USING PIVOT TABLES FOR INVENTORY CALCULATION AND CURRENCY COMPARISON

Summary:

This Project showcases the use of Pivot Tables (Created using Web Pivot Table), to perform inventory management and cost analysis.

Highlights of actions:

1. **Loading the Data Cube**

    a. Selected the preloaded OLAP cube to create the pivot table.

    b. Explored the data cube.

2. **Created the Pivot Table**

Created a customized pivot table that showed the following:

    a. "Promotions" dimension in the Fields List.

    b. "Promotions" field inside the "Promotions" dimensions in the Rows area.

    c. "Delivery Date" dimension in the Fields List.

    d. Measures in the Fields List.

    e. "Average Sales Amount" in the values area

3. **Extended the Pivot Table**

    a. Added "Source Currency" level from the Source Currency dimension to the Filters area.

    b. Created a filter such that the pivot table displays value only for "Canadian Dollar" and "US Dollar".

4. **Extended the Pivot Table with Filter Changes and Rollups**

    a. Modified the filter to show results only for the source Currency "EURO".

    b. Collapsed all reseller promotions except for Excess Inventory. Showed only the subcategories within the Excess Inventory item.

    c. Removed the pivot chart so that the sheet only displays the pivot table.

Screenshots:

First screenshot

	All Periods									
⊟ All Promotions	$3,590.42	$4,484.31	$5,727.83	$4,197.65	$3,105.24	$4,441.60	$3,575.40	$2,412.12	$3,415.14	$3,110.92
⊟ No Discount	$3,407.78	$4,007.91	$5,289.69	$3,735.02	$2,939.88	$4,319.94	$3,444.39	$2,356.91	$3,354.99	$3,052.51
⊟ Reseller	$2,474.75	$4,416.00	$3,886.08	$4,406.66	$2,082.00	$2,110.07	$1,953.38	$1,250.55	$1,590.88	$1,311.17
⊟ Discontinued Product	$3,218.92									
Mountain-100 Clea…	$10,455.32									
Mountain-500 Silve…	$417.73									
⊟ Excess Inventory	$819.44	$924.91	$751.04							
Road-650 Overstock	$819.44	$924.91	$751.04							
⊟ New Product	$7,184.00	$8,419.12	$8,010.33	$6,375.83	$1,836.83					
Touring-3000 Prom…	$3,785.88	$4,429.97	$3,838.18	$3,557.97	$742.35					
Touring-1000 Prom…	$5,371.27	$5,531.04	$6,025.90	$4,926.44	$2,384.07					
⊟ Seasonal Discount	$250.75	$250.75								
Sport Helmet Disco…	$206.91	$206.91								
Sport Helmet Disco…	$303.36	$303.36								
⊟ Volume Discount	$2,166.60	$4,042.45	$3,191.03	$3,511.68	$2,085.39	$2,110.07	$1,953.38	$1,250.55	$1,590.88	$1,311.17
Volume Discount 1…	$1,851.21	$3,158.55	$2,844.99	$2,853.76	$1,516.82	$1,775.85	$1,795.21	$1,215.43	$1,524.28	$1,251.88
Volume Discount 1…	$2,990.33	$4,936.52	$2,529.87	$3,377.11	$4,783.66	$3,558.51	$2,285.79	$1,487.06	$2,367.85	$1,836.43
Volume Discount 2…	$1,748.57	$690.36	$982.53	$2,573.99	$4,758.23	$1,251.09	$691.28	$478.67		
Volume Discount 4…	$868.49									

Fields List | Grid Options

Search

⊟ Ⓢ Measures
☐ Ⓜ Amount
☐ Ⓜ Average Rate
☑ Ⓜ Average Sales Amount
☐ Ⓜ Average Unit Price
☐ Ⓜ Customer Count
☐ Ⓜ Discount Amount
☐ Ⓜ Discount Percentage
☐ Ⓜ End of Day Rate
☐ Ⓜ Expense to Revenue Ratio
☐ Ⓜ Extended Amount
☐ Ⓜ Freight Cost

Drag fields between areas

▼ Filters | ▥ Columns
| | Ⓗ Delivery
| | Date.Month of Year ⊗
| | Ⓛ (All) ⊗
| | Ⓛ Month of Year ⊗

⊟ Rows | Σ Values
Ⓗ Promotions ⊗ | Ⓜ Average Sales ⊗
Ⓛ (All) ⊗ | Amount
Ⓛ Category ⊗
Ⓛ Type ⊗
Ⓛ Promotion ⊗

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Second screenshot

	All Periods									
⊟ All Promotions	$4,331.38	$5,485.85	$7,048.03	$4,974.65	$3,788.71	$5,520.58	$4,192.04	$2,828.23	$4,206.93	$3,629.64
⊟ No Discount	$4,111.90	$4,904.10	$6,595.94	$4,456.80	$3,576.11	$5,389.99	$4,024.12	$2,760.06	$4,122.43	$3,551.38
⊟ Reseller	$2,667.13	$4,999.50	$3,627.81	$4,741.38	$2,193.95	$2,088.10	$2,142.87	$1,358.94	$1,656.81	$1,393.44
⊟ Discontinued Product	$3,589.83									
Mountain-100 Clea…	$10,455.32									
Mountain-500 Silve…	$421.13									
⊟ Excess Inventory	$796.18	$822.14	$779.86							
Road-650 Overstock	$796.18	$822.14	$779.86							
⊟ New Product	$6,969.55	$10,428.79	$6,808.83	$6,253.15	$2,384.07					
Touring-3000 Prom…	$3,761.72	$5,589.74	$3,383.92	$3,477.77						
Touring-1000 Prom…	$5,277.55	$6,873.46	$5,259.63	$4,896.13	$2,384.07					
⊟ Seasonal Discount	$224.90	$224.90								
Sport Helmet Disco…	$199.05	$199.05								
Sport Helmet Disco…	$261.54	$261.54								
⊟ Volume Discount	$2,379.28	$4,904.20	$3,251.99	$3,943.75	$2,191.59	$2,088.10	$2,142.87	$1,358.94	$1,656.81	$1,393.44
Volume Discount 1…	$2,002.66	$3,743.68	$2,934.20	$3,124.29	$1,571.08	$1,829.61	$2,001.48	$1,309.59	$1,541.59	$1,314.79
Volume Discount 1…	$3,017.97	$5,586.41	$2,285.43	$3,438.79	$4,841.48	$2,861.50	$2,086.70	$1,665.11	$2,768.82	$1,952.84
Volume Discount 2…	$1,793.25	$667.80	$835.15	$2,573.99	$4,758.23	$1,482.95	$633.95	$478.67		
Volume Discount 4…	$868.49									

Search

⊟ Ⓢ Measures
⊞ Ⓓ Account
⊞ Ⓓ Customer
⊞ Ⓓ Date
⊞ Ⓓ Delivery Date
⊞ Ⓓ Department
⊞ Ⓓ Destination Currency
⊞ Ⓓ Employee
⊞ Ⓓ Geography
⊞ Ⓓ Internet Sales Order Details
⊞ Ⓓ Organization
⊞ Ⓓ Product
⊟ Ⓓ Promotion

Drag fields between areas

▼ Filters | ▥ Columns
Ⓗ Source Currency ⊗ | Ⓗ Delivery ⊗
Ⓛ Source Currency ⊗ | Date.Month of Year
| | Ⓛ (All) ⊗
| | Ⓛ Month of Year ⊗

⊟ Rows | Σ Values
Ⓗ Promotions ⊗ | Ⓜ Average Sales ⊗
Ⓛ (All) ⊗ | Amount
Ⓛ Category ⊗
Ⓛ Type ⊗
Ⓛ Promotion ⊗

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Screenshot 2

Connect to data source: Choose here | Open Dialog
Load a wpt file: Choose here | Open Dialog

English | Chinese | Toggle Panel | Reset | Save

	All Periods									
All Promotions	$15,181.20	$22,367.74	$18,716.84	$9,671.04	$15,891.07	$19,594.37	$12,399.37	$11,665.51	$12,639.93	$11,273.78
No Discount	$13,185.02	$15,553.47	$13,697.19	$7,820.78	$13,659.27	$16,164.42	$12,312.02	$11,582.86	$11,577.98	$11,273.78
Reseller	$8,579.23	$14,991.38	$15,581.49	$4,553.44	$7,811.32	$12,862.34	$1,135.64	$454.57	$8,495.60	
Discontinued Product	$316.39									
Mountain-500 Silve...	$316.39									
Excess Inventory	$1,315.42	$1,315.42								
Road-650 Overstock	$1,315.42	$1,315.42								
New Product	$10,310.87	$15,750.65	$11,484.55	$5,873.31						
Touring-3000 Prom...	$5,702.64	$6,341.52	$9,015.38	$2,669.12						
Touring-1000 Prom...	$5,964.51	$9,409.13	$4,272.25	$5,340.32						
Seasonal Discount	$445.07	$445.07								
Sport Helmet Disco...	$348.22	$348.22								
Sport Helmet Disco...	$477.35	$477.35								
Volume Discount	$6,676.94	$6,152.31	$10,329.53	$835.85	$7,811.32	$12,862.34	$1,135.64	$454.57	$8,495.60	
Volume Discount 1...	$5,101.68	$4,514.57	$11,432.16	$422.82	$2,503.55	$6,430.31	$477.39	$214.79	$16,261.26	
Volume Discount 1...	$2,711.98	$1,380.57	$1,203.35	$830.95	$7,077.03	$8,576.03	$658.26	$479.57	$729.93	
Volume Discount 2...	$1,668.83	$1,028.70	$2,308.95							

Search

- Reseller
- Reseller Sales Order Details
- Sales Channel
- Sales Reason
- Sales Summary Order Details
- Sales Territory
- Scenario
- Ship Date
- Source Currency
  - Source Currency
    - (All)
    - Source Currency
  - Source Currency Code

Drag fields between areas

Filters
- (H)Source Currency
- (L)Source Currency

Columns
- (H)Delivery
- Date.Month of Year
- (L)(All)
- (L)Month of Year

Rows
- (H)Promotions
- (L)(All)
- (L)Category
- (L)Type
- (L)Promotion

Values
- (M)Average Sales Amount

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Load a wpt file: [Choose here ▾] [Open Dialog]

[English] [Chinese] [Toggle Panel] [Reset] [Save]

⊟ All Promotions	16.84	$9,671.04	$15,891.07	$19,594.37	$12,399.37	$11,665.51	$12,639.93	$11,273.78	$18,111.11	$15,767.10	$12,405.20
⊟ No Discount	97.19	$7,820.78	$13,659.27	$16,164.42	$12,312.02	$11,582.86	$11,577.98	$11,273.78	$16,242.67	$14,989.19	$12,374.39
⊟ Reseller	81.49	$4,553.44	$7,811.32	$12,862.34	$1,135.64	$454.57	$8,495.60		$5,138.22	$3,306.10	$338.99
⊟ Discontinued Product										$305.09	$338.99
Mountain-500 Silve…										$305.09	$338.99
⊟ Excess Inventory											
Road-650 Overstock											
⊟ New Product	84.55	$5,873.31									
Touring-3000 Prom…	15.38	$2,669.12									
Touring-1000 Prom…	72.25	$5,340.32									
⊟ Seasonal Discount											
Sport Helmet Disco…											
Sport Helmet Disco…											
⊟ Volume Discount	29.53	$835.85	$7,811.32	$12,862.34	$1,135.64	$454.57	$8,495.60		$5,138.22	$4,204.74	
Volume Discount 1…	32.16	$422.82	$2,503.55	$6,430.31	$477.39	$214.79	$16,261.26		$4,723.33	$3,839.77	
Volume Discount 1…	03.35	$830.95	$7,077.03	$8,576.03	$658.26	$479.57	$729.93		$553.19	$547.45	
Volume Discount 2…	08.95										

Search ▢

⊞ ⓓ Reseller
⊞ ⓓ Reseller Sales Order Details
⊞ ⓓ Sales Channel
⊞ ⓓ Sales Reason
⊞ ⓓ Sales Summary Order Details
⊞ ⓓ Sales Territory
⊞ ⓓ Scenario
⊞ ⓓ Ship Date
⊟ ⓓ Source Currency
 ⊟ ☑ ⓗ Source Currency
  ☐ ⓛ (All)
  ☑ ⓛ Source Currency
 ⊞ ☐ ⓗ Source Currency Code

Drag fields between areas

▽ Filters
ⓗ Source Currency ⊗
 ⓛ Source Currency ⊗

▥ Columns
ⓗ Delivery ⊗
 Date.Month of Year ⊗
  ⓛ (All) ⊗
  ⓛ Month of Year ⊗

▤ Rows
ⓗ Promotions ⊗
 ⓛ (All) ⊗
 ⓛ Category ⊗
 ⓛ Type ⊗
 ⓛ Promotion ⊗

Σ Values
ⓜ Average Sales ⊗
 Amount

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