Reports

Most of the published GFS reports in ReportMart include one or more pivot tables, which summarize transaction data in a variety of ways. As useful as they are, the pivots can be manipulated to provide more or less information for your particular needs.

Add Data to a Pivot Table

There may be times when you want to add more detailed information to your pivot; e.g., you might want to see students' citizenship status in the GFS Aid Summary by Student pivot. The instructions below use this particular example, but you can apply the technique to any pivot table in any report that makes sense to you.

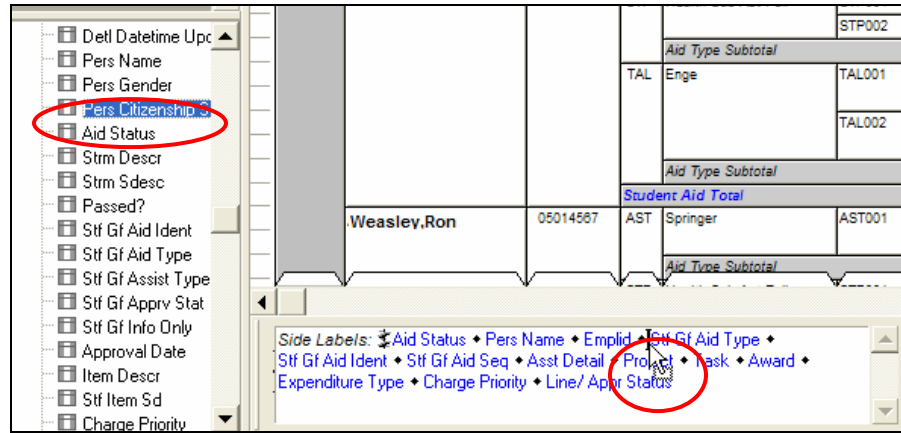


To Add a Column to a Pivot Table

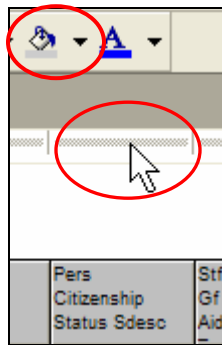
1. Start at the pivot table of your choice. To set the following options, click the menus and/or buttons, as indicated:
 - **Print Preview** *off* (you should not see report headings and margins):
File > Print Preview
 - **Outliner** *on*: located in the Section Title bar
 - **Catalog** *on*: View > Section/Catalog
 - **Formatting tool bar** *on*: View > Toolbars > Formatting

The report window should look about like this:

Aid Status	Pers Name	Emplid	Srf Gr Aid	Srf Of Aid Ident	Srf Of Aid Seq	Asst Detail	Project	Task	Award	Expenditure Type	Charge Priority	Line/App Status	Term
Active Aid Items	Diggery, Cedric	05019875	AST	Springer	AST001	RA (20hrs)	1009135	f	EAGCS	51450	RA_SAL	C/A	
Aid Type Subtotal													
STP	Health Sub Aid Full		STP001				1089538	10	AAPAA	57930	HLTH_SUB	C/A	
	Health Sub-Stp Full		STP004				1055848	f	DADIZ	57930	HLTH_SUB	C/A	
	Springer		STP002				1009135	f	EAGCS	57910	STPEND	C/A	
	Van Dam		STP003				1083843	100	DHABM	57910	STPEND	C/A	
Aid Type Subtotal													
TAL	Springer		TAL001			RA (20hrs)	1009135	f	EAGCS	51975	TU_ONLY	C/A	
							1083843	100	DHABM	51975	TU_ONLY	C/A	
Aid Type Subtotal													
TUT	Springer		TUT001				1009135	f	EAGCS	57402	TU_ONLY	C/A	
	Van Dam		TUT002				1083843	100	DHABM	57402	TU_ONLY	C/A	
Aid Type Subtotal													
Student Aid Total													
STP	Health Sub-Stp Full		STP002				1055848	f	DADIZ	57930	HLTH_SUB	C/A	
			STP003				1055848	f	DADIZ	57930	HLTH_SUB	C/A	
			STP004				1055848	f	DADIZ	57930	HLTH_SUB	C/A	
	NASA		STP001				1089643	100	RAACV	57340	STD_CHRG	C/A	
Aid Type Subtotal													
TUT	NASA Training Grant		TUT001				1089643	101	RAACV	57402	TU_ONLY	C/A	
Aid Type Subtotal													
Student Aid Total													
		06332892	STP	Health Sub-Stp Full			1055848	f	DADIZ	57930	HLTH_SUB	C/A	



2. In the Catalog pane scroll to find the field you want; then click and drag it into the Side Labels outliner, as shown above. You can place the new item wherever you want; in this case, after Emplid, and before Stf Gf Aid Type.



3. To change the fill color of the new column, click the gray bar above the column heading, to highlight the column and activate the formatting tool bar. Then, click the drop down arrow next to the paint bucket icon, and select **Transparent** from the fill color palette.

Your pivot should now look approximately like this:

Aid Status	Pers Name	Emplid	Pers Citizenship Status Sdesc	Stf Gf Aid	Stf Gf Aid Ident	Stf Gf Aid Seq	Asst Detail	Project	Task	Award	Expenditure Type	Charge
								1083843	100	DHABM	51975	TU_ON
					Aid Type Subtotal							
				TUT	Springer	TUT001		1009135	f	SAGCS	57402	TU_ON
					Van Dam	TUT002		1083843	100	DHABM	57402	TU_ON
					Aid Type Subtotal							
				Student Aid Total								
	Granger,Hermione	05012345	US Citizen	STP	Health Sub Stp Full	STP002		1055948	f	DADIZ	57830	HLTH_S
				STP003		1055948	f	DADIZ	57830	HLTH_S		
				STP004		1055948	f	DADIZ	57830	HLTH_S		
				NASA	STP001		1089943	100	RAACV	57340	STD_C	
				Aid Type Subtotal								
				TUT	NASA Training Grant	TUT001		1089943	101	RAACV	57402	TU_ON
					Aid Type Subtotal							
				Student Aid Total								
	Potter,Harry	05013456	US Citizen	STP	Health Sub Stp Full	STP005		1065948	f	DADIZ	57830	HLTH_S
				STP006		1065948	f	DADIZ	57830	HLTH_S		
				STP007		1065948	f	DADIZ	57830	HLTH_S		
				SGF	STP001		1029241	f	AABEH	57510	STIPEN	
				STP002		1029241	f	AABEH	57340	STD_C		
				STP003		1029241	f	AABEH	57340	STD_C		
				STP004		1029241	f	AABEH	57340	STD_C		
				Aid Type Subtotal								
				TUT	SGF	TUT001		1029244	f	AABEH	57402	TU_ON
			TUT002		1029244	f	AABEH	57402	TU_ON			

Delete Columns

Some of the pivot tables in the GFS reports are very wide as delivered, and truncate when printed on standard-sized paper. Perhaps you are interested in printing only certain details of aid transactions, and do not want or need all the columns that are displayed. For example, the GFS Aid Summary All Students pivot tables include some personal demographic and academic data, in addition to the aid line information.

It's easy to remove unneeded columns directly from the pivot tables. The example below uses the GFS Aid Summary All Students, but the technique can be applied to any pivot table.



To Remove Columns from a Pivot Table

1. Start at the pivot table of your choice. Set the following options (see page 1 for more details, if needed)
 - **Print Preview** *off*
 - **Outliner** *on*



2. In the *Side Labels* outliner, select the data items (columns) that you don't need to print. Hold down the Control key and click on the field names to select multiple items, for example:
 - **Pers Gender**
 - **Pers Citizenship Status Sdesc**
 - **CitizCountry Sdesc Summary**
 - **Visa Permit Type Summary**
 - **Pers Primary Ethnic Group Sdesc**
 - **Primary Ethnicity Dtl Summary**
 - **Advisor Summary**
 - **STF Gf Aid Type** (Aid Type is included in the Aid Seq number)
3. Press the *Delete* key on your keyboard to remove the selected fields.

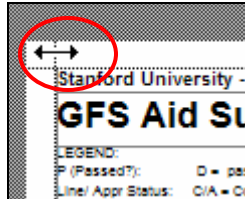
Adjusting the Margins

If the report contains the data that you need but it still does not quite fit properly on the printed page, you can adjust the margins before printing.



To Adjust Margins for Printing the Pivot Table

1. Turn **Print Preview** *on*.
2. Under the **View** menu, select **Zoom > 75%** (or smaller), so that you can see how the report looks on the page, with respect to both side margins.



3. Place your cursor over the left-hand margin (vertical dotted line), and drag it to the right, to widen the margin.
4. You can adjust the right margin in the same manner, click and drag.

If you can't adjust the report enough to print it with margins on both sides, consider deleting additional columns (as instructed in the previous procedure) until you can.