



User Guide

Reports on Power Pivot

Version 1.0

Date: Tuesday, 17th Nov 2020



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1. Introduction

1.1. Objective

The Objective of this document is to explain and Guide the user to familiarize the usage of Power pivot using template & Extract, Creating a New MIS Reports.

1.2. Scope

To Connecting with mVBRI DB and Extract, Creating a New MIS Reports.

In addition, explains how the Excel has powered to extracts the report from external data source.

- See how use Power Pivot feature extensively for MIS from AWS server.
- Usage of Existing Template
- Advantage of Predesigned format how this is faster for Extract and Report.
- Can be used the extracted data for Custom report.
- Modifying the Existing Template & Creating a new Report.

1.3. Terminology

| Acronym | Definition |
|---------|-------------------------------|
| MIS | Management Information System |
| DAX | Data Analysis Expressions |
| Excel | Microsoft office Excel |
| AWS | Amazon Web Services |

2. Pre Requisites

2.1. Credentials for Report Server

Credential for SQL Database is very important for Accessing the DB and extracting Live data from AWS.

- This can be used for Refresh an existing Queried
- Create a New Report
- Modify an template dataset



2.2. Microsoft Office 2016 and above

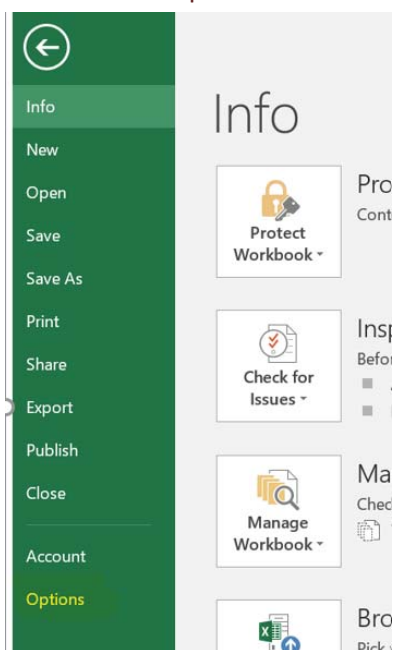
From 2016 Pro, queries with new functions for reports are enabled (DAX functions)



2.3. Enable Power Pivot in Office 2016.

Customized queries from an SQL is possible like local, AWS etc.

- Go to option



- Go to Add-ins

This option can be enabled in 2013 excel also by installing power pivot add-ins.



User Guide – Reports on Power Pivot

Excel Options

View and manage Microsoft Office Add-ins.

Add-ins

| Name | Location | Type |
|--|--|------------------|
| Active Application Add-ins | | |
| Microsoft Power Map for Excel | C:\...r Map Excel Add-in\EXCELPLUGINSHELL.DLL | COM Add-in |
| Microsoft Power Pivot for Excel | C:\...Excel Add-in\PowerPivotExcelClientAddIn.dll | COM Add-in |
| Microsoft Power View for Excel | C:\... Excel Add-in\AdHocReportingExcelClient.dll | COM Add-in |
| Inactive Application Add-ins | | |
| Analysis ToolPak | C:\...ce\Office16\Library\Analysis\ANALYS32.XLL | Excel Add-in |
| Analysis ToolPak - VBA | C:\...Office16\Library\Analysis\ATPVBAEN.XLAM | Excel Add-in |
| Date (XML) | C:\...Files\microsoft shared\Smart Tag\MOFL.DLL | Action |
| Euro Currency Tools | C:\...ft Office\Office16\Library\EUROTOOL.XLAM | Excel Add-in |
| Inquire | C:\...icrosoft Office\Office16\DCF\NativeShim.dll | COM Add-in |
| Microsoft Actions Pane 3 | | XML Expansion Pa |
| Solver Add-in | C:\...ice\Office16\Library\SOLVER\SOLVER.XLAM | Excel Add-in |
| Team Foundation Add-in | "C:\...DE\PrivateAssemblies\TFOfficeAdd-in.dll" | COM Add-in |
| Team Foundation Add-in | C:\...dation Server\14.0\64\TFOfficeAdd-in.dll | COM Add-in |
| Document Related Add-ins | | |
| Add-in: | Microsoft Power Pivot for Excel | |
| Publisher: | Microsoft Corporation | |
| Compatibility: | No compatibility information available | |
| Location: | C:\Program Files\Microsoft Office\Office16\ADDINS\PowerPivot Excel Add-in\PowerPivotExcelClientAddIn.dll | |
| Description: | Microsoft Power Pivot for Excel | |

Manage: COM Add-ins Go...

- Select Power Pivot, click on OK.

COM Add-ins

Add-ins available:

- Inquire
- Microsoft Power Map for Excel
- Microsoft Power Pivot for Excel**
- Microsoft Power View for Excel
- Team Foundation Add-in
- Team Foundation Add-in

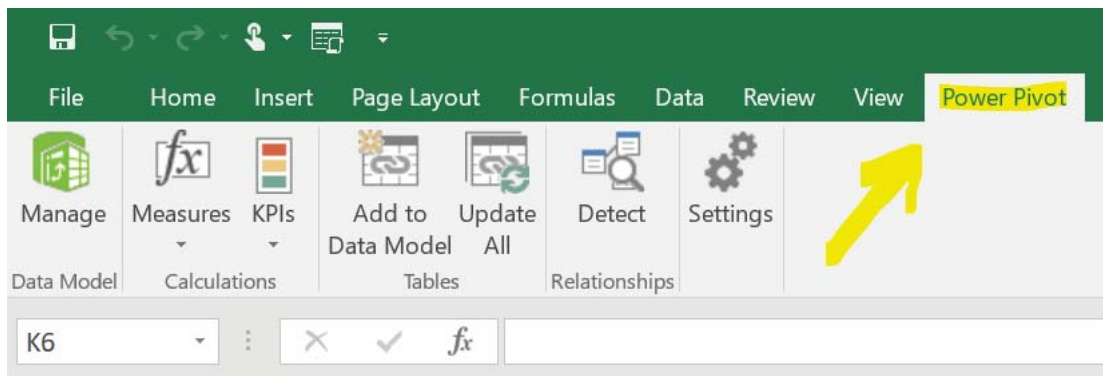
Location: C:\Program Files\Microsoft Office\Office16\ADDINS\PowerPivot Excel Add-in\PowerPivotExcelClientAddIn.dll

Load Behavior: Load at Startup

OK Cancel Add... Remove



- Go to Excel, we will be able to see Power Pivot menu now.



Now the Excel has powered to extracts the report from external data source.

3. Detailed Functionality and usage

Let us See how use Power Pivot feature in Excel extensively for MIS from AWS server.

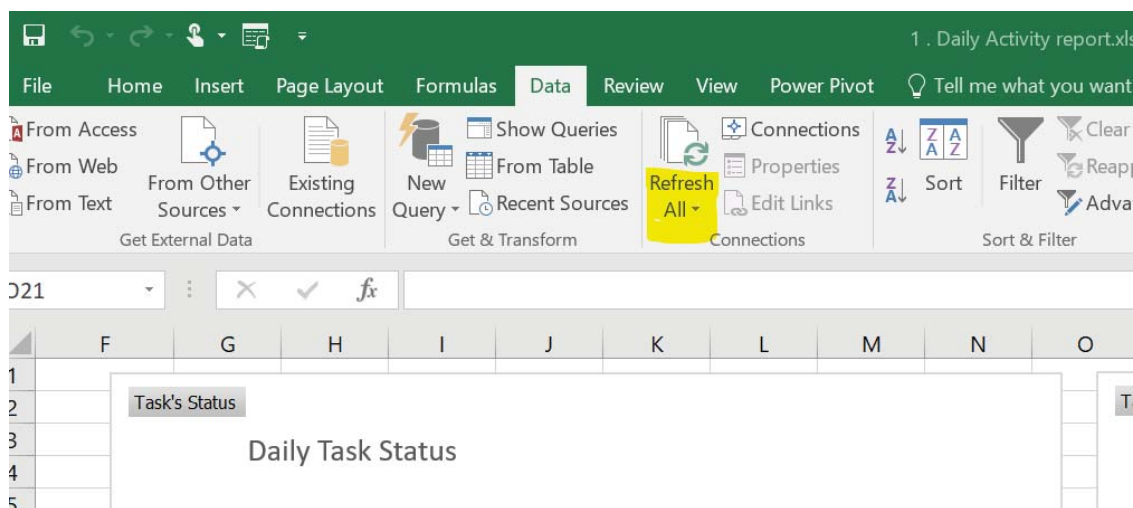
3.1. Pre-Designed Report

Power Pivot and the template-based reports has more advantages than any existing MIS system as this reduce the repetitive work in creating same report due to data extraction from source, let us list down the Advantages of template based report usage,

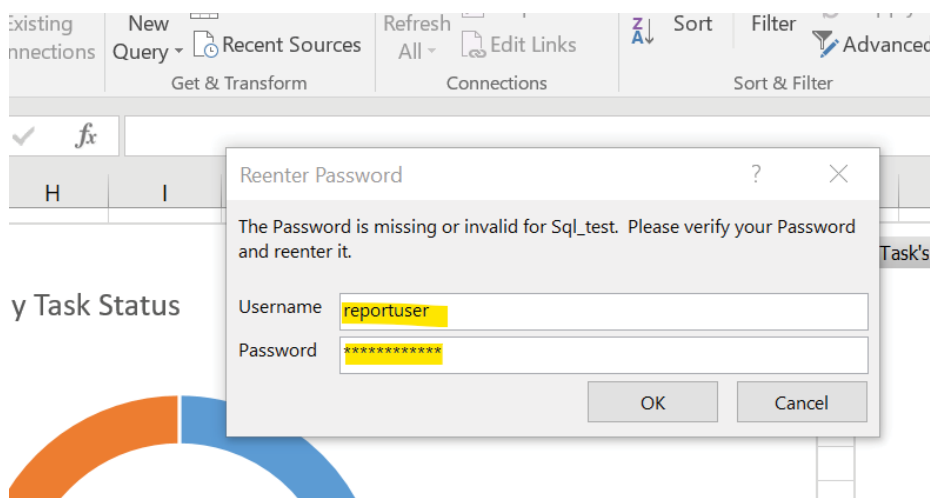
- Are easy to use as it's require only to refresh to see the report
- No person dependability to create & design a MIS, as it has the advantage of design has built once the template ready as when the refresh happen the report and graphical presentation is ready.
- More accurate as the data format and method of extraction of data format is tested well as part of template creation.
- Faster for Extract and Report than existing System where extract and generate a report is web and reporting format.
- Can be used the extracted data for Custom report, No more Multiple extraction for same dataset.
- As simple as the Pivot table in excel.

Steps to Use the Template based Report:

- Open an Existing Report



- Click on Refresh all.
- Enter the Database Credentials when asked.,

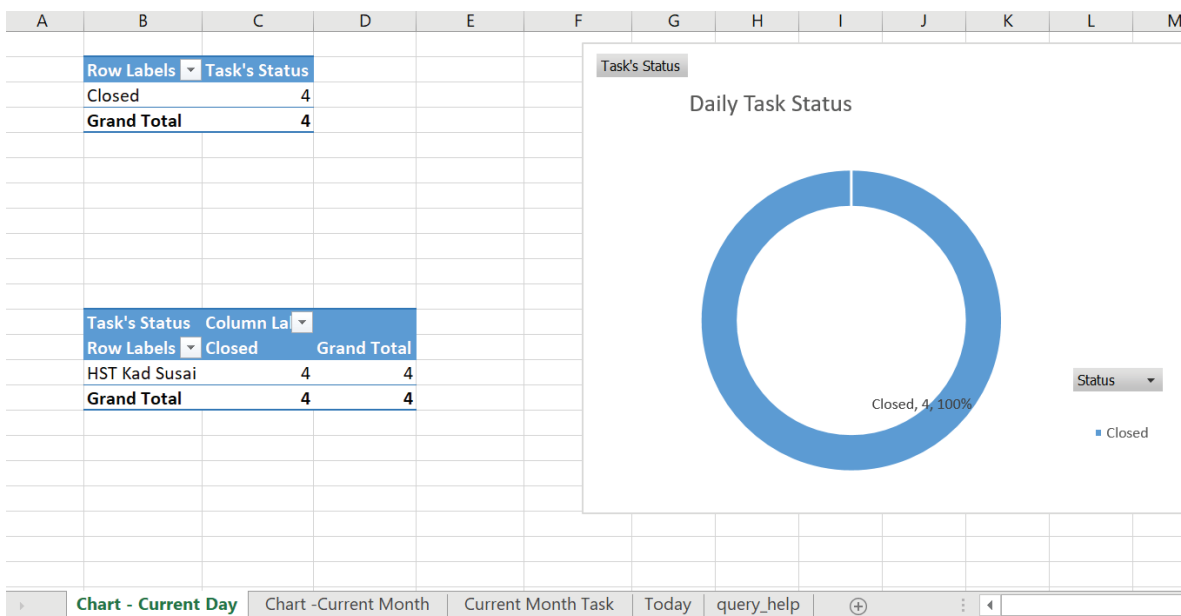




User Guide – Reports on Power Pivot

- We will be able to see the updated data all the Sheets & the Chart would refreshed automatically as per the new data.

| A | B | C | D |
|-----|-----------|---|--------------------------|
| SNo | Date | Subject | Assigned to |
| 1 | 1/27/2020 | Treatment-Cerebral Palsy with Intellectual Disability-kavi | HST Kad Susai Mahimai Ja |
| 2 | 1/27/2020 | Treatment-Cerebral Palsy with Intellectual Disability-srija | HST Kad Susai Mahimai Ja |
| 3 | 1/27/2020 | Treatment-Cerebral Palsy with Intellectual Disability-srija | HST Kad Susai Mahimai Ja |
| 4 | 1/27/2020 | Treatment-Cerebral Palsy with Intellectual Disability-srija | HST Kad Susai Mahimai Ja |

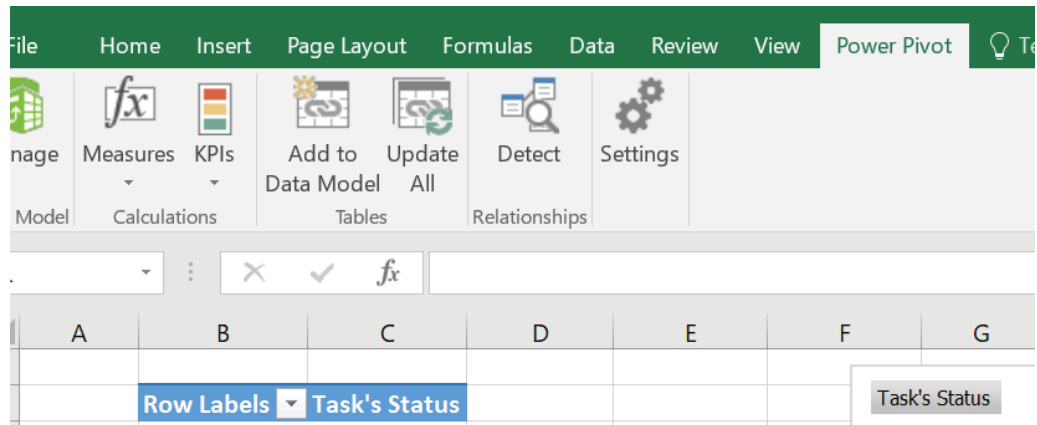


- Now the refreshed report can be Saved & data now available to Share the Report.

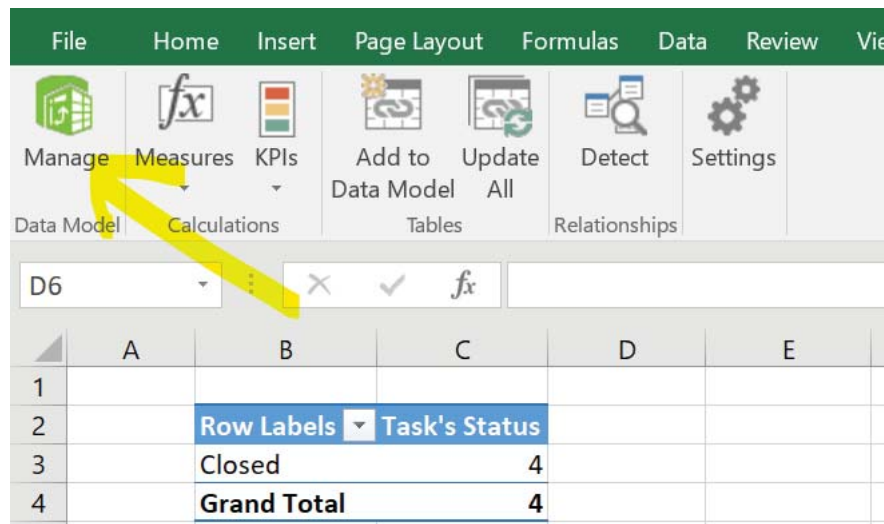


3.2. Modifying an Existing Template

- Open the report template
- Go to power Pivot tab



- Click on Manage Button





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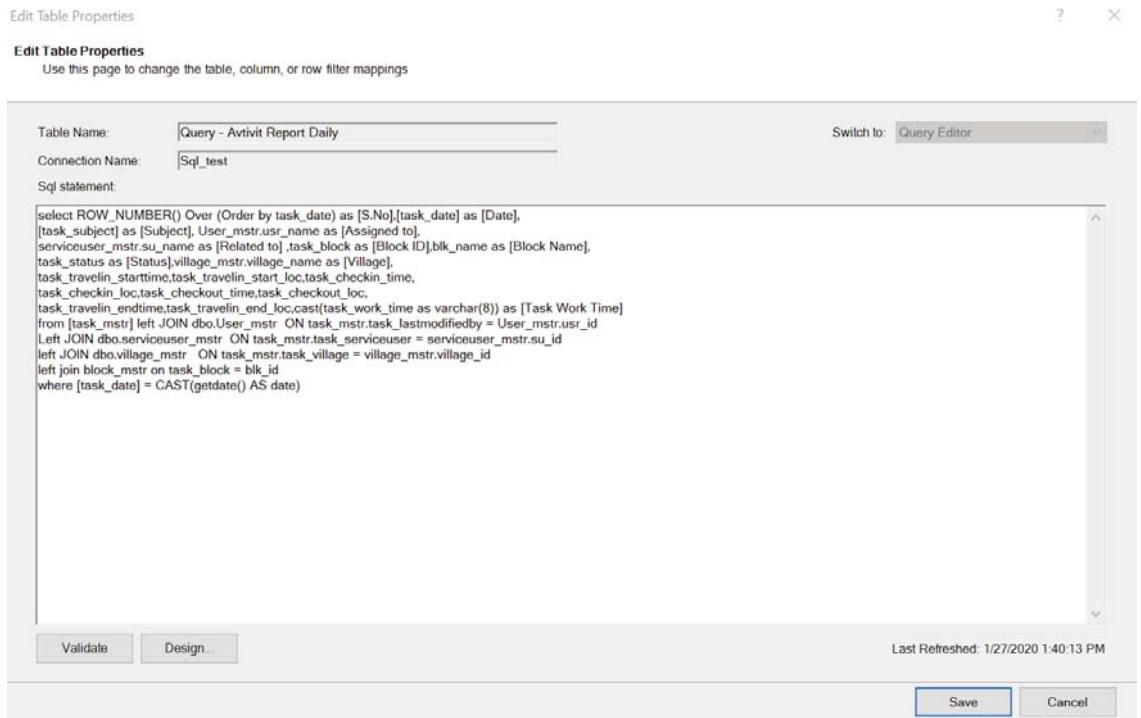
- Now we will be able to see all data model created earlier

| SNo | D... | S... | Assig... | Rel... | Bl... | Bloc... | S... | Vi... | task_travelin... |
|-----|------|--------|----------|------------|-------|---------|-----------|--------|------------------|
| 1 | 1 | 1/2... | Treat... | HST Kad... | kavi | B014 | Kadaya... | Closed | Alvar... |
| 2 | 2 | 1/2... | Treat... | HST Kad... | srija | B014 | Kadaya... | Closed | Atha... |
| 3 | 3 | 1/2... | Treat... | HST Kad... | srija | B014 | Kadaya... | Closed | Atha... |
| 4 | 4 | 1/2... | Treat... | HST Kad... | srija | B014 | Kadaya... | Closed | Atha... |

- Click on design Tab

| SNo | D... | S... | Assig... | Rel... | Bl... | Bloc... | S... | Vi... | task_travelin... | task_tr... |
|-----|------|--------|----------|------------|-------|---------|-----------|--------|------------------|------------|
| 1 | 1 | 1/2... | Treat... | HST Kad... | kavi | B014 | Kadaya... | Closed | Alvar... | |
| 2 | 2 | 1/2... | Treat... | HST Kad... | srija | B014 | Kadaya... | Closed | Atha... | |
| 3 | 3 | 1/2... | Treat... | HST Kad... | srija | B014 | Kadaya... | Closed | Atha... | |
| 4 | 4 | 1/2... | Treat... | HST Kad... | srija | B014 | Kadaya... | Closed | Atha... | |

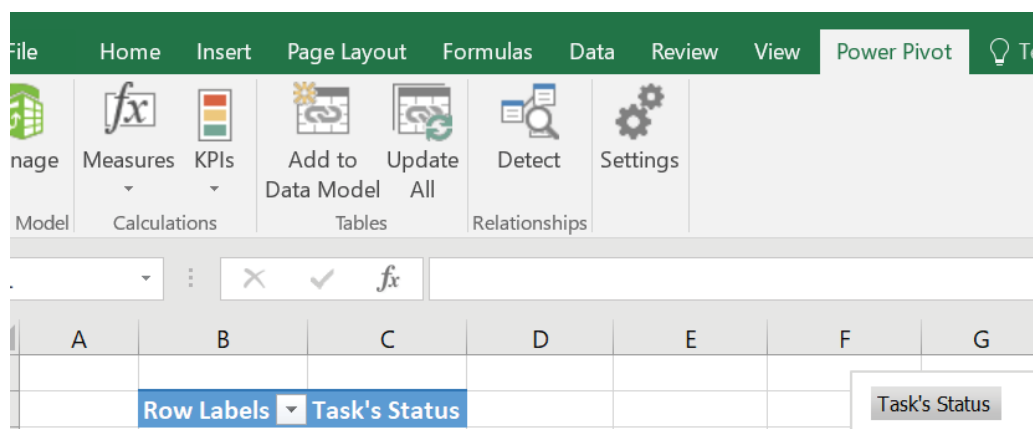
- Click on design Tab
- Then, click on Table Properties



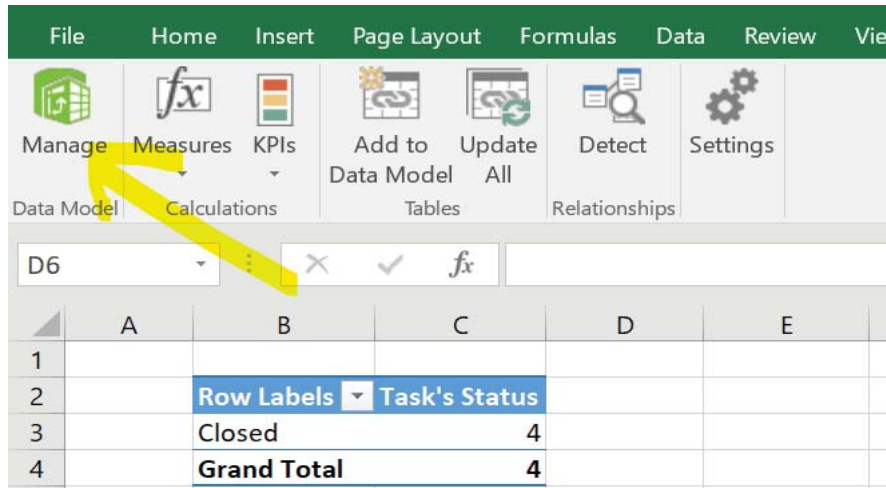
- Modify the query with Adding filters like
 - Period range
 - Status
 - Hierarchy
- Click on Save
- On Successful save, we will be getting the updated data model in same query tab.

3.2.1. Create New Report

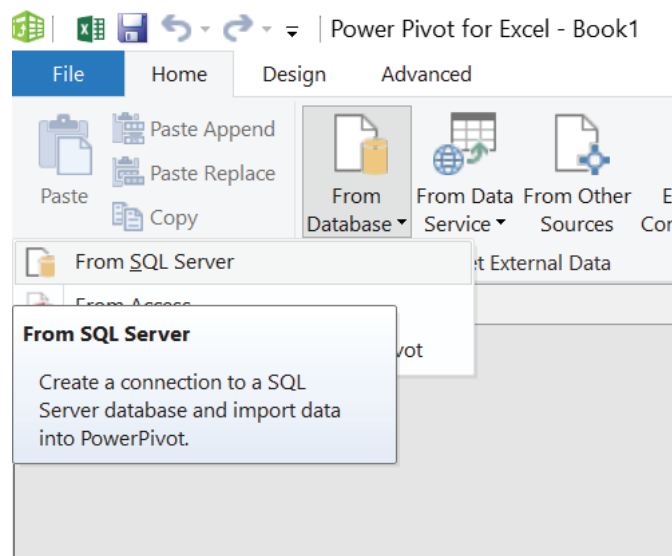
- Open Excel
- Go to power Pivot tab



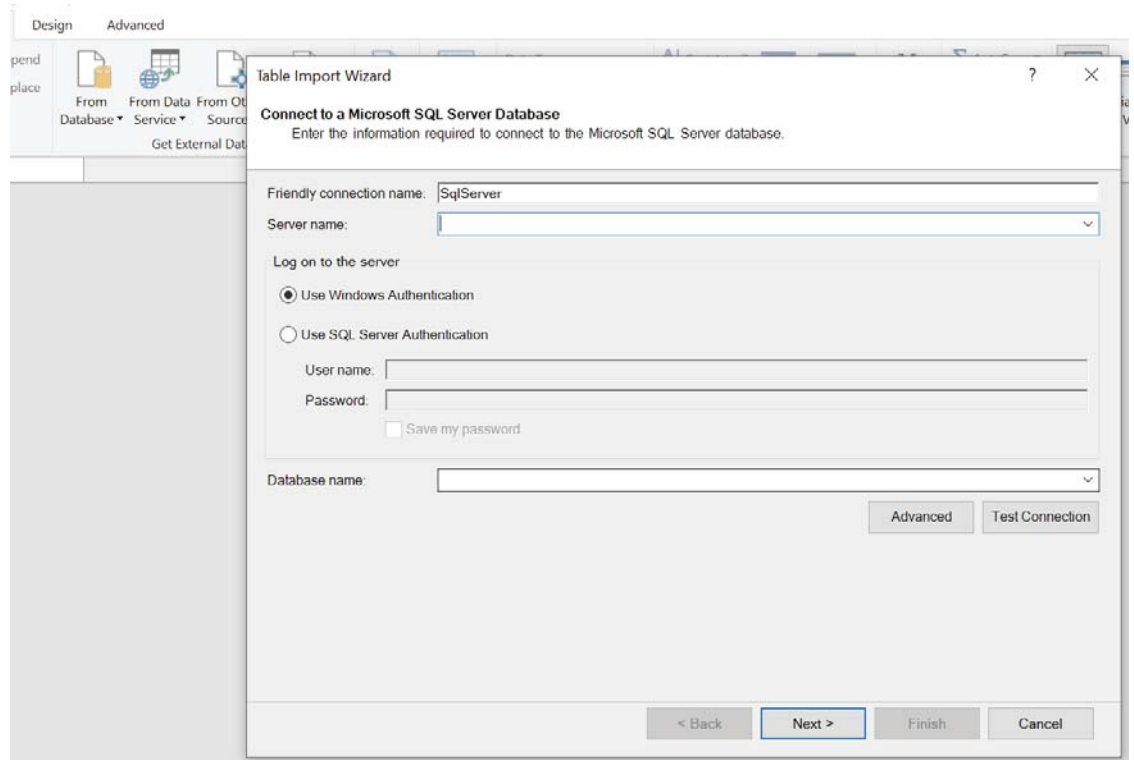
- Click on Manage Button



- Click on Home Tab
- Click on From Data base Icon
 - Click on from Sql Server



Now this Action will direct the page to Import Table Wizard.



- Give Friendly Connection Name Like. 'AWS-Prod'
- Server Name – enter the server name
- Select SQL Authentication
 - User ID
 - Password
- Select The Database either Test, Dev, demo, Prod etc.
- Click on Test Connection



Table Import Wizard

Connect to a Microsoft SQL Server Database
Enter the information required to connect to the Microsoft SQL Server database.

Friendly connection name: AWS
Server name: mymvbridb.cjb0veskscz0.ap-south-1.rds.amazonaws.com

Log on to the server

Use Windows Authentication
 Use SQL Server Authentication

User name: mymvbrid
Password: *****
 Save my password

Database name: mvbri_test

Advanced Test Connection

< Back Next > Finish Cancel

Power Pivot for Excel
Test connection succeeded.
OK

o Click on Next > Button

Table Import Wizard

Choose How to Import the Data
You can either import all of the data from tables or views that you specify, or you can write a query using SQL that specifies the data to import.

Select from a list of tables and views to choose the data to import

Write a query that will specify the data to import

< Back Next > Finish Cancel

- o Select write a query option.
- o Click on Next > Button



Now we have a window where the query to be entered as per the requirement.

- Let's take a query to get the task's for current day
- Copy the query into SQL Statement
- Click on Validate

Table Import Wizard

? X

Specify a SQL Query

Type or paste a SQL query to select data to import from the source database.

Friendly Query Name:

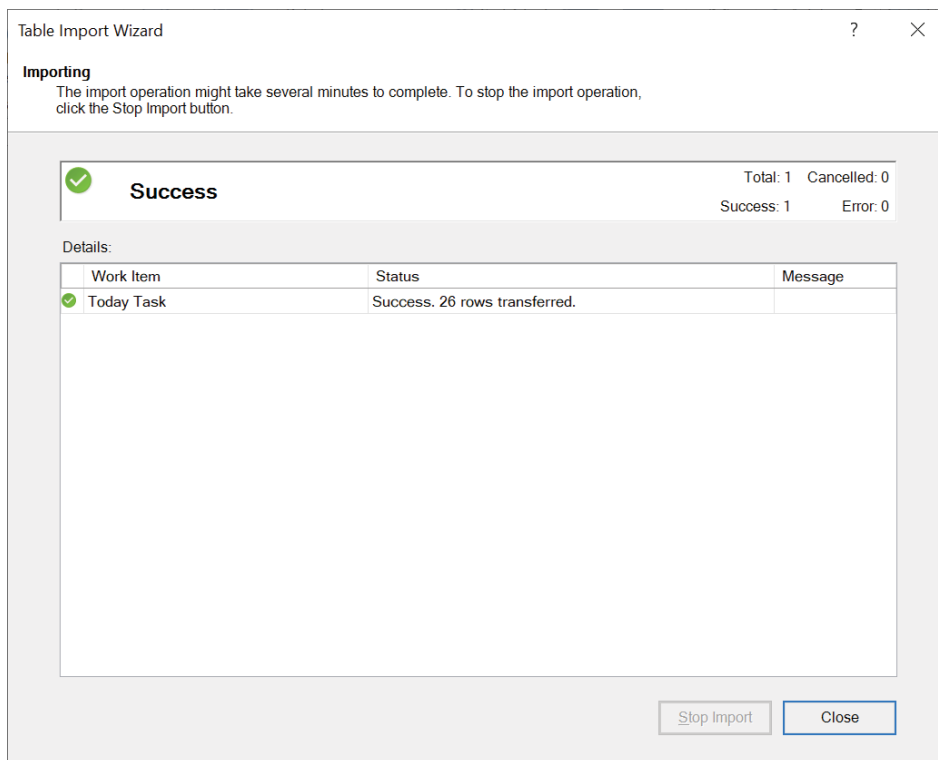
SQL Statement:

```
select ROW_NUMBER() Over (Order by task_date) as [S.No],[task_date] as [Date],
[task_subject] as [Subject], User_mstr.usr_name as [Assigned to],
serviceuser_mstr.su_name as [Related to],task_block as [Block ID],blk_name as [Block Name],
task_status as [Status],village_mstr.village_name as [Village],
task_travelin_starttime,task_travelin_start_loc,task_checkin_time,
task_checkin_loc,task_checkout_time,task_checkout_loc,
task_travelin_endtime,task_travelin_end_loc,cast(task_work_time as varchar(8)) as [Task Work Time]
from [task_mstr] left JOIN dbo.User_mstr ON task_mstr.task_lastmodifiedby = User_mstr.usr_id
Left JOIN dbo.serviceuser_mstr ON task_mstr.task_serviceuser = serviceuser_mstr.su_id
left JOIN dbo.village_mstr ON task_mstr.task_village = village_mstr.village_id
left join block_mstr on task_block = blk_id
where [task_date] = CAST(getdate() AS date)
```

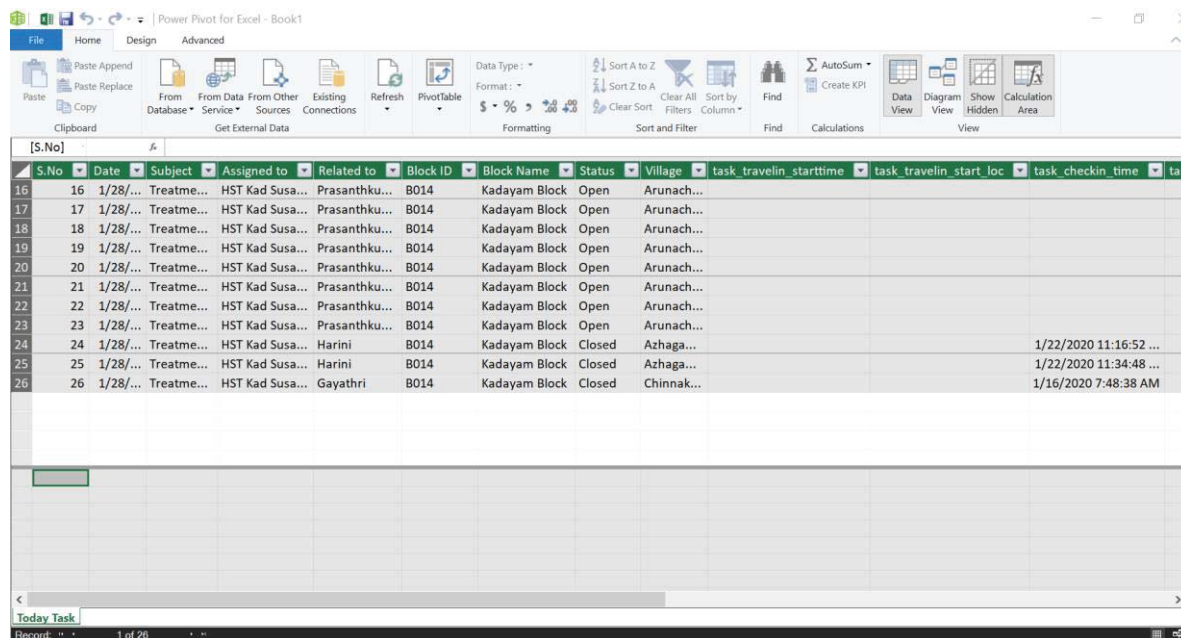
The SQL statement is valid.



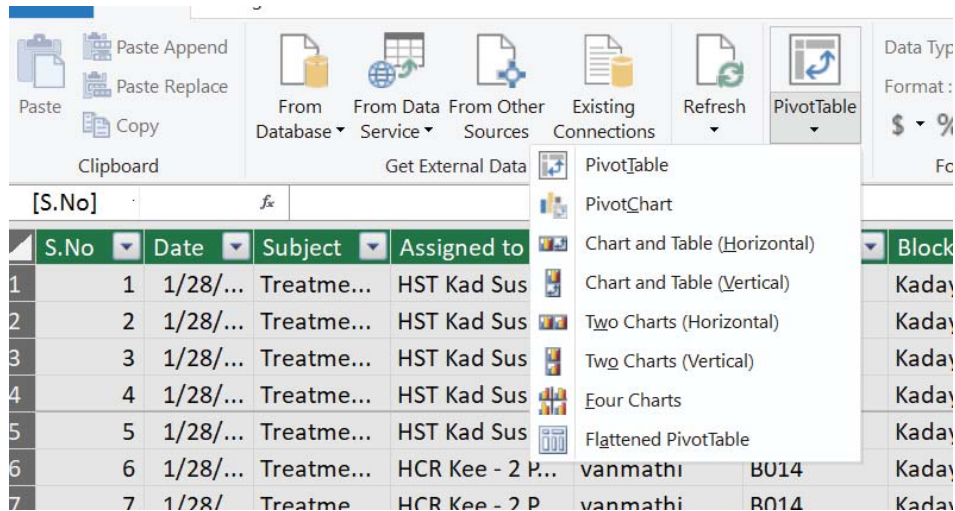
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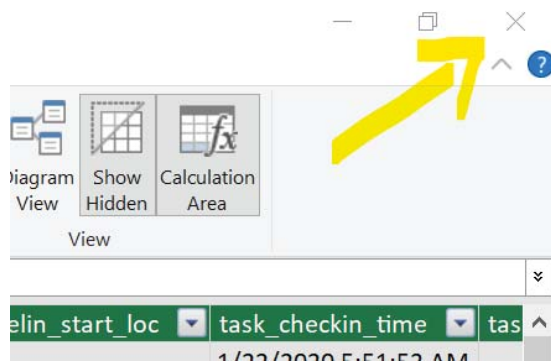
- Once successful validated, click on Finish.
- Query is saved with File and Model available for Report
- Click close button



- Now the data is available for Reports
- We have the Power Pivot options to select
 - Pivot table
 - Pivot Chart



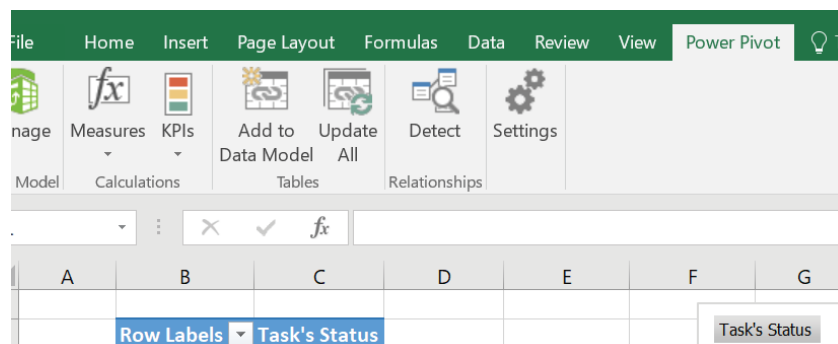
- Close the Power Pivot Window



- Save the File as Template.
- From Next time we can use this template by just click on refresh Button

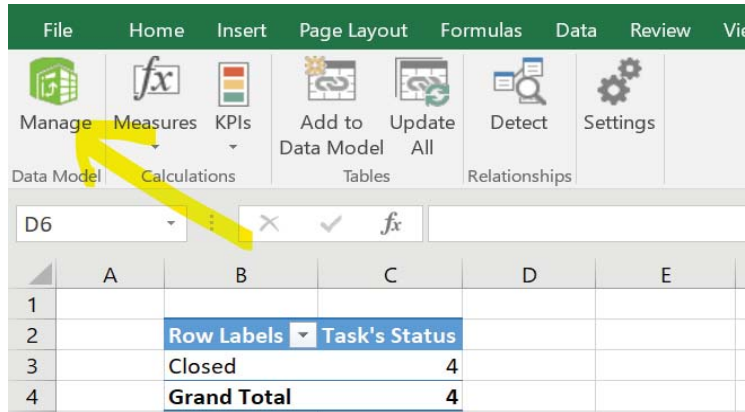
3.2.2. Extract Data from SQL Table

- Open Excel
- Go to power Pivot tab

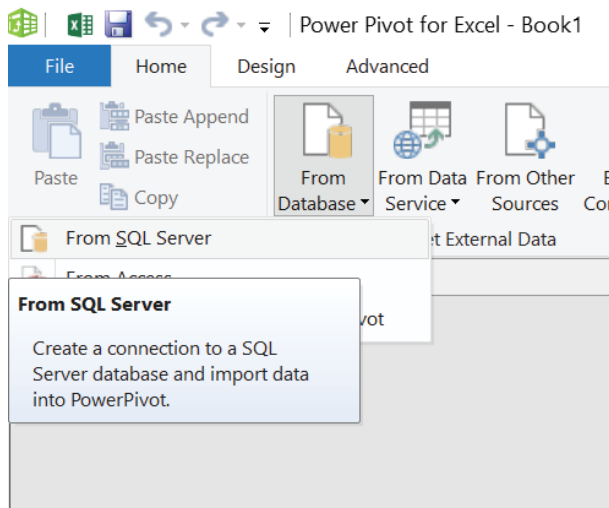




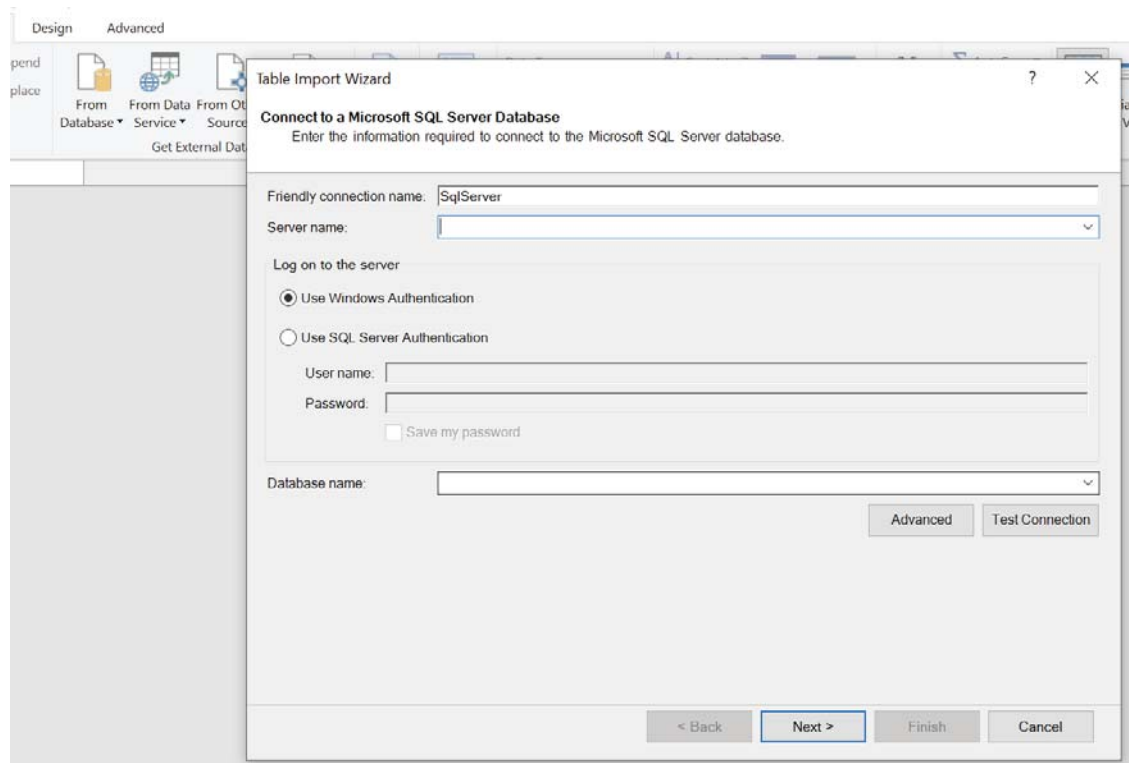
- Click on Manage Button



- Click on Home Tab
- Click on From Data base Icon
 - Click on from Sql Server



Now this Action will direct the page to Import Table Wizard.



- Give Friendly Connection Name Like. 'AWS-Prod'
- Server Name – enter the server name
- Select SQL Authentication
 - User ID
 - Password

Select The Database either Test, Dev, demo, Prod etc.

- Click on Test Connection



User Guide – Reports on Power Pivot

Table Import Wizard

Connect to a Microsoft SQL Server Database
Enter the information required to connect to the Microsoft SQL Server database.

Friendly connection name:

Server name:

Log on to the server

Use Windows Authentication

Use SQL Server Authentication

User name:

Password:

Save my password

Database name:

(from Power Pivot for Excel dialog)

(from Power Pivot for Excel dialog)

< Back Finish Cancel

o Click on Next > Button

Table Import Wizard

Choose How to Import the Data
You can either import all of the data from tables or views that you specify, or you can write a query using SQL that specifies the data to import.

Select from a list of tables and views to choose the data to import

Write a query that will specify the data to import

< Back Finish Cancel

- o Select From List of Table.
- o Click on Next > Button



Now we have a window where the Tables to select

- Let's take user Master table to get all user Details
- Click on Preview on selectable table
- Select The filters
 - On Fields
 - On Data

Table Import Wizard ? X

Select Tables and Views
Select the tables and views that you want to import data from.

Data Source: mymvbridb.cjb0veskscz0.ap-south-1.rds.amazonaws.com
Catalog: mvbri_test

Tables and Views:

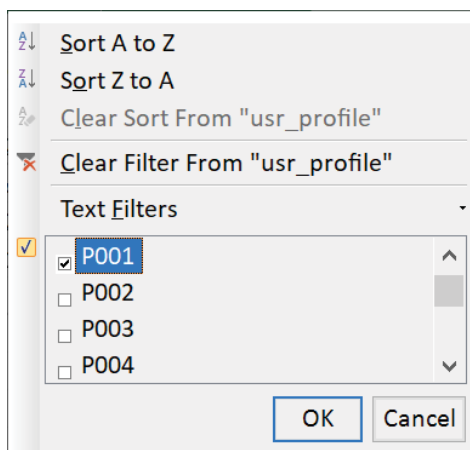
| <input type="checkbox"/> | Source Table | Schema | Friendly Name | Filter Details |
|-------------------------------------|------------------------------|--------|---------------|----------------|
| <input type="checkbox"/> | role_mstr | dbo | | |
| <input type="checkbox"/> | screening_det | dbo | | |
| <input type="checkbox"/> | screening_mstr | dbo | | |
| <input type="checkbox"/> | serviceuser_mstr | dbo | | |
| <input type="checkbox"/> | state_mstr | dbo | | |
| <input type="checkbox"/> | sysdiagrams | dbo | | |
| <input type="checkbox"/> | task_mstr | dbo | | |
| <input type="checkbox"/> | task_summary | dbo | | |
| <input type="checkbox"/> | treatment_mstr | dbo | | |
| <input type="checkbox"/> | treatmentEvaluation_dtl | dbo | | |
| <input type="checkbox"/> | treatmentevaluationscore_dtl | dbo | | |
| <input checked="" type="checkbox"/> | User_mstr | dbo | User_mstr | |
| <input type="checkbox"/> | userlogin_hist | dbo | | |
| <input type="checkbox"/> | village_mstr | dbo | | |

Table Import Wizard ? X

Preview Selected Table
Use the checkbox to select specific columns. To filter the data in a column, use the drop-down arrow for the column to select values that should be included.

Table Name: User_mstr

| | usr_user... | usr_firsn... | usr_lastn... | usr_pr... | usr_pass... | usr_n... | usr_p... | usr_m... | usr... | usr... |
|----|-------------|---------------------|-------------------|-------------|---------------------|---------------------|-----------------|----------|-----------|-----------|
| 1 | 0050I00... | pavi.pavi3@gm... | Pkalyanitest | P003 | \$2b\$10\$x4816N... | Pkalyanitest | | | Test user | pavi.pav |
| 2 | 0050I00... | annalakshmicrw... | HCR Kee - 1 | Annalakshmi | P002 | \$2b\$10\$x4816N... | HCR Kee - 1 ... | | | annalaks |
| 3 | 0050I00... | manimegalaicrw... | HCR Kee - 2 | Manimegalai | P002 | \$2b\$10\$x4816N... | HCR Kee - 2 ... | | | manimeg |
| 4 | 0050I00... | muthumaricrw... | HCR Kad | Muthumari | P002 | \$2b\$10\$x4816N... | HCR Kad M... | | | muthum |
| 5 | 0050I00... | gcrwmanimegal... | GHCR MA Thiru... | Manimegalai | P002 | \$2b\$10\$x4816N... | GHCR MA T... | | | gcrwmar |
| 6 | 0050I00... | gcrwkalaiselvi.a... | GHCR MA Chell... | Kalaiselvi | P003 | \$2b\$10\$x4816N... | GHCR MA C... | | | gcrwkala |
| 7 | 0050I00... | gcrwshanthi.am... | GHCR MA Kallik... | Shanthi | P002 | \$2b\$10\$lxrrVg... | GHCR MA K... | | | gcrwshai |
| 8 | 0050I00... | anpukodicrw.a... | HCR Ten | Anbukodi | P003 | \$2b\$10\$x4816N... | HCR Ten An... | | | anpukod |
| 9 | 0050I00... | karthickpt.amar... | HPT Vasu | Karthick | P002 | \$2b\$10\$x4816N... | HPT Vasu K... | | | karthickp |
| 10 | 0050I00... | sathyaftl@gmai... | FTL | Sathiya | P007 | \$2b\$10\$x4816N... | FTL Sathiya | | | sathyaftl |
| 11 | 0050I00... | sudarnangai.am... | HCR Ten | Sudarnangai | P004 | \$2b\$10\$x4816N... | HCR Ten Su... | | | sudarnai |
| 12 | 0050I00... | sermaselvicrw.a... | CSE ACHEN & M... | Sermaselvi | P004 | \$2b\$10\$x4816N... | CSE ACHEN ... | | | sermase |
| 13 | 0050I00... | soniampika.am... | CSE KAD & AMB | Soniambika | P005 | \$2b\$10\$x4816N... | CSE KAD & ... | | | soniamp |



- Select The filters
 - On Fields
 - On Data
- Filters can be seen in Query by clicking on ‘**Applied Filters**’

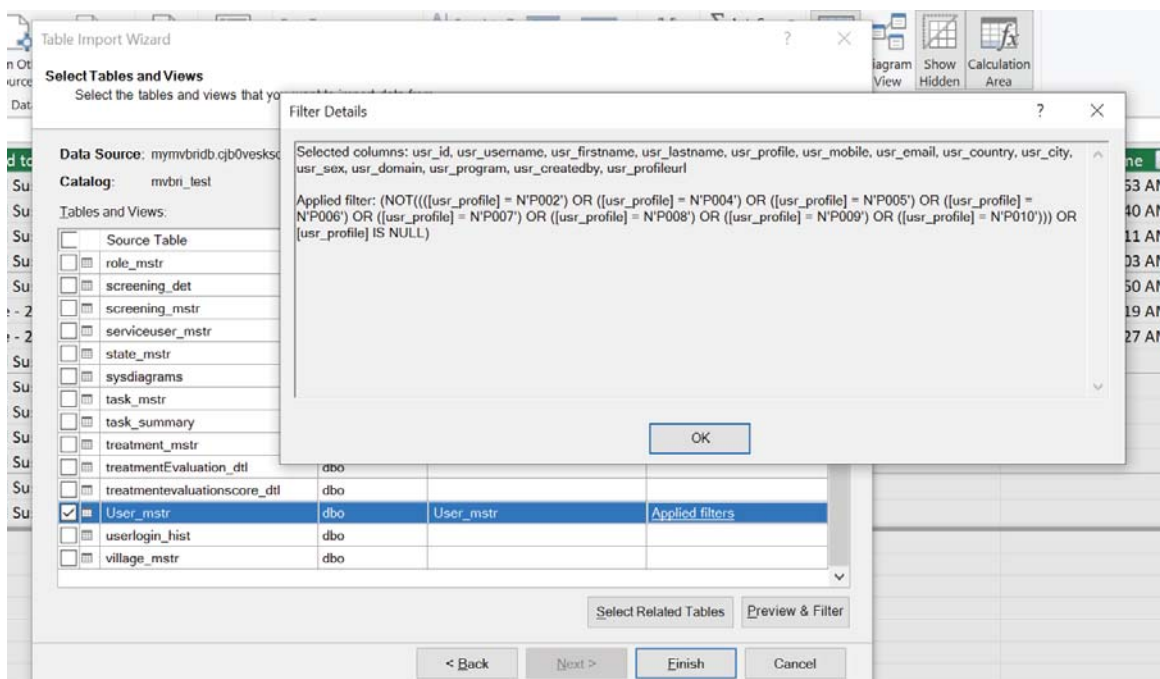




Table Import Wizard ? X

Importing
The import operation might take several minutes to complete. To stop the import operation, click the Stop Import button.

✓

Success

Total: 1 Canceled: 0

Success: 1 Error: 0

Details:

| Work Item | Status | Message |
|-------------|-------------------------------|---------|
| ✓ User_mstr | Success. 18 rows transferred. | |

Stop ImportClose

- Once successful review, click on Finish.
- Query is saved with File and Model available for Report
- Click close button



User Guide – Reports on Power Pivot

Power Pivot for Excel - Test1.xlsx

File Home Design Advanced

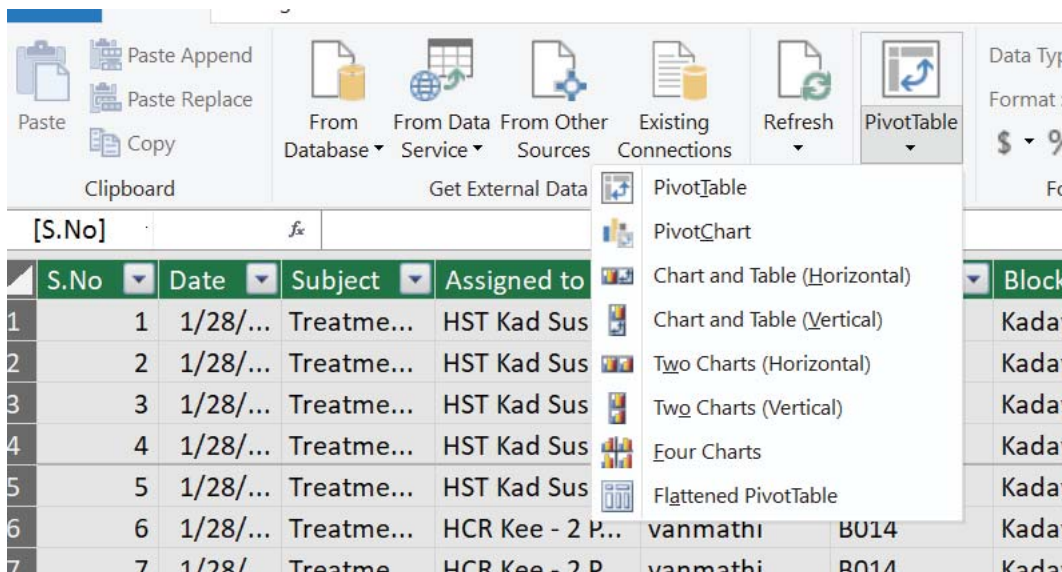
Paste Append Paste Replace Copy Clipboard From Database From Data Service From Other Sources Existing Connections Refresh PivotTable Data Type: Format: \$ % , .00 +.00 Formatting Sort A to Z Sort Z to A Clear All Filters Sort by Column Clear Sort

| | usr_id | usr_username | usr_firstname | usr_lastname | usr_profile | usr_mobile | usr_email | usr_co |
|----|------------|---------------------|-------------------|-----------------|-------------|------------|----------------|--------|
| 1 | 0050100... | pavi.pavi3@gm... | | Pkalyanitest | P003 | | pavi.pavi3... | C001 |
| 2 | 0050100... | gcrwkalaiselvi.a... | GHCR MA Chell... | KalaiSelvi | P003 | | gcrwkalaise... | C001 |
| 3 | 0050100... | anpukodicrw.a... | HCR Ten | Anbukodi | P003 | | anpukodicr... | C001 |
| 4 | 0050100... | suganya.amarse... | HST Kee - 2 | SuganyaKee | P003 | | suganya.a... | C001 |
| 5 | 0050100... | rani.amarseva... | CPT KAD & AMB | Rani | P003 | | rani.amars... | C001 |
| 6 | 0050100... | yazhini.amarsev... | HPT Kee - 2 | Yazhini | P003 | | yazhini.am... | C001 |
| 7 | 0050100... | mirdulapt.amar... | HPT Kee - 1 | MirudulaPT | P003 | | mirdulapt.a... | C001 |
| 8 | 0050100... | mariammalpt.a... | HPT KAD | MariammalKad | P003 | | mariammal... | C001 |
| 9 | 0050100... | inthiracrw.amar... | CCR PKDY | InthiraVas | P003 | | inthiracrw... | C001 |
| 10 | 0050100... | sivaranjani.ama... | HST Vasu | Sivaranjani | P003 | | sivaranjani... | C001 |
| 11 | 005280... | mis.amar@ama... | Admin | User | P001 | | mis.amar@... | C001 |
| 12 | 005280... | secretary.amar... | Sankara | Raman | P001 | | secretary.a... | C001 |
| 13 | 005280... | shanmugasund... | HCR Kdnl | Shanmugasund... | P003 | | shanmugas... | C001 |
| 14 | 005280... | renuga.amarsev... | CPT ASSA & SUR... | Renuga | P003 | | renuga.am... | C001 |
| 15 | 005280... | akilacrw.amarse... | HCR San | Akila | P003 | | akilacrw.a... | C001 |

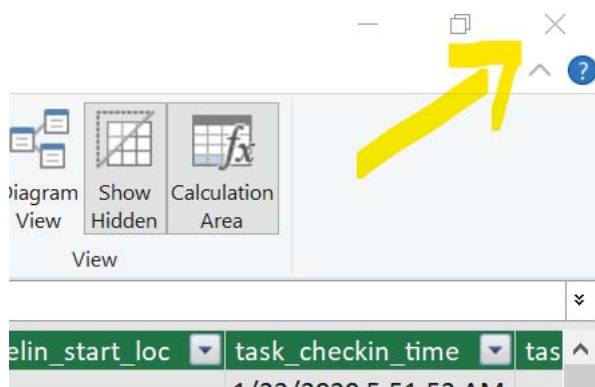
Today Task **User mstr**

Record: " " 1 of 18 " "

- Now the data is available for Reports
- We have the Power Pivot options to select
 - Pivot table
 - Pivot Chart



- Close the Power Pivot Window



- Save the File as Template.
- From Next time we can use this template by just click on refresh Button

4. Annexures

NA