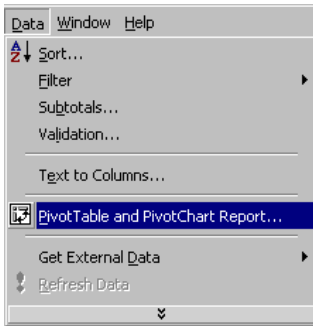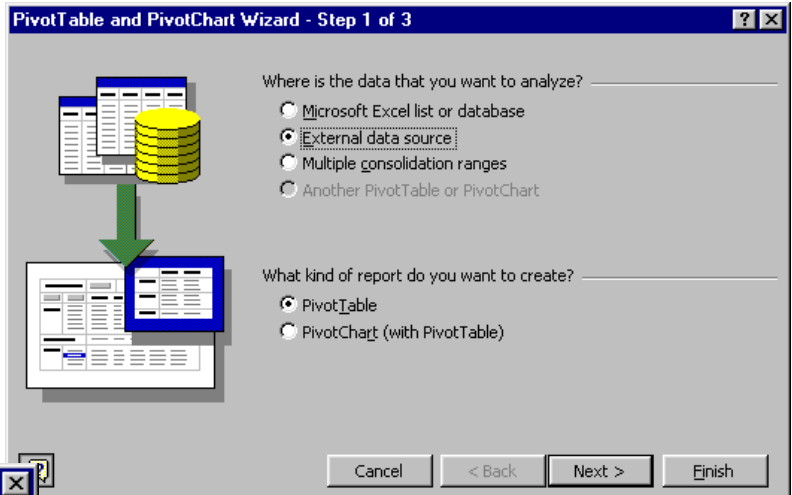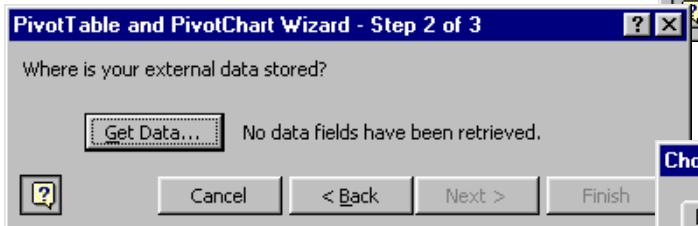**CONNX®**
Solutions™
Simplified Data Access™

1. Create a new worksheet in Microsoft Excel. Select **PivotTable and PivotChart Report** on the **Data** menu to open the **PivotTable and PivotChart Wizard.**
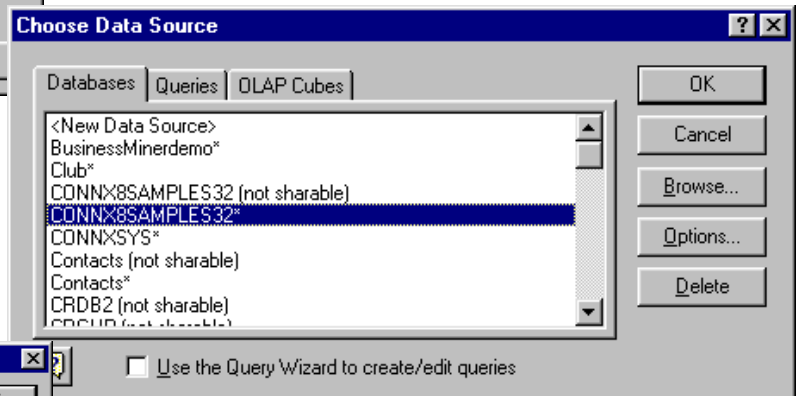
2. Select **External Data Source** in Step 1 of the PivotTable and PivotChart Wizard, and then click the **Next** button.
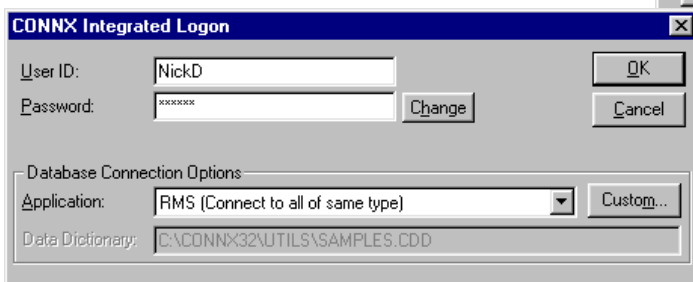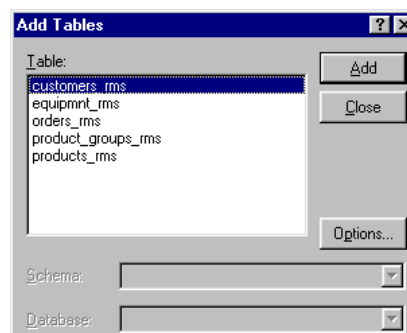
3. Click the **Get Data** button in Step 2.

4. Select a data source from the list in the **Choose Data Source** dialog box, and then click the **OK** button.

5. Log on to the CONNX database using the CONNX user name and password. If required, select an application type in the **Connect Options** list box. Click the **OK** button.

6. Select a table or tables in the **Add Tables** dialog box. Click the **Add** button, and then click the **Close** button.

7. Double-click field names in the tables displayed in the upper pane of the Microsoft Query window to add them to the query. Drag the field names to create joins, or double-click the join line to edit the type of join.

8. Select the join type in the **Joins** dialog box. Click the **Add** button to add a join, and then click the **Close** button to return to the Microsoft Query window. Save and name the query. Close the Microsoft Query wndow to return to Microsoft Excel.

9. Click the **Next** button.

10. In Step 3, select a location in which to save the PivotTable, either as a new worksheet or as the worksheet currently open. Click the **Layout** button to design the positioning of the fields in your PivotTable.
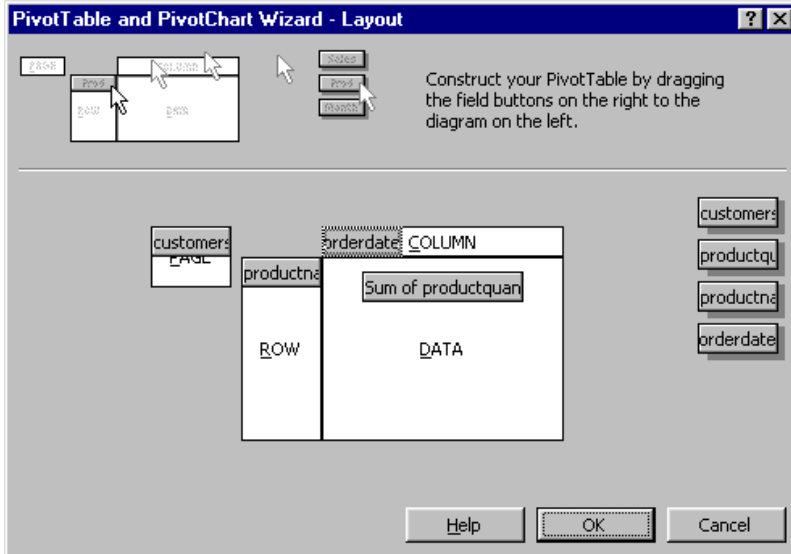
11. Drag the field names displayed on the right into the diagram, placing them in logical positions for the results you need. Click the **OK** button, and then click the **Finish** button in the **PivotTable and PivotChart Wizard** dialog box.

12. The PivotTable appears as an Excel worksheet. To change the location of the fields and rows, select the field name and then drag the field to a selected location. In this case, the Customer State field could be moved to the data field, so that the Customer State field appears in the main body of the table. Any of the selected fields in a PivotTable can be interchanged to yield different results from the same data.