# QUICK START: Utility Management - Penalty Trending

Description

In this example, you will look at the penalty charges. You will look at results for one year and then create a yearly trend graph at different levels of granularity.
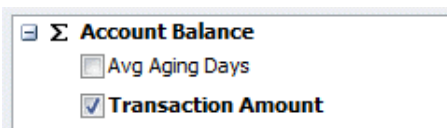
Walkthrough

Open the **UM PenaltyTrending.xlsx** template. Change the data source to the General Ledger cube as outlined in the Changing a Template's Data Source Quick Start.
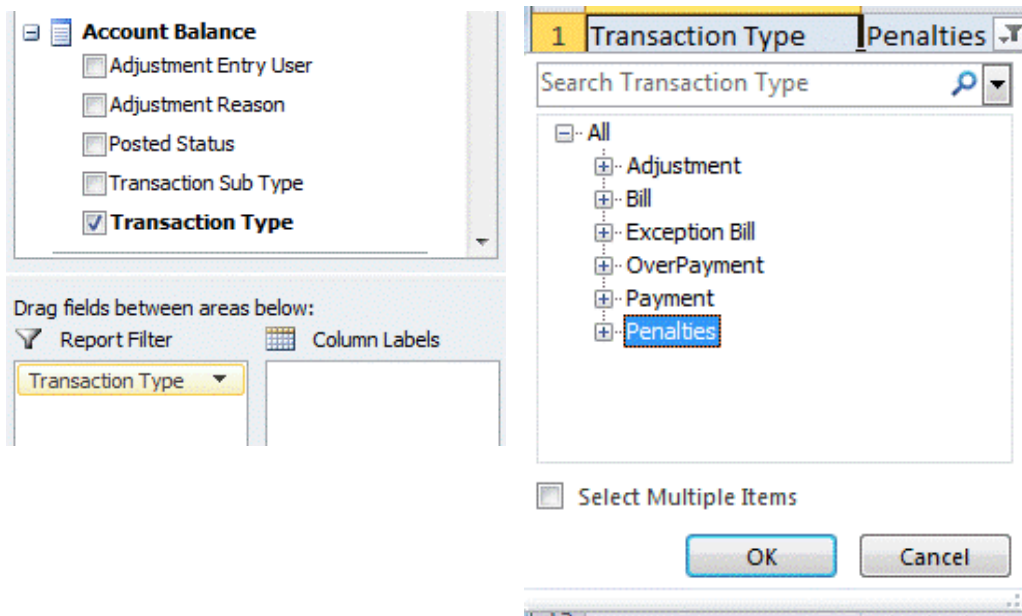
You should see the pivot table below:.
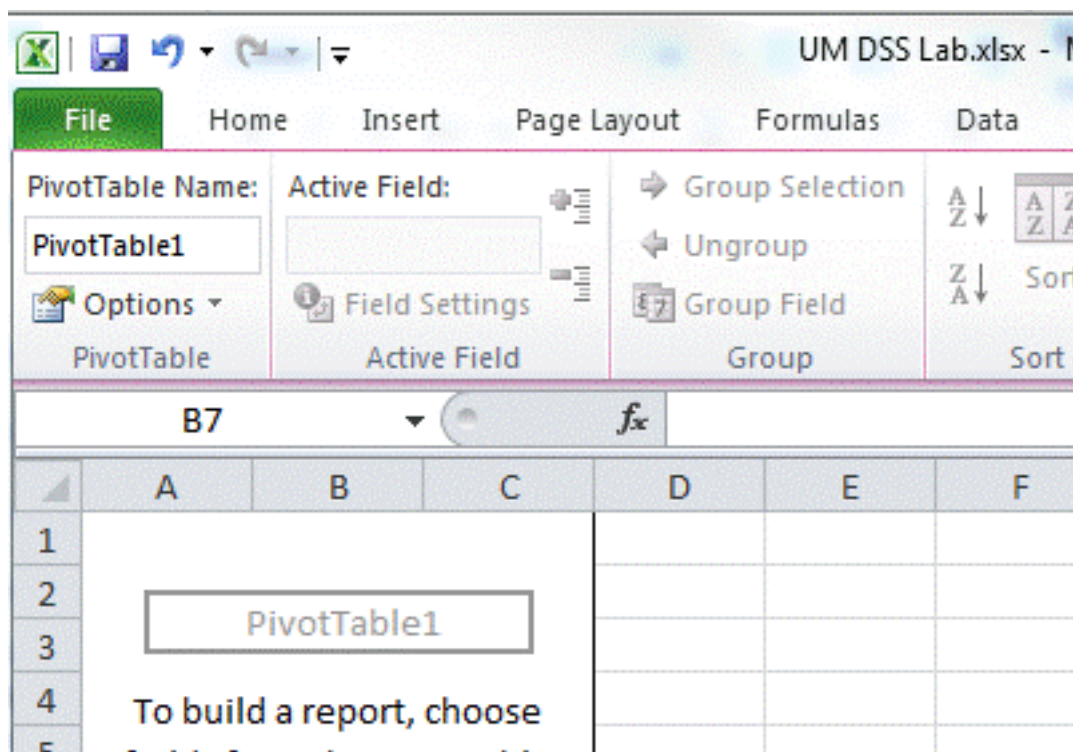
First, add the **Transaction Amount** to the pivot table from the **Account Balance** measures.
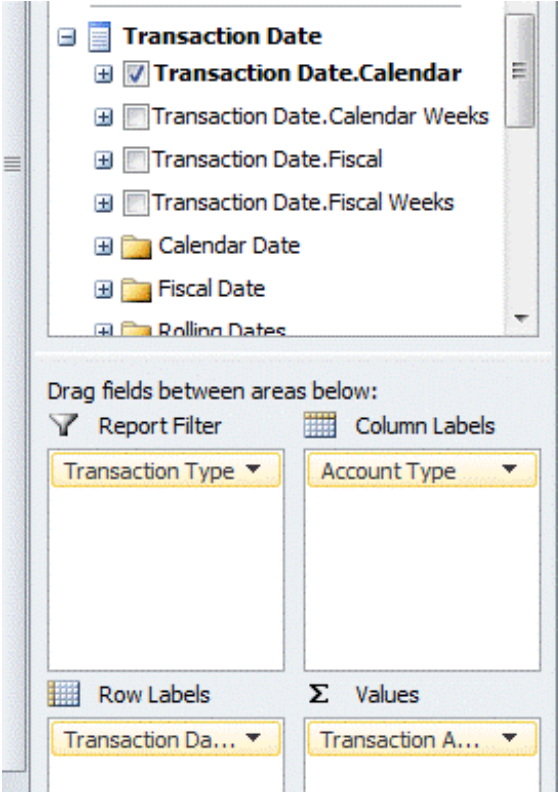
Next, filter by **Transaction Type** by dragging it from the **Account Balance** dimension to the Report Filter area. Then, select Penalties from the filter on the pivot table.

Next, break the charges down to **Account Type** by dragging it from **Utility Account** dimension, under the **Account Details** folder to the **Row Labels** area.
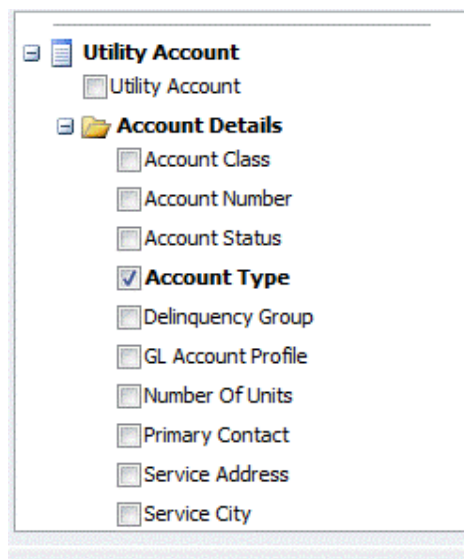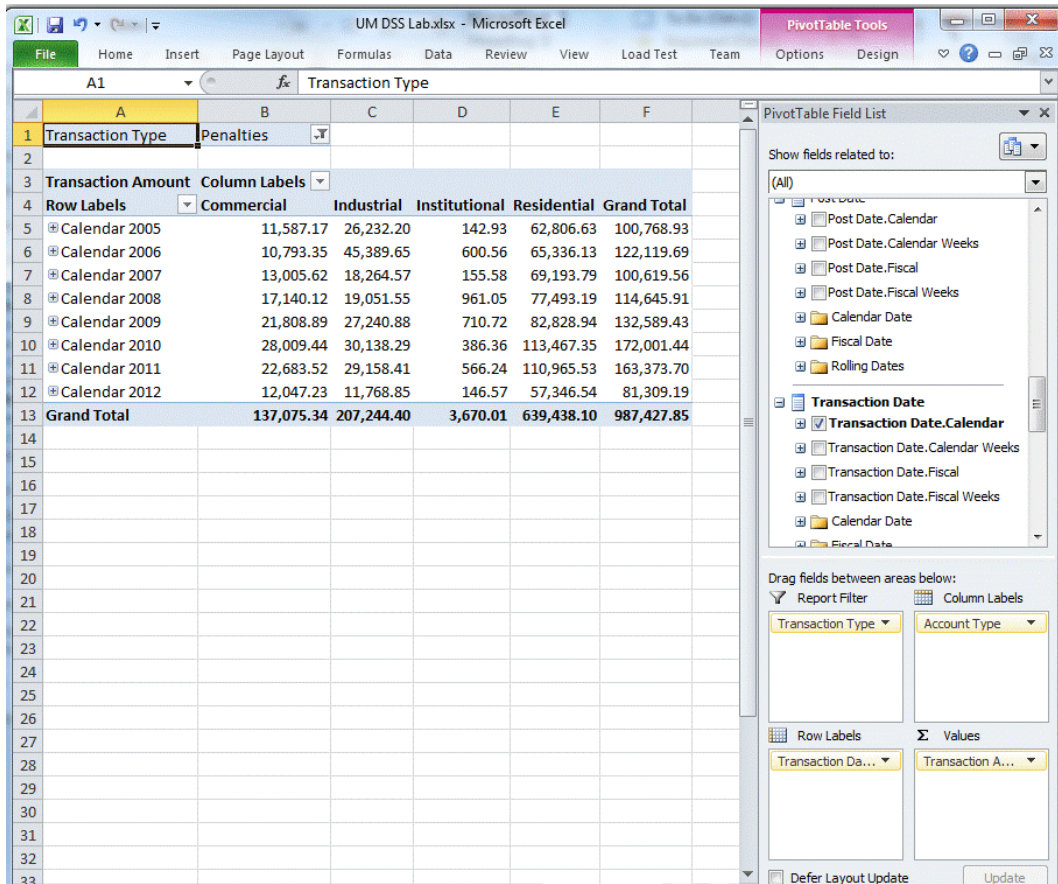
Drag the **Transaction Date.Calendar** field from the **Row Labels** area to trend by year.
Move the **Account Type** from **Row Labels** to **Column Labels**.

You should see a result similar to the following:

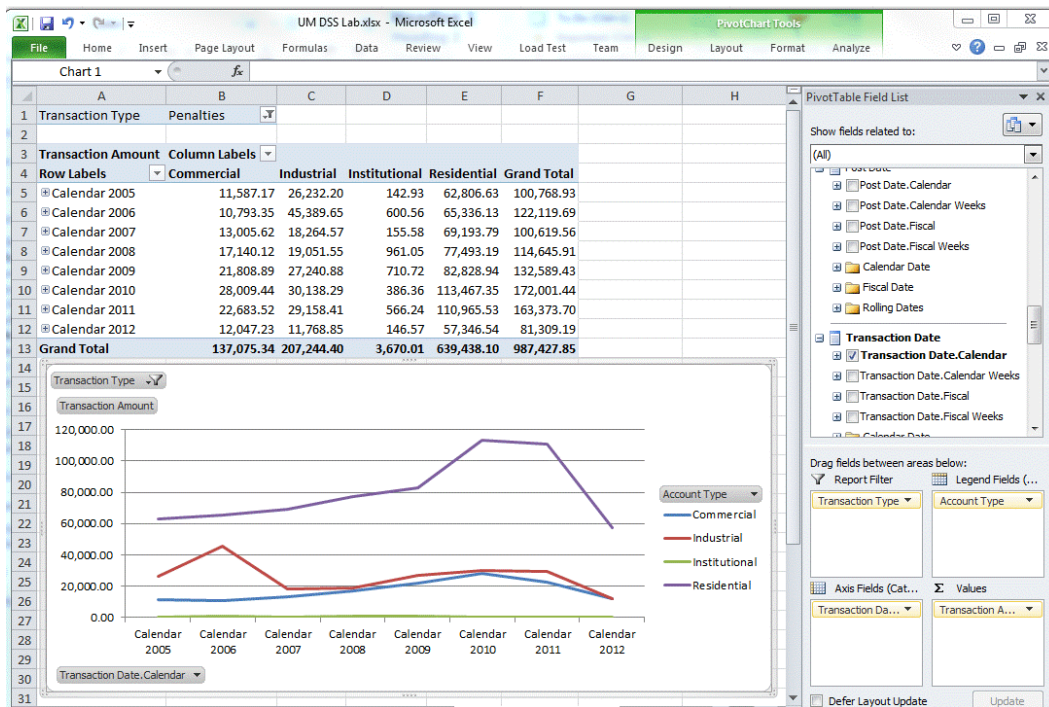Select **PIvotChart** from the top menu and choose line.

Then, to visually represent trends in the information, we can add a pivot graph to visualize the data. Click on **PivotTable Tools** on the menu bar in Excel, and click on **Line Chart with Markers**.
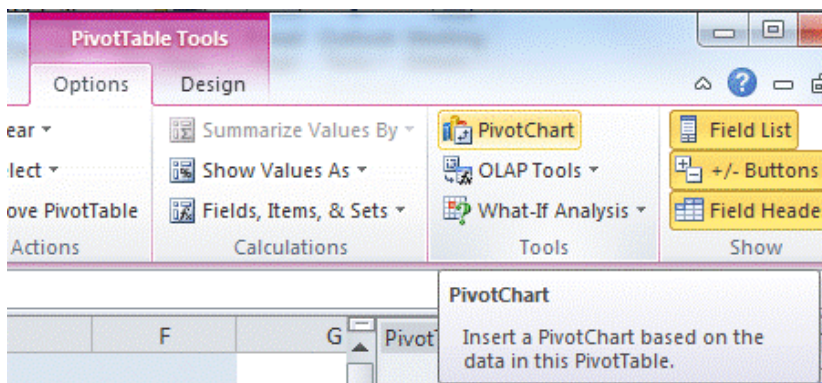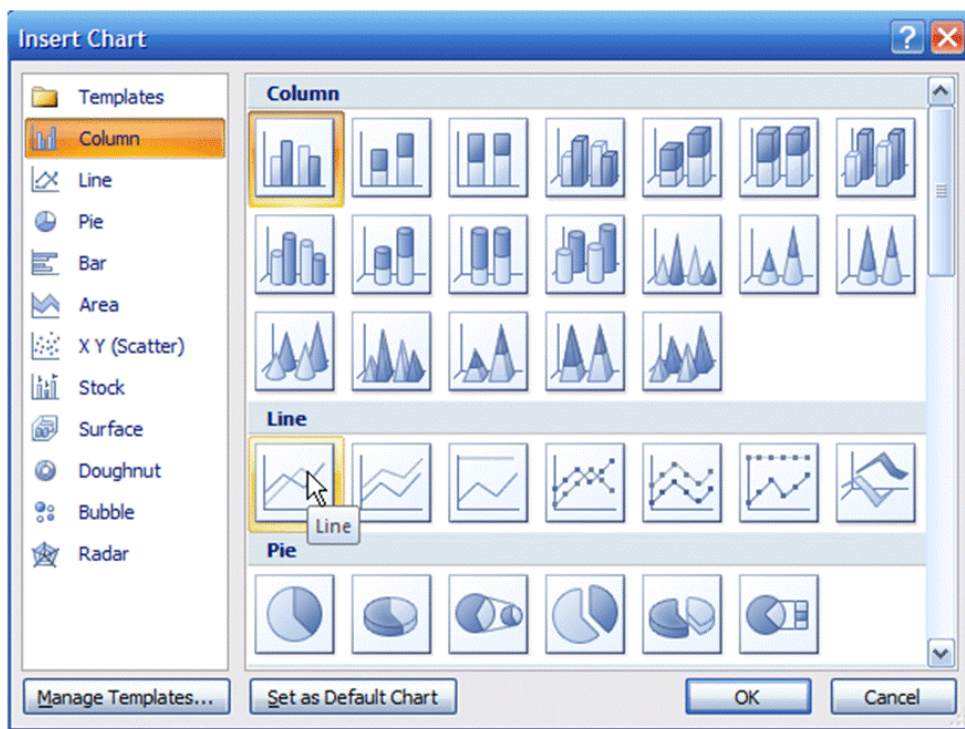
We now have a yearly trend of service orders by activity.

Right-click on any of the calendar years and select **Expand/Collapse > Expand Entire Field** to trend by **Quarter**.

We can now see some trends that were not visible when viewing the information by year. Any of these lines can be isolated for further analysis by further manipulating our pivot table filters.

It is currently a little unreadable. At this level we may only want to look at three years. Click on the **Transaction Date.Calendar** drop-down on the pivot chart and filter to only the last three years.
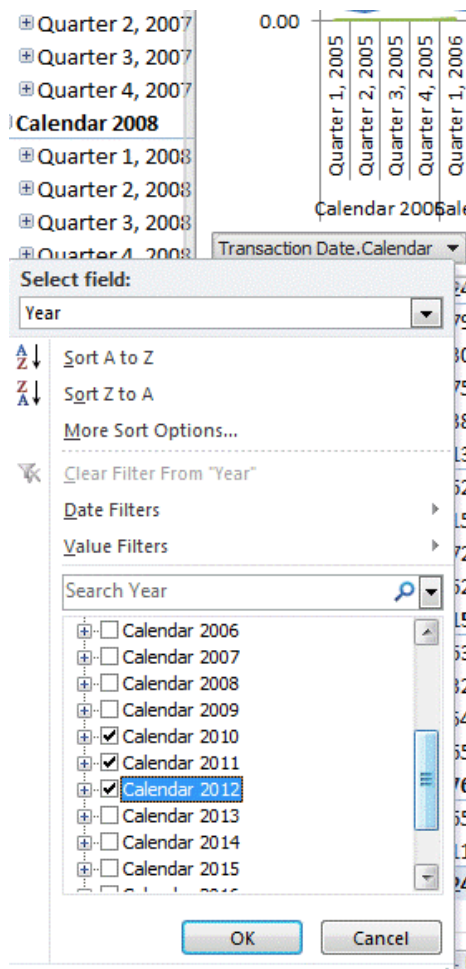
We now have a much more readable chart broken down by quarters.