Basic Pivot Tables

Pivot tables summarize data in a quick and easy way. In your job, you could use pivot tables to summarize actual expenses by fund type by object or total amounts.

- Make sure you do not have any blank rows in your spreadsheet. The Pivot Table does not recognize blank rows, and will not include all of your data.
- If you prefer, you can adjust the column widths, so you can see the descriptions.

To begin your pivot table, choose **Data, Pivot Table and Pivot Chart Report.**
The following screen appears, choose **Next**.

Notice the range of data is marked by the moving dotted lines.
The following screen appears.
Choose **Finish**.
You will want to arrange the fields to help analyze the data.

Here is what it should look like:
Click and Drag `FISCAL_YR` to column field, then release.

Here is what it should look like:
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<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sum of TREND_AMT</td>
<td>2004</td>
<td>2005</td>
<td>2006</td>
<td>Grand Total</td>
</tr>
<tr>
<td>2</td>
<td>FISCAL_YR</td>
<td>2004</td>
<td>2005</td>
<td>2006</td>
<td>Grand Total</td>
</tr>
<tr>
<td>3</td>
<td>PNTRYP_DESC</td>
<td>2004</td>
<td>2005</td>
<td>2006</td>
<td>Grand Total</td>
</tr>
<tr>
<td>4</td>
<td>DI-State</td>
<td>2617241.06</td>
<td>307951.31</td>
<td>3968683.2</td>
<td>8964818.59</td>
</tr>
<tr>
<td>5</td>
<td>D2-Overhead</td>
<td>402932.44</td>
<td>593093.95</td>
<td>292893.77</td>
<td>1736218.76</td>
</tr>
<tr>
<td>6</td>
<td>IO-Contracts and Grants</td>
<td>456236.64</td>
<td>652632.85</td>
<td>357648.69</td>
<td>15466501.12</td>
</tr>
<tr>
<td>7</td>
<td>IO-University Trust</td>
<td>1464399.16</td>
<td>1538142.57</td>
<td>1403331.82</td>
<td>4365703.54</td>
</tr>
<tr>
<td>8</td>
<td>IE-Agency</td>
<td>841902.61</td>
<td>772353.85</td>
<td>1134110.07</td>
<td>2543225.07</td>
</tr>
<tr>
<td>9</td>
<td>IE-Auxiliary and Other</td>
<td>-80903.27</td>
<td>-269544.74</td>
<td>-38903.66</td>
<td>-30929.75</td>
</tr>
<tr>
<td>10</td>
<td>Grand Total</td>
<td>568221.51</td>
<td>1729454.17</td>
<td>1226852.86</td>
<td>3811410.33</td>
</tr>
</tbody>
</table>
Another option to try:
- Click **OBJ_LVL3** and drag to right of **FND_TYP_DESC** and release.

Tip:
Position the cursor to when the vertical bar appears, then release.
Other options to try:
- Click **OBJ_LVL1** and drag to right of **FNDTYP_DESC** and release.

- Click **YREND_AMT** and drag back to PivotTable Field List. Then click **REV_BUDGET_AMT** and drag to data items and release. Then click **YREND_AMT** and drag to data items and release. Other $$ fields could be added.

- Click **ACCT_NBR** and drag to right of **FNDTYP_DESC** and release.

You can drag field names into the row, column, or data area to design the layout of your pivot table and back to the field list (to remove it) until you get the desired report.

After you drag and drop a field, you can double-click the field button (or right click on the field button for drop-down menu, then click on Field Settings) to customize how the field data is summarized.

Click on **Sum**.

Sometimes the field may state **Count**.
You can also click on the field to select certain data to be displayed. For example, to show only Expenditures you will need to:

1. Click on OBJ_LVL1 down arrow key.
2. Click beside Revenue to unclick it as shown.
3. Then click OK.

Other examples are to select certain fund type(s), account(s), or object(s). You may need to report only on supplements or temporary personnel object codes.

You can now format your pivot table report.

1. Click of the field name to be formatted, then right click for the menu (or double click).
2. Then click on Field Settings.
Verify how the appropriate field is to be summarized by.

Then click on **Number** to format the cells.

Another window will appear - Format Cells. Click on the box for comma, and/or other formatting options.

Click on **OK** on the Format Cells window and then on the PivotTable Field window to return back to table.
You can also adjust the column widths, page setup and printing options as you would with any excel spreadsheet.

The report now appears like:

Note: If you change the fields in the report after you’ve formatted them, either by replacing them and/or adding/removing them, the formats will return to the original format.
Other formatting options can be to change labels or edit fields. You may edit in the pivot table or copy and paste to another worksheet.

Example – let’s remove object codes numbers and leave object code category.

Just click in the field to change and edit. It will affect the entire report.

Now look at
Other tips:

It is important to point out that if you change any of your detail, you need to click on the **red exclamation point** in the Pivot Table toolbar to refresh your data.

You have to click somewhere in the Pivot Table report to make the pivot table toolbar active.

If you double-click on one of the amounts in the total column, the detail for that amount will appear on a new tab.

You can create more than one Pivot Table using the same data by copying and pasting to another worksheet. It is a good idea to rename your spreadsheet tabs so you know what each spreadsheet tab includes.
Advanced:

**Creating a field**

Let's look at a report. We have REV_BUDGET_AMT for Revised Budget, and YREND_AMT for Total expenditures for the data fields.

Let's add another row for Cash Available.

To do this, click on Pivot Table, go to Formulas, go to Calculated Field and click.
A new window will appear – Insert Calculated Field. Here you can create your own calculations for a new field.

Give it a name, and enter the formula. When using an existing field, click on the field in the list below, and click on Insert Field. After entering the formula, click on OK. If you need to create a field, and use it to create another field click on Add. The field will appear at the bottom of Fields – and then you can create a new field.

Here’s the calculated formula for Cash Available.

Then click OK.
Here's what the report looks like:

### Analysis – percentages

Let's look at a report and get percentages instead of numbers.

The pivot table has been copied. The first table will show actual expenditures, and the second one we will change to percentages. We want to know the percentage of expenditures for each fund type for each fiscal year.
To do this, you can double-click the field button (or right-click on the field button for drop-down menu, then click on Field Settings) then click on **Options >>** to customize how the data will be displayed.

Then click on the down arrow key under Show Data as:

Click on % of column.

Then click on **OK**.
Now let's take a look at the report.

![Excel spreadsheet showing a table and a chart]

You can experiment with the other features and look at the data that is returned.