

Pivot Tables in Excel 2010

Updated 5/19/2016

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Background Information

Pivot tables are a way of summarizing tabular data by use of subtotals and other calculations where the user can choose the display parameters. In this way, large tables of data can be organized so that it can be easily reviewed and relationships identified that might otherwise be hard to see.



Setup a Pivot Table in Excel 2010

Return to TOC

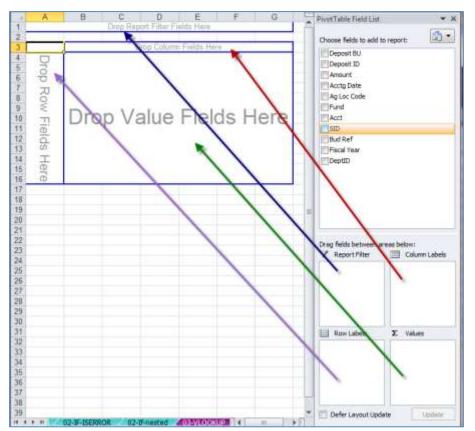
Navigation: Insert (ribbon) > Pivot Table

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2	Deposit Bl	Deposit ID	Amount	Acctg Date
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4	OSCM1	5851	(8,101.81)	9/10/2
5	OSCM1	6022	(5,470.73)	11/20/2
6	OSCM1	6022	(5,413.17)	11/20/2

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22 OSC				
23 050	SULL I	12 886 060	AC2002009111501	11

If you have placed your cursor in the data then Excel will define where the rest of the data is located. Accept the defaults and click OK.





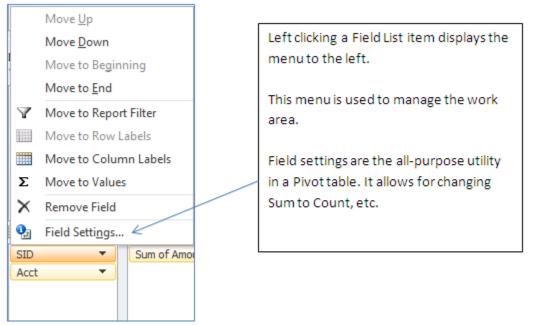
The four boxes at the bottom of the Field List are related to the pivot table, and that relation is shown in the picture above. When you check the boxes in the "choose" area, Excel will take a best guess as to where they belong. Don't be afraid to override Excel's decision. This is, after all, your data.

The relationship between the Field List and the work area.



General Field List Features

Return to TOC



Left click on the label and select Field Settings. A dialog window will open showing you the options that are available.

Value Field Settings	▼ DeptID
Source Name: Amount	
Custom Name: Sum of Amount	Drag fields between areas below:
Summarize Values By Show Values As	Report Filter Column Labels
Summarize value field by	DeptID
Choose the type of calculation that you want to use to summarize	
data from the selected field	
Sum Count	
Average	Row Labels ∑ Values
Min Product	
Number Format OK Cancel	Defer Layout Update Update
sion 🔏 03-Date Table 🦼 04-large-small 🖉 🖬 🖌 💷 🕨 🕨	



/otTable	Field List	• ×
Choose fiel	lds to add to report:	, •
Deposit	t BU	
Deposit	t ID	
🗸 Amou	nt	
Acctg D		
Ag Loc	Code	
Fund		
✓ Acct ✓ SID		
Bud Re	f	
Fiscal Y		
V DeptI		-
2	Add to Report Filter	
	Add to Row Labels	
	Add to Column Labels	
Σ	Σ Add to Values	

Right Click the Field List label allows you to add a particular field any one of the four boxes

DeptID	(All)	·			
Sum of Amount	SID 🔹	r			
Acct 💌	10010	10020	12011	12012	Grand Total
50110	(25,735.18)			(25,735.18)
50170	(11,251.60)			(11,251.60)
50420				(7,149.61)	(7,149.61)
50425				(306,595.80)	(306,595.80)
50441			(9,292.63)		(9,292.63)
50442			(3,516.84)		(3,516.84)
51674		(3,768.48)			(3,768.48)
51764		(31,418.24)			(31,418.24)
52511		(333.94)			(333.94)
52531		(16,608.78)			(16,608.78)
53401		Sum of Ame	ount		(266.66)
53720		Value: (16,60	08.78)		(213.55)
53740		Row: 52531			(2,674.47)
53870		Column: 100	20		(110.64)
53900		(1,007.04)			(1,007.04)
54060		(16,555.10)			(16,555.10)
Grand Total	(36,986.78) (72,956.90)	(12,809.47)	(313,745.41)	(436,498.56)

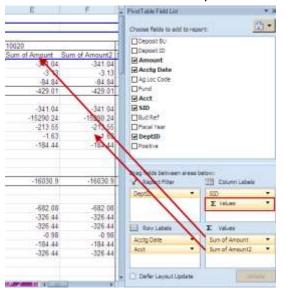
Mousing over a number, Excel gives a summary showing the value amount, Row value, and Column value.



Summing and Counting Together

Return to TOC

An Amount field can be added to the Values area more than once. This is important if you need a precise count of the number of items that make up the amount. To select the amount, just check the box. To select the amount a second time you have to drag and drop.



Note that you now have a Sum of Amount and a Sum of Amount2. You also have a Values icon appearing in the Column Labels.

Drag and Drop the Values icon to the Row Labels.

Click the Dropdown for Sum of Amount2.

Select Value Field Settings.

Select Count. Click OK

C	0	E	F	G	1	PivotTable Field List	
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	SD +					Choose fields to add to report	0 190
Data	10010	10020	12011	12012	Gr	Deposit BU	
Sum of Amount	10010	-341.84	12971	12012	Gr	Deposit ID	
		-341.04				Amount	
Count of Amount2		3.13			- 1	Acctg Date	
Sum of Amount		-3.13			- 1	Ag Loc Code	
Count of Amount2				-	-	Dfund	
Sum of Amount		-84 84	Sum and			Acct	
Count of Amount2	-	2	are displ	ayed.	-		
		-429.01		-	-	€ SID	
	· · · · · · · · · · ·	4				Bud Raf	
Sum of Amount	-2589.14					Piscal Year	
Count of Amount2	2				-	☑ DeptID	
Sum of Amount		-341.04				Positive	
Count of Amount2	1	1	· · · · · · · · · · · · · · · · · · ·			Contraction of the second	
Sum of Amount		-15290.24					
Count of Amount2		3				Drag fields between areas be	ow:
Sum of Amount		-213 55				V Report Filter	Colum Labels
Count of Amount2		1			1.5	DeptD •	StD
Sum of Amount		-1.63				, vesus	510
Count of Amount2		3					
Sum of Amount		-184.44	-				
Count of Amount2		3	-		-	Row Labels	Σ Values
Sum of Amount			-6019.12	_			
Count of Amount2			2		1	Austo Date	Sum of Amount
Sum of Amount			-1696 84			Acct	Count of Amount2
Count of Amount2			2			∑ Values •	
Sum of Amount				-1728.4	5		-
Count of Amount?	Foreited					Defer Layout Update	-port



Grouping Date Data

Return to TOC

1	Ă	B	С	D	E	F	=
1	DeptID	(All) ~					
2		10 -	-				
3	Sum of Amount	SID 🔻					
4		10010	10020	12011	12012	Grand	Total
5	7/22 Arial	- 10 - A	A \$ - %	, 22			(3.13)
6	7/30 B	r = / A		09 🥑		- â	(84.84)
7	7/31		.00	.0 🗸		(3	341.04)
8	8/1/2009		(99.60)				(99.60)
9	8/3	Copy			(1,728.45)	(1.7	728.45)
10	8/6 🔗	Format Cells	0.82)				(0.82)
11	8/6		0.80)			-	(0.80)
12	8/12 🗐	Refresh	3.55)			(2	213.55)
13	8/14	Sort	•	(2,145.86)		(2.	
14	8/15	Filter	9.41)			(12,	Right Clicking a data element
15	8/19	1.0761	3.80)			(in Rows or Columns displays
16	8/20 √	Subtotal 'Acctg	Date 8.08)			(5.	
17	8/28	Expand/Collapse		(5,470.10)		(5,	this menu. I use it primarily fo
18	8/25	Expand/Collapse	4.04)				the Group function.
19	9/1 🌩	Group	9.60)				the eroup function.
20	9/4 👍	Ungroup				(4. (5.	
21	9/9	112115-10			(1,152.30)	(5,	This menu also gives you
22	9/10	Move	•			(8,	a new market and a second of the second of the second second second second second second second second second s
23	9/11 ×	Remoye "Acctg D	Date"	4,139.56		3,	access to Field Settings
24	9/12	Elula Cattle	1.04)			. (
25	9/15 💁	Field Settings	0.88)				
26	9/17	PivotTable Optio	Contraction of the second seco			(
27	9/25	Hide Field List	4.85)			(
28	9/20-20-	1	(1.04)				
29	10/1/2009		(7,989.09)			(7,	
30	10/3/2009		(7,076.20)		and the second second	(7,	
31	10/6/2009		(341.04)		(1.219.06)	(1.	
32	10/7/2009		(133.33)				133.33)

Right click Acctg Date, and select Group > Months

1	DeptID	(All)	+
2		1.1.1.1	
2	Sum of Amount	SID	*
4 5 6		10010	10020
5	7/22/2009		.(
	7/30/2009		(8
7	7/31/2009		(34
8	8/1/2009		(9
9	8/3/2009		
10	Bicinon Grouping	-	? ×
11	WAU19	_	إعبي
12	Auto		
13	R Starting at:	7/22/2009	
14	F Ending at:	1/1/2010	}
15	i golannan -	11112010	
16	By		
11	Seconds		100
19	Mnutes		t
20	Hours Days		
21	Months		
22	Quarters		
23	Years		-
24	100	they of day	
25	00	and a dei	
26		1	1120000001
27		ж.	Cancel
28	9/26/2009		(34

The Gr	ouping Dialog box
allows	you to select the
levelo	f grouping you
want.	



	A	В	С	D	E	F	G	PivotTable Field List
1		AID 🚽	U U	U	L	1		Pivot i able Field List
2	Deptid (/	<u> </u>						Choose fields to add to report:
3	Sum of Amount		SID 👻					
4		.cct ≁		10020	12011	12012	Grand T	Deposit BU
5		1674	10010	(341.04)	12011	12012	(34	Deposit ID
6		3870		(3.13)			(3.	✓ Amount
7	-	3900		(84.84)			0	✓ Acctg Date
8	Jul Total	3300		(429.01)			(4)	Ag Loc Code
9		0170	(2.589.14)	(423.01)			(2,5)	□ Fund
10		0420	(2,505.14)			(1.728.45)	(1.7)	Acct
11		0420			(6,019.12)	(1,720.45)	(6.0	▼ SID
12		0441 0442			(1.596.84)		(0,0	Bud Ref
13		1674		(341.04)	(1,550.04)		(1,3	SID-Acct
14		176		(15.290.24)			(15.2	
14		3720		(15,230.24) (213.55)			(13,2)	
16		3870		(213.55)			(2	▼ DeptID
17	-	3900		(1.03)			(1)	
	Aug Total	3300	(2,589.14)	(16.039.90)	Sum of Amo	unt 1,728,45)	(27,9)	
19		0110	(8,901.81)	(0.030 30)	Value: No va	1,120.431	(8.9)	Drag fields between areas below:
20		0170	(8,662,46)		Row: Aug - 5	3900	(8,6)	🝸 Report Filter 🗰 Column Labels
21	-	0420	(0,002.40)		Column: 120	11 . 152.30)	(1,1)	DeptID 🔻 SID 👻
22	-	0420			3.099.21	(1,152.50)	3.0	
22	-	0441			461.46		3,0.	
23	-	1674		(682.08)	401.40	\sim	(6)	
25	-	1764		(326.44)			(3)	
26	-	2531		(326.44)				Row Labels Σ Values
20	-	3870		(0.98)				
28	-	3900		(184.44)			(1)	Acctg Date Sum of Amount
20	-	4060		(326.44)			(3)	Acct
30	Sep Total	4000	(17.564.27)	(1.846.82)	3.551.67	(1,152,30)	(17.0	
31		0420	(17,304.27)	(1,040.02)	5,551.07	(1,152.30)	(17,0	
32		1674		(682.08)		(1,213.00)	(1,2	
22	6						(4.0	Defer Layout Update Update
14 4	N X 03-Date to P	eriod Co	nversion 📈 03-	(4, 04, 4, 2) Date Table (10)	-large-small 🔪 👔	< □) (

You can change the sort (display) order of appearance by left-clicking the label and selecting a command from the menu, or be left-clicking and dragging to the new position.



Grouping Non-Date Data

Return to TOC

Sum of Sum To	otal A	\mt				
Acct			Total			
	- 50	0000	(1,0	00,00	0.00)	
	- 50)710		33,26	5.50	
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			10		A \$	
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	e- 0-	<u>F</u> orm	at Ce	ls		
	ð	<u>R</u> efre	sh			
	Sort					
		Fil <u>t</u> er			•	
	\checkmark	Su <u>b</u> to	otal "A	lcct"		
		<u>E</u> xpar	nd/Co	llapse	•	
	Ū.	<u>G</u> rou	p			
	Z E	<u>U</u> ngr	oup			
		Move	2		•	
	×	Remo	o <u>v</u> e "A	cct"		
	0	Field	Setti <u>n</u>	gs		
		Pivot	Table	<u>O</u> ptio	ns	
		Hide	Fiel <u>d</u>	List		
	51	740		1,99	3.56	

Grouping numeric data is similar to grouping date Data. Select a field, right click, select Group. The Grouping dialog displays.

5	1115	18,595.0		
5	1132	(28,970.0		
5	3,960.0			
5	1220	12,102.1		
5	1230	3,379.1		
Grouping		8 3		
Auto				
Auto Starting at: Image: Ending at:	50000 55730			



The dialog supplies you with the range and suggested intervals. Both the range and the interval can be changed. You would change the range for two reasons: you want to exclude certain data from grouping, or you are planning to add additional numeric data at a later point.

Drop Report Filter	Fields Here	Drop Report Filter Fields Here			
Sum of Sum Total Amt		Sum of Sum Total Amt			
Acct	Total	Acct 💌	Total		
50000-50999	(896,577.04)	50000-50999	(896,577.04)		
51000-51999	913,377.90	Payroll	913,377.90		
52000-52999	474,164.68	52000-52999	474,164.68		
53000-53999	11,470,687.81	53000-53999	11,470,687.81		
54000-54999	486,081.88	54000-54999	486,081.88		
55000-55999	10,922.46	55000-55999	10,922.46		
Grand Total	12,458,657.69	Grand Total	12,458,657.69		

The names given by Excel are the default names and can be changed.

Non-numeric data can be grouped manually. Select the range you want to group; Right click; select Group. The default name will be Group1, but that can be changed. The second grouping will be Group2.

Pivo	otTable Name:	Acti	ive Field:		→ Group Se	election
Piv	otTable4	Dep	otID		2 Ungroup	,
	Options 👻	6	E: 116	Drill –⊒ Up v	7 Group Fi	eld
	PivotTable		Active Field	- F	Grou	р
			. 🔍 / £			
A	1	·	$\times \checkmark f_x$	SDE640	60	
1	Α		В	С	D	E
1						
2						
3		<u>–</u> Si	um of Sum Total Amt			
4	SDE64060		3,315.03			
5	SDE64070		2,504.65			
6	SDE64105		7,362.31			
7	SDE64110		8,547.76			
8	SDE64115		53.79			
9	SDE64120	Cali	ibri - 11 - A A	\$ - % ;	, <u>E</u>	
10	SDE64125	в	I = 🖉 - A -		<u></u>	
11	SDE64130			.000	· .	
12	SDE64151	Ēp	512.362.66	<u> </u>		
13	SDE64155		<u>C</u> opy			
14	SDE64165	*- 0-	Format Cells	_		
15	SDE64170 SDE64201	G	<u>R</u> efresh			
16 17	SDE64201 SDE64210		Sort >			
17	SDE64210 SDE64220		Filter •			
10	SDE64220			-		
20	SDE64250	<pre> </pre>	Su <u>b</u> total "DeptID"	_		
20	SDE64260		Expand/Collapse			
22		Ū.	<u>G</u> roup			
23	SDE64280	2	Ungroup			
24	SDE64290		Move •			
			INIOVE P			



Ad Hoc Grouping

<u>Re</u>	Return to TOC								
1	A	В	С	D	E	F	G		
1	DeptID	(All) 🔻							
2									
3	Sum of Amo	unt	SID 💌						
4	Acctg Date	▼ Acct ▼	10010	10020	12011	12012	Grand Total		
5	⊜Jul	51674		-341.04			-341.04		
6		53870		-3.13			-3.13		
7		53900		-84.84			-84.84		
8	Jul Total			-429.01			-429.01		
9	⊜Aug	50170	-2589.14				-2589.14		
10	Ŭ	50420				-1728.45	-1728.45		
11		50441			-6019.12		-6019.12		
12		50442			-1596.84		-1596.84		
13		51674		-341.04			-341.04		
14		51764		-15290.24			-15290.24		
15		53720		-213.55			-213.55		
16		53870		-1.63			-1.63		
17		53900		-184.44			-184.44		
18	Aug Total		-2589.14	-16030.9	-7615.96	-1728.45	-27964.45		
19	■Sep	50110	-8901.81				-8901.81		
20		50170	-8662.46				-8662.46		
21		50420				-1152.3	-1152.3		
22		50441			3090.21		3090.21		
23		50442			461.46		461.46		
24		51674		-682.08			-682.08		
25		51764		-326.44			-326.44		
26	Г	52531		-326.44			-326.44		
27		53870		-0.98			-0.98		
28		53900		-184.44			-184.44		
29		54060		-326.44			-326.44		
30	Sep Total		-17564.27	-1846.82	3551.67	-1152.3	-17011.72		
31	⊟Oct	50420				-1219.06	-1219.06		
32		51674		-682.08			-682.08		
33		51764		-4944.12			-4944.12		
34		52531		-4944.12			-4944.12		
35		53401		-266.66			-266.66		
36		53740		-2674.47			-2674.47		
37		53870		-2.18			-2.18		
38		53900		-184.44			-184.44		
39		54060		-5157.67			-5157.67		
40	Oct Total			-18855.74		-1219.06	-20074.8		

If you have similar items, you can mouse over an item until your cursor changes to a right-pointing arrow, and then click. All items that match will be highlighted. To remove the highlighting, just click the mouse somewhere else.



Calculated Fields

Return to TOC

Calculated Fields are special fields that are created in the pivot and not in the source data. They can only be created using numerical information (no text fields are permitted). Otherwise, you are only limited by your imagination.

Navigation: PivotTable Tools (ribbon) > Options > Fields, Items, & Sets > Calculated Field

and the second	PivotTa Options	ble Tools C	Copy of F	RP301_advanced_exer	cises.xls [Compatibi	lity
ata	Clear	Select Move PivotTabl		Summarize Values By * Show Values As * Fields, Items, & Sets *	PivotChart OLAP Tools	W
		Actions		Calculated Field		
				Calculated Item		
G		Н	ii.	<u>S</u> olve Order <u>L</u> ist Formulas	-	
				Create Set Based on <u>F</u> Create Set Based on <u>G</u> <u>M</u> anage Sets		

Insert Calculated Field			<u>? x</u>
Name: Field1		•	Add
For <u>m</u> ula: = 0			Delete
Ejelds: Deposit BU Deposit ID Amount Acctg Date Ag Loc Code Fund Acct SID	▲ ▼ Insert Figld		
		ОК	Close

Name: You can leave the default, but that may not be very descriptive.

Formula: Formulae start with an equal (=) sign and can be any valid Excel formula. In the class example the formula is =Amount*-1 (this reverses the sign of the number)

Fields: Fields can be selected by double-clicking or by selecting and clicking the Insert Field button. When finished, click OK to insert the calculated field and return to the pivot table.

The pivot table now contains both values. You can remove one of the field using the Field List on the right side of the spreadsheet.



Filtering Data

Return to TOC

Each Pivot menu item has a drop down menu that allows you to show data selectively. To see less than the whole just uncheck those values you don't want to see. Menu options that are available will be displayed.

3	Sum of Field1, SID	
4	Acct 10010 10020	
₽ţ	Sort A to Z	
Z A↓	S <u>o</u> rt Z to A	
	More Sort Options	
\mathbb{K}	Clear Filter From "Acct"	
	Label Filters	
	Value Filters	·
	Search 🔎	
	 ✓ (Select All) ✓ 50110 ✓ 50170 ✓ 50420 ✓ 50425 ✓ 50441 ✓ 50442 ✓ 51674 ✓ 51764 ✓ 52511 ✓ Cancel 	

Clicking the dropdown arrow displays a selection menu.

The Report Filter dropdown allows for multi-selections. In Excel 97-2003 it only allowed for one selection.

1	DeptID (AII)	*
Sei	arch	۹.
	(AII) OSC 15250 OSC 15300 OSC 15400 OSC 15910	
	Select Multiple Items	
	ОК	Cancel
	. <u></u>	



Data Slicer

The Data Slicer is related to data filtering. Slicers are easy-to-use filtering components that contain a set of buttons that enable you to quickly filter the data in a PivotTable report, without the need to open drop-down lists to find the items that you want to filter.

F	ile Hor	ne Insert I	Page Layout	Formulas	Data	Review	Vie	W E	Develop	er Add-Ins PDF	Options
Pivo	tTable Name:	Active Field:	@∃ Evnand	Entire Field	🕸 Group	o Selection	A1	A Z Z A			13 13
Pive	otTable1	Vendor Name 1			🖗 Ungro	oup					
1	Options -	👰 Field Setting	s Collaps	e Entire Field	17 Group	o Field	Z I	Sort	Inser		Clear Sele
N	PivotTable	A	Active Field		Gr	oup	5	ort & Fi		Insert Slicer	Acti
	A4	+ (6	<i>f</i> ∗ R	ow Labels						Elicer Connections	
1		A			В		С	D	-	Insert Slicer	
1	Fund			(All)		•				Insert a slicer to filter da	ata
2										interactively.	
3	And in case of the local division of the loc	ucher Amount		Colu	ımn Labe	and the second se	43475	2055	•	Slicers make it faster an	
4	Row Labe 25 VAN ZA	IS NT STREET CON		-		10020	12175	2055	9	filter PivotTables and cu functions.	De

Selecting "Insert Slicer" opens the dialog.

Insert Slicers	? ×	
Unit PO PO Date Vendor Name 1 Line Dist Line PO Amount Voucher Amount Voucher Voucher Voucher SID Due Date Acctg Date		
ОК	Cancel)

A slicer will be created for each box you check. Also, slicers are independent of any fields you may have selected for your pivot.



Fund		K	
12001			
12062	Account		- K
13033	51190		
21009	51200		E
21022	51230		
	51580		
	51620		
	51780		
-	51970		
	51982		-
00		9999	

Once you click OK, your slicers will be ready for use. See the charting section for other uses of the Slicer.

Drill Down

Return to TOC

While the purpose of a pivot is to allow you to summarize data on the fly, pivot table functionality also allows you drilldown on the data and its totals to see the detail that makes up the summary.

	A		В	С		D	E	F	G
1	DeptID		(All) 🗅	r					
2									
3	Sum of Amoun	it		SID	•				
4	Acctg Date	• /	Acct	10010		10020	12011	12012	Grand Total
5	⊜Jul		5167	4		-341.04			-341.04
6			5387	D		-3.13			-3.13
7			5390	D		-84.84			-84.84
8	Jul Total					-429.01			-429.01
9	⊟Aug		5017	0 -2589.	.14				-2589.14
10			5167	4		-341.04			-341.04
11			5176	4		-15290.24			-15290.24
12			5372	D		-213.55			-213.55
13			5387	D		-1.63			-1.63
14			5390	D		-184.44			-184.44
15			5044	1			-6019.12		-6019.12
16			5044	2			-1596.84		-1596.84
17			5042	0				-1728.45	-1728.45
18	Aug Total			-2589	.14	-16030.9	-7615.96	-1728.45	-27964.45

Select the cell you want to drill into and double-click. A new tab will open displaying the detail that makes up the summary.



1	А	В	С	D	E	F	G	Н		J	K
1	Deposit BU	Deposit ID	Amount	Acctg Date	Ag Loc Code	Fund	Acct	SID	Bud Ref	Fiscal Year	DeptID
2	OSCM1	5786	-12308.37	8/15/2009	TRBM1	11000	51764	10020	2010	2010	OSC15300
3	OSCM1	5797	-333.79	8/19/2009			51764			2010	OSC15300
4	OSCM1	5801	-2648.08	8/20/2009	OSCM1	11000	51764	10020	2010	2010	OSC15300

If you don't want to keep the new tab, it may be deleted by right-clicking the tab and selecting Delete.

	Insert
K	<u>D</u> elete
	<u>R</u> ename
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Refreshing the Pivot Table

Return to TOC

As you add fields to the Row or Column it is possible to clutter the pivot table so that it can be almost unreadable. The better solution is to determine which fields should appear together then create a "helper" column in the source data and import it into the pivot. You can also create helper columns for calculations if you don't want to use the Calculated Field option.

The first thing you need to remember is that Excel has already determined the perimeter of the data, so when you add the helper column, place it inside the existing table. Excel will expand the table definition to include the new column. If you place the new column to the right of the data then you will have to manually redefine the table perimeter.

Second, when a new column is added, it picks up the attributes of the column to the left, which may not be a bad thing. However, if you wish to add a formula then you should make sure that the column is formatted "General." Once you have inserted the new column, click Ctl-1 (Control | the number one). This will open the Format Cells dialog. Select General and click OK. The column is now ready for formula entry.

Third, the pivot table requires that there be a column header description. Otherwise, it will not be able to update.



Once you have taken care of the three points above, you can enter your formula. In the example the formula used is =CONCATENATE(I3," - ",H3) and it joins the SID and Acct fields with a column header labeled SID-Acct. Copy the formula down to the bottom of the data.

Н	l.	J	К	L	М
CT_CORE_FIN_G	L_REFUND_OF_	EXP	=CONCATENAT	E(I3," - ",H3)	
Acct	SID	Bud Ref	SID-Acct	Fiscal Year	DeptID
50110	10010	2010	10010 - 50110	2010	OSC15400
50110	10010	2010	10010 - 50110	2010	OSC15400
50110	10010	2010	10010 - 50110	2010	OSC15400

Once you have inserted the helper column, return to the pivot table and navigate to PivotTable Tools > Options > Refresh. Click the Refresh button and Excel will add the newly created field. This field is now available for general use in your pivot table.

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<u>′4</u>		-341.04				1.04]Deposit ID			
74 70		-3.13				-3.13		Amount	_		
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74	-2589.14	-341.04				13 14 1.0		Acct			
4		-15290.24			-1529			SID			
70 74 20 70 20		-213.55				3.55		Bud Ref			
70		-1.63				-1.63		SID-Acct			
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20	-2589.14	-16030.9	-7615.96	-1728.45 -1728.45		28.45					

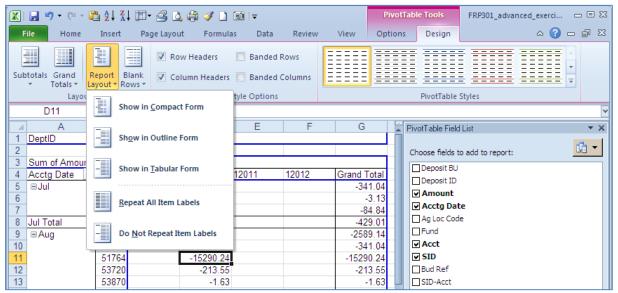


Formatting the Pivot Table

Return to TOC

Presentation of data is as important as accuracy of the data. If you are going to deliver the pivot table to a supervisor, it is important to make sure that the presentation is formatted so that your supervisor will have no worries about sending it further up the chain of command.

Excel 2010 offers two ways to format your pivot table. The first way involves adjusting the layout to what you want it to be. The second involves applying a color template in order to give that finished look to your work.



Navigation: PivotTable Tools > Design > Report Layout

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2		53720		-213.55			00000	00000	00000	00000	00000		00000	
6		53870		-1.63				22228	88888	22222	82225			
13	1	53900	1	-184.44							20000			
15		50441			-6019.12		82228		88888	81222	80000	B =355		
16		50442			-1596.84		Dark							
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19	BSep	50110	-8901.81											

Navigation: PivotTable Tools > Design > PivotTable Styles



Show Pages

Return to TOC

We have already seen one of the functions of Show Pages: the ability to present either a single part or selected multiple parts of your pivot. There is a second part to Show Pages; and that is to create separate pages showing a single aspect of the data. This is ideal if you have to distribute a unit's data to each unit or group and the original data is contained in a single data sheet.

Navigation: PivotTable Tools > Options > PivotTable Name > Options > Show Report Filter Pages

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File Ho	me	Insert	Page L	ayou	t Formula	is Data	Review	View Opt	ions Desi	ign
PivotTable Name PivotTable1 Options Options	Sur	ve Field: n of Amo Field Set	==	4	Group Select Ungroup Group Field Group	Z↓ Z↓ S	iort Insert Slicer =	Refresh Chan * Son Data		ear
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3 Sum of A 4 Acctg Dat		Acct -	SID 10010	-	10020	12011	12012	Grand Total	1	
5 🖃 Jul	100	51674	-		-341.04		1	-341.04		
6		53870			-3.13			-3.13		
7		53900			-84.84			-84.84		
8 Jul Total					-429.01			-429.01		
9 🗄 Aug		50170	-2589	.14				-2589.14		
4.0		54071			214.04			214.04		

The Show Report Filter Pages dialog displays. If you have more than one Report Filter item, they will all display. Select the Filter you want to use. Click OK.

	Show Report Filter Pages
	Show all report filter pages of:
1	DeptID
	
	OK Cancel

After you click OK, Excel will create a new tab for each item listed in the Filter.



	A	В	С	D	E
1	DeptID	OSC15910 🕂			
2					
3	Sum of Ar		SID 💌		
4	Acctg [🔻	Acct 💌	12011	12012	Grand Total
5	⊟Aug	50441	-6019.12		-6019.12
6		50442	-1596.84		-1596.84
7		50420		-1728.45	-1728.45
8	Aug Total		-7615.96	-1728.45	-9344.41
9	🗆 Sep	50441	3090.21		3090.21
10		50442	461.46		461.46
11		50420		-1152.3	-1152.3
12	Sep Total		3551.67	-1152.3	2399.37
13	⊡Oct	50420		-1219.06	-1219.06
14	Oct Total			-1219.06	-1219.06
15	⊟Nov	50441	-625.76		-625.76
16		50442	-194.24		-194.24
17		50420		-1524.9	-1524.9
18		50425		-138809.3	-138809.3
19	Nov Total		-820	-140334.2	-141154.2
20	⊡Dec	50441	-5737.96		-5737.96
21		50442	-2187.22		-2187.22
22		50420		-1524.9	-1524.9
23		50425		-167786.5	-167786.5
24	Dec Total		-7925.18		-177236.58
25	Grand Tot	tal	-12809.47	-313745.41	-326554.88
26					
<u>97</u>	🕨 🖬 📝 Shee	43 🔏 OSC15250	/ OSC15300 /	OSC15400)	OSC15910 / She
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This information can now be easily distributed to individual recipients.

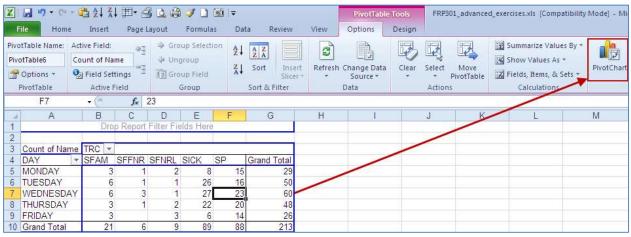


Pivot Charts

Return to TOC

Not all data lends itself to charting but don't be afraid to experiment to see if your data might lend itself to charting.

Navigation: PivotTable Tools > Options > PivotChart



The Insert Chart dialog will display

Templates	Column	
Column		
🖄 Line		
🕒 Pie		
E Bar		
Area		
🔬 X Y (Scatter)	JAA JAA JAA	
Stock		
🐻 Surface	Line	
Doughnut		
88 Bubble		
🖄 Radar	Pie	-
Manage Templates	Set as Default Chart OK	Cancel

Select the style you want and click OK.

The Chart will display on the same worksheet



1.4	A	B	C	D	E	Ŧ	G	н
1								
2		1						
3	Count of Name	TRC #						
4	DAY	SFAM	SEENR	SFNRL	SICK B	SP	Grand Total	
5	MONBAY	3	1	2	8	15	29	
6	TUESDAY	6	1	1	26	16	60	
	WEDNESDAY		-3	. 1	27	23	60	
8	THURSDAY	3	1	2	22	20	48	
9.	FRIDAY	3		3	-6	. 14		
tî.	Grand Total	21	6	9	89	88	213	
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56789	25 20 15					Ì	_	SFAM
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15 16 17 18 19 11 12	25 20 15 10	I.					1	SFAM SFFNR SFNRL SICK
567899122	25 20 15	I.						SFAM
15 16 7 18 19 11 12 23 14	25 20 15 10	1						SFAM SFFNR SFNRL SICK
15 16 7 18 19 11 12 23 24 25	23 20 13 10 5 0	DAY TI	ESDAY 1	WEDNESS		RSDAY	PRIDAY	SFAM SFFNR SFNRL SICK
56789112345	25 20 15 10 5 0	DAY TI	JESDAY Y	WEDNESO		RSDAY	PRIDAY	SFAM SFFNR SFNRL SICK
56789912234	23 20 13 10 5 0	DAY TI	JESDAY	WEDNESO	AY THU	RSDAY	PRIDAY	SFAM SFFNR SFNRL SICK

At this point, you have a standard chart, which can be presented as is or further modified to provide emphasis.

	A	В	С	D	E	F	G	Н
1								
2								
3	Count of Nam	e TRC 💌						
4	DAY	 SFAM 	SFFNR	SFNRL	SICK	SP	Grand Total	
5	MONDAY	3	1	2	8	15	29	
6	TUESDAY	6	1	1	26	16	50	
7	WEDNESDA		3	1	27	23	60	
8	THURSDAY	3	1	2	22	20	48	
9	FRIDAY	3		3	_	14	26	
10	Grand Total	21	6	9	89	88	213	
11	- Fr							
12	Count of N	ame						
13	30							_
14				27	7			
15	25		-20			22		
16	20						U	rrc 🔻
17	15							SFAM
18								SEENR
19	10	1					<u> </u>	
20	5		_			_	<u></u> '	SFNRL
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22	- · · ·	<u>,</u>	4	4	4	1	-1	
23	MONDA	TUESD	AT WED	SOA	THURSDAY	a la	oat	SICK
24	MOL	TUES	0	AL.	HUR	<*	r	
25	`		WEL		~			
20	DAY 🔻							
28	DAY V							

This chart has been modified to show Sick use as a line, and also the number of occurrences per day over the period studied.



Pivot Chart Slicer

Return to TOC

Slicers can be used to control the appearance of multiple pivot charts. The first step is to create the basic Pivot table and format it appropriately. In the class example, we take the Rpt Dt field, Group it to Days starting at 12/10/2010 (Friday) and set the number of days to 14 (Friday through Thursday). Once we have completed the setup, we'll move it the Report Filter Area. The class example, Quantity = Data Values; Day = Row; TRC = Column. Format the Rpt Dt then move it to the Report Filter. Rename the Row Label to Day. Rename the Column Label to TRC.

1/5/2011 - 1/11/201 Cal	ibri - 11 - A A \$	• % • •a•
TUESDAY		
12/15/2010 - 12/21/ B		•.0 .00 ∛
12/22/2010 - 12/28/201		
12/29/2010 - 1/4/20 🛍		
1/5/2011 - 1/11/201 🎬	Format Cells	
SWEDNESDAY	<u>R</u> efresh	24 2
12/15/2010 - 12/21/	<u>S</u> ort →	16
12/22/2010 - 12/28/	 Fil <u>t</u> er ▶	8 2
12/29/2010 - 1/4/20		
1/5/2011 - 1/11/201 🗸	Su <u>b</u> total "Rpt Dt"	
1/12/2011 - 1/15/20	Expand/Collapse 🕨	
THURSDAY	Group	8 10
12/15/2010 - 12/21/	Ungroup	8 10
12/22/2010 - 12/28/	Move ►	
12/29/2010 - 1/4/20	_	
1/5/2011 - 1/11/201 🗙	Remo <u>v</u> e "Rpt Dt"	
1/12/2011 - 1/15/20 🧕	Field Settings	
= FRIDAY	PivotTable Options	12
12/15/2010 - 12/21/	Hide Fiel <u>d</u> List	12
12/15/2010 - 12/	21/2010	
12/22/2010 - 12/		
12/22/2010-12/	20/2010	
Grouping	2	X
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L Starting at	: 12/13/2010	
Ending at:	1/15/2011	
1	10-20-20	
1 <u>B</u> y		22
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1	Number of days: 7	
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	OK Cano	

The next step is to make copies of our pivot table. Highlight the pivot table (A1:G10), copy, and paste it twice on the same worksheet (J1 and A20).



Select the first pivot table (A1) and Create a chart: PivotTable Tools > Options > PivotChart > Column. Give it the Chart Title of Hours: Pivot Chart Tools > Layout > Chart Title > Overlay. Remove all the chart filters: Pivot Chart Tools > Analyze > Field Buttons > Hide All.

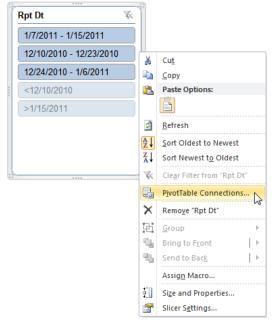
Apt Dt	(All)	+									
Sum of Qs Row La *			SFFNR	SENR		SICK	si		Grand Total		
MONDAY	19	.25		5	7	4	3.5	33.75	111.5		
TUESDAY		20	6 3	в	8	145	25	43.5	225.75		
WEDNESD	14	.75	2	\$	2	153.	75	65.5	260		
THURSDA'		5	6 - 9	8	10	142	75	36.25	202		
FRIDAY		22			12	41	75	42.25	118		
Grand Tot		81	4		39	5	28	221,25	917.25		
				Value	Field	d Settings	ž.			1	
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				Ar Ma Ma					•		
				-	iber i	Formet			ок	Cancel	

Select the Second pivot table (J1), right click, and select Value Field Settings > Count > OK.

Create the chart following the directions above. Name it Occurrences.

Select the third pivot table (A20). Remove TRC, Day, and Sum of Quantity.

Navigate: Pivot Table Tools > Options > Insert Slicer > Rpt Dt > OK. Right click the slicer and select PivotTable Connections > check all the boxes. This will allow the slicer to control both charts.





	Name	Sheet
7	PivotTable 1	Sheet2
1	PivotTable2	Sheet2
1	PivotTable3	Sheet2

Position the charts and the slicer, and select each week to see how the charts change.

If you create more than one slicer, you will have to connect each one separately.