User Manual Admin

Chapter 1: About PivotXL

What is PivotXL?

PivotXL is an Excel-based unified software platform for finance, delivering a complete, fully-integrated solution dedicated to meeting business requirements that commonly require multiple, uncontrolled spreadsheets and time-consuming manual processes.

Getting Started

Browser Requirement for Web-app

PivotXL is Web-based Application so it allows the users to log in through web browsers,

- Chrome
- Firefox
- Internet Explorer 10+
- Microsoft Edge
- Safari

Logging into PivotXL Web-app

To Login into PivotXL, follow these steps

• • • VivotXL × +			
$\leftrightarrow \rightarrow C$ (a app.pivotxl.com — 1	Ð	Ê	:
PivotXL			
User-Friendly Financial Plannning Platform			
Email 2			
Password			
Log in 4			
Forgot your password?			
Signup for PivotXL Account			
PivotXL helps organizations connect Excel data from multiple users into a multi dimensional database for better financial planning and operations management.			

- 1 Navigate to your PivotXL Url (app.pivotxl.com)
- 2 Enter your username
- **3** Enter your password
- 4 Click Login

Introduction To Dashboard



1 Company Name – Name of your Company will be displayed here.

2 Tasks – You can create and assign task to other users of your company, you can also create alerts.

3 Data – You can create / edit / Update your cubes, cubes dimensions, cubes measures and templates here

4 Settings – As admin you can add/delete user and also update their information's.

5 You can access your account details and logout option here. By clicking account you can change your password

TASK

The Tasks app combines lean scheduling principles with general task management functionality to provide a lightweight work management solution for the projects in your organization. Using the Tasks app, break down project responsibilities into tasks to manage work more effectively.

Cat.	PivotXL	正			Demo Con	npany Admin 👻 D
	Demo Company	+ Add Task 🔻 Filter -			Search	Q
111	Tasks >	Tack	Due	Task Status	Action	
	Alerts	R&D Budget Requests	Due	Nat Status	3	
الہ. ح	Data y	Sample : Sample	06/29/2019	 Not started 		
*	settings /	Sample Task Sample : Sample	11/30/2019	Not Started	Ø	Ö
		Test sample task Sample Sample	01/31/2020	Completed	G	â
		© 2020 Copyright.				

1

Task Dashboard

In the Task dashboard you are having the following options,

- 1. View all the created tasks
- 2. Delete created tasks
- 3. Update create tasks
- 4. Add a new task

Edit task. And create tasks share the same view, to edit task please refer to create task.

Creating Task

Task Name			1
new nam			
Due Data 2	Task Status	3	
ene princ	- Not Started		
Instructions			
			4
No tags assigned.			5
			0
Team			0
Assigned To		Approver	• •
Select a	user in the list	• Sele	t a user in the list
Templates 🖸			
			7
No templates attached.			-
Be manual to			
pocaments			
O Upload File			8
No documents uploaded.			
Comments			
Comments			

- **1** Task Name Type you task name
- **2** Due Select task due date in the calendar
- **3** Task Status Creating the task it will be set to default option not started.
- **4** Instructions Type task related instructions here.
- 5 Tags Select tags for the task from the dialog box and click save
- Teams > Assign to You can assign the task for a user here.
 Teams > Approver You can add approver for the task here.

7 Templates – Select template for the task in pop up and click save. Templates are linked Excel files that are added in the template library. (Data -> Templates)

8 Documents – You can upload supplemental documents related to the task here.

Type your comments and click update button to save the task.

<u>A</u>lerts

Creating Alerts

This chapter describes how to create and use alerts in PivotXL webapp. It describes how to specify the events and conditions under which an alert fires, includes setting up email for alerts.

Once you click alerts in left side panel you will see the following screen.

G.	PivotXL		1							Demo Company Admin 👻 믿
	Demo Company			User	Status			Туре		
-	Tasks			Demo Company Admin	has	2	sent data to/from	Template	3 +	
	Tasks	í		Template						
	Alerts			Consolidated.xlsx	4					
al	Data	>		Checking Frequency						
۰	Settings	>		Certain day of week	5					
				Day of Week						
				÷						
				Email subject						
				Email subject						
				Email note						
									6	
						C				
				Send alert mail to						
				Demo Company Admin			7			
				Demo Company Admin2						
				John Smith						
				Jane Doe						
				Dento Oser				_		
				Save						
				Jave						

1 User – Please select the user you want to set alert trigger

2 Status - Click the drop down box to set your status. The options are,

- Has Data updated to database
- Has not Data not Updated to database.

3 Type – Selects the type of alert trigger in dropdown, The options are ,

- Cube Select cube from dropdown
- Template Select template from dropdown

Checking Frequency – Select the trigger frequency using the drop down box, The options are,

- **Daily** The trigger will be checked on daily basis.
- **Certain day of week** Select the day of week in the dropdown box.
- Nth day of the month Select the date of month in the dropdown box)
- **5** Email Subject Type alert email subject here
- 6 Email Note Type alert email body here

7 Send alert mail to – Select the user you want to send alert email. (You can select multiple user by clicking users while pressing Ctrl Button)

Once you set up all the alert event triggers, Click on **save** button to save the alert.

View / Delete Alerts

To View/Delete created alerts click on alerts in the left side panel, scroll down to the bottom you can see the all created alerts.

If you want delete alerts, click on the delete icon – alert will be deleted.

5	PivotXL		ē					Demo Company	Admin 👻				
	Demo Company		Created Alerts										
1	Tasks >		User	Status	Cube/Template	Frequency	Subject	Note	Action				
al	Data >	John Smith	has not	Workforce	Daily	John Smith has not entered workforce data	Hi - we noticed that you have not entered data. Kindly contact Anniel if you are having trouble.	â					
٥	Settings >	•	Jane Doe	has	Workforce	Daily	Jane Doe has entered workforce data	Hi - we noticed that you have entered data to Workforce Cube	â				
				John Smith	has not	Consolidated.xlsx	Daily	John Smith has not entered data to template	Hi - we noticed that you have not entered data to template. Kindly contact admin if you are having trouble.	â			
			Jane Doe	has	Consolidated.xlsx	Daily	Jane doe has entered data to template	Hi - we noticed that you have entered data to template	â				
							John Smith	has not	Workforce	Certain day of week - Monday	John Smith has not entered workforce data on Monday	Hi - we noticed that you have not entered data on Mond. Kindly contact admin if you are having trouble.	۵
						Jane Doe	has	Workforce	Certain day of week - Tuesday	Jane Doe has entered workforce data Tuesday	Hi - we noticed that you have entered data to Workforce Cube on tuesday	â	
						John Smith	has not	Workforce	Nth Day of month - 21	John Smith has not entered workforce data on 21st	Hi - we noticed that you have not entered data on 21st of this mpnth. Kindly contact admin if you are having trouble	â	
			Jane Doe	has	Workforce	Nth Day of month - 21	Jane doe has entered workforce data on 21st	Hi - we noticed that you have entered data to Workforce Cube on 21st of this Month	â				
		C	2020 Copyright.										

<u>Users</u>

As PivotXL admin you can add / delete - user / admin.

Creating Users

Sp PivotXL			ē			Demo Company Admin 🗸 📭
•••••••••••••••••••••••••••••••••••••••	Demo Company Tasks	>	Admin			4 Add User
al	Data	>	Name	Title	Email	Action
۰	Settings 1	~	Demo Company Admin	Mr	demopivotxladmin@yopmail.com	©.
	User 2		Demo Company Admin2	Mr	demopivotxladmin2@yopmail.com	©.
	Notification		Ragul	Mr	ragul@live.com	G
	Tags				2	
			User			
			Name	Title	Email	Action
			John Smith		demopivotxluser1@yopmail.com	ଓ 💼
			Jane Doe		demopivotxluser2@yopmail.com	© 💼
			Mary K		demopivotxluser3@yopmail.c om	© 💼
			© 2019 Copyright.			

- 1 Click settings on the left side menu
- 2 Click user under settings menu

3 You can see the list of users/ admin created for your company. You can also edit / delete users here.

4 Click add user button to add new user / admin

💬 PivotXL	⊒					nin - 💽
🗒 Demo Company		Create User				
Tasks >	Admin	Name*	Name 1	<u>ا</u>		
ul Data >	Name					
🌣 Settings 🗸		Title	Title 2			
- User		Email*	Email 2			
		Eman				
Tags		Is Admin?	4			
	User		Cancel Add User -5			
	Name				Act	
		-		demopivotxluser1		

- **1** Name Type the user name
- 2 Title Title of the user (Mr / Ms / Dr)
- **3** Email Type email of the user
- 4 Is admin Check the box to set this user as admin
- 5 Click the add user button to add the user.

Note:

The User will receive an Email to their registered Email – ID. By clicking the confirm button they can able to create their password using that they can login with PivotXL Web-app.

<u>Cubes</u>

Follow the below steps to create Cube, Dimensions and Dimension Members.

Creating Cube

G₽ PivotXL	Ξ.	Demo Company Admin 🗸 D
 Demo Company Tasks > 	СИВЕ 4-	÷ Add Cube
.ıl Data 🚺 🗸	P&L	Ø
Cubes 2	Workforce	G
Templates	Development	G
🌣 Settings >	Support - 3	G
	SupportTeam	G
	C-Suite	G
	Implementation Team	G
	© 2019 Copyright.	

- 1 Click data on the left side menu
- 2 Click cubes under data menu
- 3 You can see the list created cubes here
- 4 Click add cube button to add a new cube.

Cip I		Ξ		Demo Company Admin 👻 D
🗒 D			Create Cube	
т 🗟			Cube Name*	
al D			Cube name	
c			Cancel Add Cube 2	
T				
¢ s				

- 1 Cube Name : Enter cube name
- 2 Add Cube: Click button to create a new cube

Creating Dimension

After creating cube , follow the steps for creating dimensions for the cube.

♀ PivotXL			Ē	Demo Company Admin 🗸 💽
	Demo Company Tasks	>	CUBE	+ Add Cube
al	Data	~	P&L1	G
	Cubes		Locations	Ğ
~	Templates		Month	©.
÷	Settings	·	Year	©.
			Scenario	G
			Measure	
	2		+ Add Dimension + Add Shared Dimension	
			Workforce	©.
			Development	©.
			Support	Ø
			SupportTeam	©.
			C-Suite	G
			Implementation Team	©.

- 1 Click on the cube you want to add dimension
- 2 Click Add Dimension to create a new dimension
- **(3)** Click Add Shared Dimension to create a new dimension form Existing cube

dimension

Add Dimension :

Cp PivotXL	ī		Demo Company Admin 🗕 💽
関 Demo Company		Create Dimension	
📰 Tasks >		Dimension Name*	
ul Data V		Dimension name	
Cubes		Cancel Add Dimension2	
Templates			
<table-cell> Settings ></table-cell>			
	+ Add Dimension		

1 Dimension Name : Enter Dimension name

2 Add Dimension : Click button to create a new dimension for cube.

Add Shared Dimension :

D PivotXL	⊡		Demo Company Admin 👻 💽
🗒 Demo Company		Create Shared Dimension	
E Tasks → ,ıl Data ✓ Cubes		Select Cube	
Templates		Year Z	
		Cancel Add Shared Dimension	
	Measure + Add Dimension		

- 1 Select cube you want to add dimension from
- 2 Select dimension you want to add
- 3 Click Add Shared Dimension to create shared dimension.

Adding Dimension members:

🗇 PivotXL	Œ	Demo Company Admin 🗸 💽
 Demo Company Tasks > 	CUBE	+ Add Cube
. .il Data ∨ Cubes Templates	P&L 1 Locations 2	ی ت
• Settings >	Boiling Springs Pelham Tags + Add Dimension Member + Add Dimension Tag	C C
	Month Year Scenario Measure	ນ ນ ນ
	+ Add Dimension + Add Shared Dimension Workforce	C C

- 1 Select cube you want to add dimension member .
- **2** Select dimension you want to add dimension member.
- **3** Click on Add Dimension Member button to create dimension member.

GD	PivotXL	•	Demo Company Admin 👻 💽
		Create Dimension Member	
88		All Dimension Name*	
al		+ Add Dimension M	
		Cancel Add Dimension Member – 2	
		Month	
•			
		Add Dimension Add Shared Dimension	
_			

- 1 Dimension Name : Enter Dimension member name
- **2** Add Dimension : Click button to create a new dimension member for cube.

Adding Measures to Cube :

€⊅ PivotXL	Ξ.	Demo Company Admin 🗸 💽
 Demo Company Tasks > 	CUBE	+ Add Cube
ul Data V	P&L1	G
Templates	Locations	Ø
🗘 Settings >	Month	Ø
	Year	Ø
	Scenario	Ø
	Measure2	
	Food Revenue	ଓ
	Beverages Revenue	Ø
	Ancillary Products Revenue	Ø
	+ Add Measure3	
	+ Add Dimension + Add Shared Dimension	
	Workforce	Ø
	Development	Ø
	Support	C

Follow the steps to add measures to the cube.

- 1 Select the cube to add measures
- 2 Click on measures under the cube
- 3 Click on Add Measure will open a pop up to create measure

Cp PivotXL	E		Demo Company Admin 👻 🗾
📕 Demo Company		Create Measure	
📰 Tasks 🔿		Measure Name*	
,d Data ∨		Measure name	
Cubes		Measure Type*	
Templates			
🕼 Settings 🤇		Cancel Add Measure	
	+ Add Measure		
	+ Add Dimension		

- **1** Measure Name : Enter Measure name
- **2** Measure Type: Select the measure type form dropdown (Text / Number)
- 3 Click on Add Measure button to create a new measure

<u>Creating Tags :</u>

Tags let you group Dimensions members together, manually. They're great for highlighting common characteristics.

🕼 PivotXL	· 正		Demo Company Admin 🚽 💽
📕 Demo Company		Create Tag	
📰 Tasks 🔿		Tag Name*	
,,∥ Data ∨		Tag name	
Cubes Templates		Cancel Add Tag	
🛱 Settings >			
	+ Add Dimension		
	+ Add Dimension		

Select the cube and dimension you want to add tag, Click on add Add Dimension Tag

Button

- **1** Tag Name : Type tag name
- **2** Add Tag : Click to add tag

Assigning Tags :

Once you added tags you have assign it to dimension members to group together for analysis.

æ		Demo Company Admin 👻 💽
	Assign Tag	
	Open	
	Cancel Assign Tag	
+ Assign Tag		

Select the cube, dimension and dimension member – Click on Assign Tag Button member in dimension member.

- **1** Select Tag: Check the tag name / names to add to dimension member
- **2** Assign Tag : Click on assign tag

Excel Add-in User Manual

Once you have created cubes and dimensions in web-app, Now it's time to jump into PivotXL – add-in.

This tutorial explains you complete functionalities of add-in and teaches you how to use add-in for financial purposes.

Installing Add-in

Open Microsoft Excel and do the following steps to install



- Click on the insert tab on Excel ribbon
- 2 Click on Get add-ins button

🗯 Excel File Edit View Insert Format	Tools Data Window	Help		🛓 🚳	* 🔅	29% 🗈	Wed 2:54	PM Q	S 🔝
●●●● ☆ ⊟ ち ♂ J =		Во	ok1						∙
Home Insert Draw Page Lavout Er		Office /	Add-ins					<u>.</u> + s	hare A
Home Insert Draw Page Layout PAGE Page Layout PAGE Page Layout PAGE PAGE PAGE PAGE PAGE PAGE PAGE PAGE	Office Add-ins MY ADD-INS ADMIN MANAC Add-ins may access personal an Pivotol Category All CRM Data Analytics Document Review Editor's Picks Education Financial Management	Bo Office / JED STORE d document information. By using an PivotXL Excel Based Cloud F May require additio	okt Add-ins n add-in, you agree to its Permis inancial Planning mal purchase	sions, License Terms and Privacy Policy. Suggested for you ~ Add	Pew mment Q	Q.	Search Shee	L+ S π Equi Ω Sym T	eventorial and the second seco
19 20 21 22 23 24 25 26 27	Maps & Feeds Productivity Project Management Sales & Marketing Training & Tutorial								
28 29 30 31 32 33 34 35 36	Utilities Visualization								
Sheet1 + Ready								+	100%

Search for PivotXL add-in store and click on the add button

Â		ن ب	J =								Book	2							Q- Sea	rch Sheet		©•
Ho	me	Insert	Draw	Page Layo	ut Formu	ulas Da	ita Revi	iew V	/iew												🛓 + Sha	are 🔨
Ê	8	6 C	alibri (Body)	• 12 •	A - A-	= =	= %	•	📑 ƏVrap Text	•	General		•	₽ •	· 📝 ·	me Inse	ort T	Σ	Q.	MSFT \$47		
Pas	te ≼	3	B I <u>∪</u>	• • •	<u>\$</u> - А -	= =		●Ξ	🐽 Merge & C	entre *	3 • %	0. *	.00 .0 Co	onditional For ormatting as 1	mat Cell Table Styles	E Forr	mat *	Sort & Filter	Find & Select	Launch	Show Taskpane	
130	;	×	$\sqrt{f_x}$																			*
		В	С	D	E	F	G	н	1	1	к	L	М	N	0	Р	Q	R	s	т	U	v
1	А																					
3	U																				•	
4																						
5																						
7																						
8																						
9																						
11																						
12																						
13																						
15																						
16																						
17																						
19																						
20																						
21																						
23																						
24																						
25																						
20																						
28																						
29																						
30																						
32																						
33																						
34																						
36																						
37																						
38																						
40																						
41																						
4	▶	Sheet1	Sheet2	Sheet	3 +																	
Re	ady														Add-ins lo	oaded succ	essfully		<u> </u>	-0	+	100%

After you installed add-in from store,

1 Click on Home tab in excel ribbon

2 In the right to corner you can see the PivotXL addin , Click on that add-in to deploy.

Logging Into Add-in :



1 Enter your Email

- 2 Enter your password
- **3** Click on login button

Add in – Dashboard:

6	ن ب	ত	-									Book	2						Q~ Sear	ch Sheet 🕘 🗸
Home	Insert	Dra	aw	Page Lay	out Fo	ormulas	Dat	a R	eview	View										🛂 + Share \land
Ē - 🤌		Calibri (Body)	* 12	• A• /	A-	= =	-	3 ⁰	📑 Ə Wrap Tex	at *	General		•	.		• Inser	t • Σ •	<u>Α</u> γ.Q.	MSFT 6.47
Paste		B I	U	•	👌 - 🔺	•	5 E	=	•=	🐽 Merge &	Centre *	3 • %	0. *	.00 C	onditional	Format Cell as Table Styles	E Forn	te v 🎍 v lat v 🥔 v	Sort & Find & Filter Select	Show Launch
Z22	×	√ f	ž.																	
A	В		С	D	E		F	G	н	1	- J	К	L	м	N	0	Р	PivotX	- Excel Based	Cloud Financial Pla 🕲
1																		~		
3																			PivotXL	*
4																		1	2	3
5																				
6																		DATA	MAP DATA	TEMPLATE
8																		_		
9																				
10																			Get Data	Send Data
11																		_	Gerbata	
12																				
14																				
15																		DA	TA VERSION	
16																		_		
18																				
19																		s	how versions	
20																				
21																		_		
22																				
24																		D	ownload Data	
25																				
26																				
28																		_		
29																				
30																				
31																				
33																				
34																				
35																				
36																				
38																				
39																				
40																				
41																		0.00/0		
< >	Sheet1	S	heet2	She	et3 +	-												© 2019 C	opyright.	
Ready																Add-in:	s loaded succe	essfully III	E	+ 100%

Add-in dashboard includes three sections,

1 Data : Once you mapped your template with cube you can send / Get data , also you can view the edited history by clicking show version and you can download the cube data by clicking download data

2 Map Data: You can map single cell, Bulk mapping, add/ delete rows and columns in mapped templates and creating filters for the templates.

3 Template: You create new template from existing template using duplicate template. (Ex: you mapped a template for January month, from that you can able create one for February without linking again.) and reporting template it allows only viewing of data.

Mapping Data

<u>Cell Mapping – One to One Mapping:</u>



- 1 Click on cell you want to map
- 2 Select map data tab as shown in picture
- 3 Click on Cell map button. It will show cell map in the bottom of plugin.

4 Select cube, dimension, dimension members and measures you want to map.

5 After selected all properties of the cube click on link data, you will see a toaster

saying link created successfully.

Cell Mapping –Bulk Mapping:

You can map range of cells using our bulk mapping feature.

^ ⊟	რ ი ი	÷								Book	2						Q+ Se	arch Sheet	©•
Home	Insert	Draw P	age Layout	t Formu	ılas Da	ita Re	view	View										≗ + s	hare 🔨
- 🐴 - 👗	Calib	ri (Body)	12 *	A• A•	= =	- *	~ -	📑 Vrap Tex	t *	General		•	↓ •	~ •	mellete v	Σ	27.Q.	MSFT \$ 47	
Paste 💞	В	I <u>U</u> ▪		• A •	= =		= •=	Merge &	Centre 🔻	3 • %)	.00 .0 C	onditional F	ormat Cell s Table Styles	Format *		Sort & Find & Filter Select	Show Launch Taskpane	
B2 🛔	$\times \checkmark$	fx																	
A A	В	С	D	E	F	G	Н	I.	· · · · J ·	к	L	М	N	0	Р	PivotXL	- Excel Base	d Cloud Financial	Pla 🕲
2 3																GD P	ivotXL		i
4 5 6 7 8																DATA	MAP DATA	TEMPLATE	2
9 10 11 12																	Cell Map	Bulk Map	
13 14 15 16																R	ows/Columns	Filters	
17 18 19											1					CEL	L MAP		
21																Sele	ct Cube		
23																Inc	ome		\$
25																Sele	ct Measure		
27																Fo	od		\$
29 30																Sele	ct Locations		
31 32																Pe	lham		\$
33 34									-	J						Sele	ct Month		
35 36																Ja	nuary		\$
37 38																Sele	ct Year		
39 40																20	19		\$
41 4 Ready	Sheet1	Sheet2	Sheet3	+										Add-ins lo	aded successf	ully 🗉	Link Data	Delete Lin	ik 100%

- 1 Select range of cells you want to map
- 2 Click on the bulk map button a pop will open

		Book2		Q~ Search Sheet 🙂
me Insert 🔴	○ ●	Office Add-ins - dev.pivotxl.cor	m	🛂 Share 🔺
e 💞 B	BULK MAP CELL			W Launch sane
\$ × ~	Select Cube			
A B	Workforce	÷ 1		d Financial Pla
	Dimension	Row	Column	0
	Departments	• 2		MPLATE
	Month		• 3	Bulk Map
	Scenario			Filters
	Team			
	Year			
	Measure			\$
	Select Departments - Top to bottom	Order of Dep	artments selected	\$
	Development Support Implementation Clinical Testing	Support Implemen Clinical C-Suite	atation 4	Delete Link
	Tags			_
Sheet1 Sh	eet2 Sheet3 +			© 2019 Copyright.

ি নে চি ত হ	Book2	Q- Search Sheet
Home Insert 👝	Office Add-ins - dev.pivotxl.com	🛂 Share 🔨
Paste S B	Select Month - Left to right Order of Month selected	WSFT \$47 Launch
B2 + X / A B 1	January February February February March April July July July July September Ctober	d Financial Pla @
10 11 12 13 14	Select Scenario Actuals	Bulk Map Filters
15 16 17 18 19	Select Team	
20 21 22	Select Year 2020 ÷	
23 24 25	Select Measure	÷
27 28 29 30 31 32 33 34 35 36 37 38 39 39 44 40 40 40 40 40 40 40 40 40 40 40 40	e 2019 Copy	Celete Link
Ready	Add-ins loaded successfully] 四

In the Popup window

- 1 Select the cube you want to map
- **2** Select the dimension for row
- **3** Select the dimension for columns

Select the order of row you want to map (Ctrl + Click will select multiple dimension,
 The order will be based on clicking wise)

5 Select the order of Column you want to map (Ctrl + Click will select multiple dimension, The order will be based on clicking wise)

- 6 Select rest of the dimension for mapping
- 7 Click on link data to create the links

Creating Filters :

6	a ∽ •	ب گ								Во	ook2								Q- Sear	ch Sheet		<u>.</u>
Home	Insert	Draw	Page La	yout F	ormulas	Data	Review	View													2+ Sha	re 🔨
- A	8 0	Calibri (Body) + 12 + A+ A+ = = =		**	📑 🥥 Wra	p Text =	General			📕 🗸 🗐 🗸 🦷 Insert 🔻				Σ.	A , ,	0.		MSFT				
Paste	<u> </u>	BIU		A			₩	🗰 Mer	ge & Centre ▼		%)	00. 0. •	Conditional	Format	Cell	E Delete	•	∠ ■ Sort &	Find &	Show	\$47 Launch	
60	♥ □ ▲ ↓												Formatting	as Table	Styles	Format *		Filter	Select	Taskpane		
4	* ^	√ Jx	D	F	F	6	н			ĸ	1	м	N	0	P	0	Divert		al Dagad	Olaud Ei	energial Di	
7																<u> </u>	PIVOLA	L - EXC	el based	Cloud Fil	nancial Pi	i 😡
8				- (Pivot	XL			\$
10															2		DATA	MA	P DATA	TEMPL	ATE	
11 12																						
13																						
15																		Cell	Мар	Bull	мар	
16																						
18																		Rows/Co	olumns	Fil	ters -	
20																				·		
21																						
23																	FI	LTERS				
24																						
26																		Existing	g Filter	New	Filter	- (
27																						
29																	Filt	er Name				
30 31																	N	lonth				
32																						
33 34																	Sel	ect Cube				
35																	P	81			A	
37																					•	
38															R		Sel	ect Filter				
40															5							
41																	M	onth			÷	
43																	C-I	+ Tile	Default			
44																	Sei	ect ritter	Default			
46																	М	arch			\$	
47																						
- • •	Sheet1	Sheet	2 She	eet3 -	F										6				Save	Filter		
Ready														A 🕼	dd-ins loa	aded successfu	illy 🔛	Ξ	<u> </u>		- + 1	00%

1 Select the cell you want to create filter

2 Click on Map Data

3 Click on Filters

4 Click on New filter

5 Enter Filter name, Select cube and dimension you want to set it as filter, finally select default value for the filter.

6 Click Save filter button , A success toaster will show up with message filter created successfully

Rows and Columns:

After you created your template and mapped your cells with cube , you might have to add /delete - row / column based on financial requirements of your company without altering the existing mappings.

ሰ 🖬 ጛ 🗸 🤻 Insert Draw Pa

 Image: Charting of the second sec 00 * ₹∎ *
 Pivot Racommended Table
 Table
 Pictures Shapes Icons
 Pictures Shapes Icons
 A τ π Equation $\frac{A}{V} \times \sqrt{f_X}$ C3 С G н J K L M N O Р PivotXL - Excel Based Cloud Financial Pla... 🕲 D F D 🕼 PivotXL ÷ 3 1 DATA MAP DATA TEMPLATE 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 Bulk Map 2 WS/COLUMNS Add Column on Left + Update Link ete Column + Update Link 4 Add Row on Top + Update Li ▲2 Sheet1 Sheet2 Sheet3 + © 2019 Copyright. 🔊 Add-ins loaded successfully 🔛 🗉 — — ____ + 100%

PivotXL provide options to Add/ Delete Rows and columns

1 Click on Map Data

2 Click on rows and columns

3 You can select entire row / column or a cell in row/ column where you want to insert a new row/column.

4 Click on the button based on your requirement.

Templates

The Templates in PivotXL have two sections,

- 1. Report Template
- 2. Duplicate Template

Report Template :

When you set a excel template as a report template, you can't edit or send data through that template, but you can view that data based on the filter selections. This one helps in prepare reporting for multiple branch / departments.

6 🖬	্ ় থ									Book	2					Q~ Search Sheet	©•
Home	Insert	Draw	Page Layout	Formul	las Dat	ta Reviev		/iew								≜+ Shar	re 🔨
n - X	Calit	ori (Body)	* 12 *	A ^ A ▼	= =	= * *		📰 Wrap Text	•	General		Y	.	-	🗸 🖶 Insert	* <u>Σ</u> * A · Q · MSFT 547	
Paste ≼	В	ΙU	• 🗐 • 👲	• A •	= =	≡ •≣	•I	🕶 Merge & C	entre *	3 • %) <u>••</u> 0	00.	Conditional Formatting	Format Ce as Table Styl	es Eormat	Sort & Find & Show Launch	
C1	$\times \checkmark$	$f_{\mathbf{x}}$ Jan	uary														Ŧ
A	В	С	D	E	F	G	н		1	к	L	M	N	0	Р	PivotXL - Excel Based Cloud Financial Pla	a 🕲
1	Month	January	⇒ ar	2019												A	
2																🗇 PivotXL	1
4																	
5																	
6																DATA MAP DATA TEMPLATE	
7																	
8															-		
9																REPORTING TEMPLATE	
11																	
12																	
13																Set as Reporting Template	
14															4		
15															-		
16																-	
18																	
19																DUPLICATE TEMPLATE	
20																	
21																Select Month	
22																	
23																February 💠	
24																	
26																Select Year	
27																2010	
28																2015	
29																	
30																Duplicate Sheet	
32																	
33																	
34																	
35																	
36																	
37																	
38																	
40																	
41																	
47																© 2019 Copyright.	
- • •	Sheet1	Sheet2	Sheet3	+												17.0	
Ready														🎝 Add-i	ns loaded success	sfully 📰 🗉 – ——— + 10	00%

1 Click on Template in top-menu

2 Click on reporting template check box to change the sheet to reporting template.

Duplicate Template :

You can create new template for a new dimension member using duplicate template functionality. For example if you mapped. A template for a year 2019 and month January and created year and month as a filter, now you can able to create a new template for February 2019 by easily selecting the filters and clicking duplicate template.



1 Click on Templates in the top menu

2 In the duplicate template section select your filter values for duplicate template

3 Click on duplicate template a new sheet will be created with filters values as sheet name.