

Benefits of using pivot tables:

Pivot Tables are worksheet tables that let you summarize and analyze your Excel data. Benefits include:

- Ability to recap using any data element and then drill down to review the details.
- Formulas may restrict sorting capabilities or may be corrupted when adding and deleting rows or columns.
- Ability to get a summary or recap of the data rather than scrolling down to find each subtotal.
- Data does not have to be sorted by a particular element in order to get a subtotal for that data element.

Creating a simple pivot table:

1. Format data into a table. To do this, simply select the data in your table. The headers should be in the first row. Select Format as Table.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	CC	Grad	NAME	GL CODE	CERT	EXP	Days	FTI	SALARY	Longevit	Add Days	upplen	Replaced/Comm
2	4	4	BALDWIN, ALEC	1120-900-1120-100-111-04	AA	6	187	1	41,995		-		
3	8	3	BROWN, BOBBY	1120-900-1120-100-111-08	AA	23	187	1	54,754		-		
4	14	PE	BUNNY, BUGS	1120-900-1120-100-111-14	AA	3	187	1	39,990		-		
5	12	COUN	CRICKET, JIMMY	1120-900-2120-403-111-12	AA	8	192	0.5	21,658		1,158	6,000	
6	14	4	DOE, JANE	1120-900-1120-100-111-14	A	1	187	1	36,540		-		
7	14	3	DOE, JOHN	1120-900-1120-100-111-14	AA	3	187	1	39,990		-		
8	4	NURSE	DUCK, DAFFEY	1145-900-2130-400-111-04	A	7	187	1	39,065		-		
9	4	4	DUCK, DONALD	1120-900-1120-100-111-04	A	10	187	1	41,900	2,000	-	6,000	
10	8	3	HALL, GUY	1120-900-1120-100-111-08	A	1	187	1	36,540		-		
11	8	TSGT	JOHN, JIMMY	1120-900-1210-205-111-08	AA	20	187	1	52,610	2,000	-	6,000	
12	8	TSGT	JOHN, PAPA	1120-900-1210-205-111-08	AA	21	187	1	53,270	2,000	-	6,000	
13	4	1	JONES, JANE	1120-900-1120-100-111-04	AA	7	187	1	42,655	2,000	-		
14	12	COUN	JONES, JIMMY	2217-900-2120-400-111-10	AA	8	192	0.5	21,658		1,158		
15	4	3	MOOSE, BROWN	1120-900-1120-100-111-04	A	5	187	1	38,025		-		
16	4	3	MOUSE, MINNIE	1120-900-1120-100-111-04	A	0	187	1	36,540		-		NEW POS FY 2016
17	12	1	ONO, YOKO	1120-900-1130-100-111-12	A	16	187	1	44,870		-		
18	4	2	POTTER, HARRY	1120-900-2113-400-111-04	A	24	187	1	49,634	2,000	-		REPLACE PACCHER
19								16		10,000			

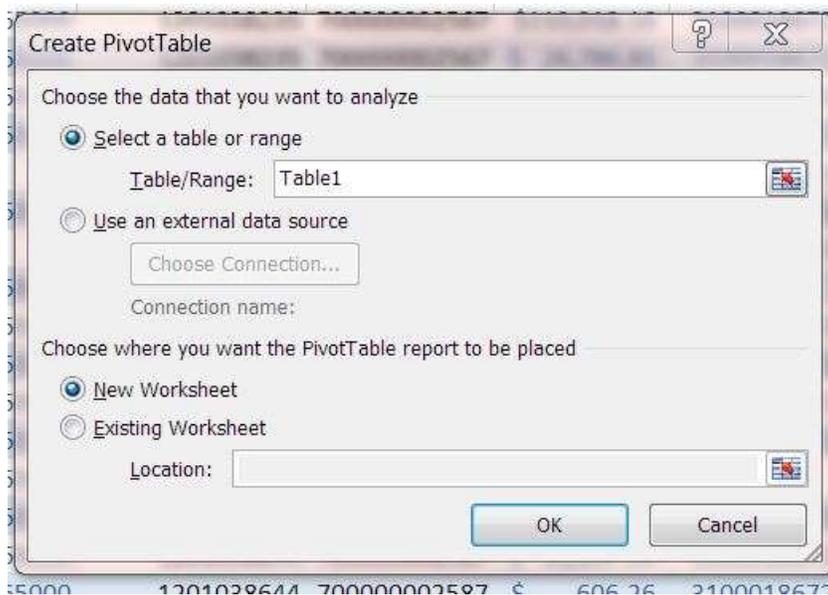
2. The dropdown arrows in the header row will allow you to sort the data and/or filter only the data you want to see.

3. Select Summarize with PivotTable Button under Table Tools (Design)



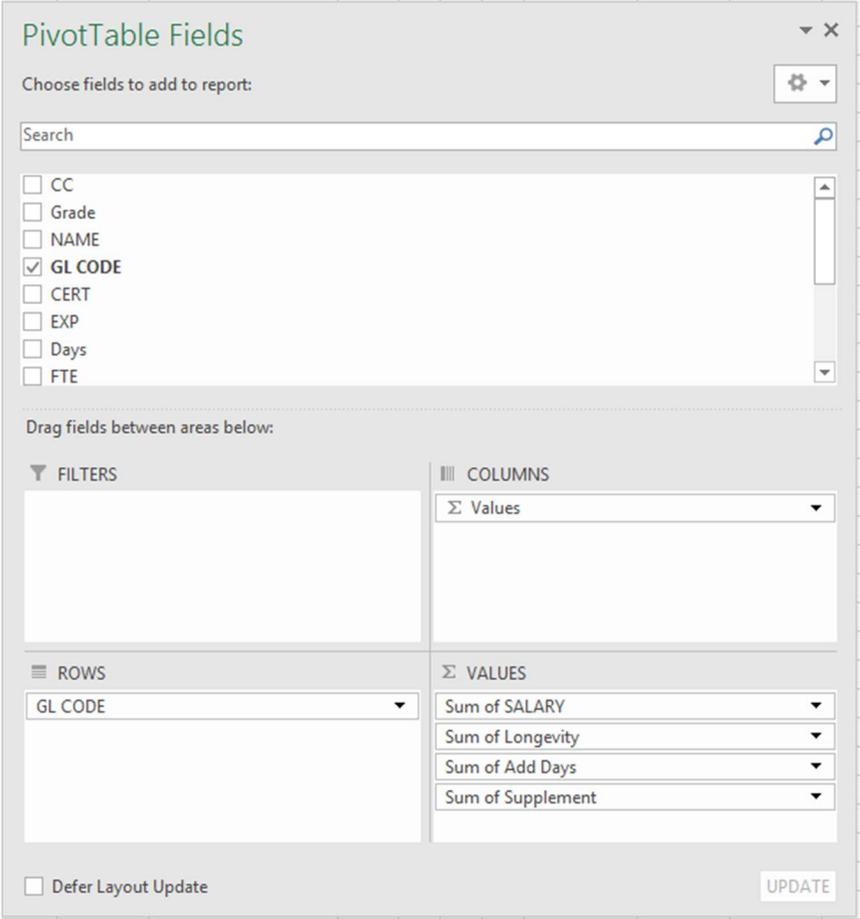
4. The create PivotTable Box should display. Make sure the table you want to summarize is in the table or range box. Choose where the pivot table should display.

Using Power Pivot Tables in Excel to Replace Formulas



5. A dialogue box will appear with your table headers listed as fields. Drag the fields from the Field List to one of the bottom panels to create the PivotTable that captures the data you need.

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- 6. Select the fields you want to summarize. Your table will start to build as you select the fields you want to include.

Using Power Pivot Tables in Excel to Replace Formulas

The screenshot shows an Excel PivotTable with the following data:

Row Labels	Sum of SALARY	Sum of Add	Sum of Supplement
1120-900-1120	201,115	#	6,000
1120-900-1120	91,294	-	
1120-900-1120	116,520	-	
1120-900-1130	44,870	-	
1120-900-1210	105,880	#	12,000
1145-900-2130	39,065	-	
1120-900-2120	21,658	1,158	6,000
2217-900-2120	21,658	1,158	
1120-900-2113	49,634	#	
Grand Total	691,693	#	24,000

The PivotTable Fields task pane shows the following configuration:

- ROWS:** GL CODE
- VALUES:** Sum of SALARY, Sum of Longevity, Sum of Add Days, Sum of Supplement

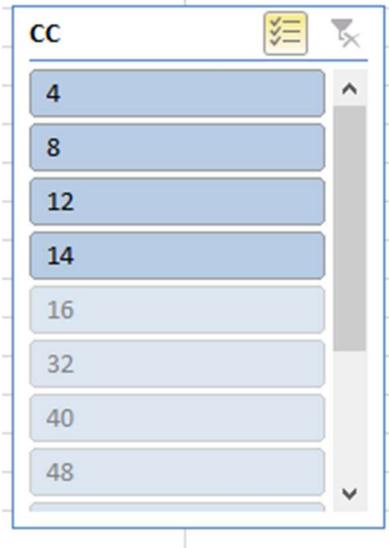
- As changes are made to the original source table, simply click refresh under the Pivot Table Tools and options. This will update your recap.
- You can change the data by changing the fields or create multiple recaps from the same data.
- Once you have the pivot table created, if you need to drill down to see the details, simply double click.
- See the table below. I double clicked on the \$201,115 on Row 4 Column B and the following data appears in a new sheet.

The detailed data table is as follows:

CC	Grade	NAME	GL CODE	CERT	EXP	Days	FTE	SALARY	Longevity	Add Days	Supplement	Replaced/Comment
4	1	JONES, JA	1120-900-11AA		7	187	1	42655	2000	0		
4	4	BALDWIN,	1120-900-11AA		6	187	1	41995				
4	3	MOOSE, B	1120-900-11A		5	187	1	38025				
4	4	DUCK, DO	1120-900-11A		10	187	1	41900	2000	0	6000	
4	3	MOUSE, W	1120-900-11A		0	187	1	36540				NEW POS FY 2016

- You may also want to insert slicers in your recap. This will allow you to only see certain data at once. With your cursor in the table. Select Options under the Pivot Table Tools. Select Insert Slicer. A list of your headers will appear. Select the one you want to use. I selected cost center.

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12. A box with my cost centers will now be visible. If I select any one of the cost centers, only that information will appear in the recap. In this example, I selected CN-Food Rebates. Even though this information is included with other data in my pivot recap as blank, I can still separate it using the slicer.

	A	B	C	D	E	F
1						
2						
3	Row Labels	Sum of SALARY	Sum of Longevity	Sum of Add Days	Sum of Supplement	
4	1120-900-1120-100-111-04	201,115	4,000	-	6,000	
5	1145-900-2130-400-111-04	39,065		-		
6	1120-900-2113-400-111-04	49,634	2,000	-		
7	Grand Total	289,814	6,000	-	6,000	
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13. Multiple pivot tables can be inserted into one worksheet, to create a dashboard or overview of the data in multiple formats. See the picture below. I have a recap of my salary cost by general ledger code and I also have a count of the number of employees for each certification by cost center. I can view the entire list as shown under the AA or just the totals.

Using Power Pivot Tables in Excel to Replace Formulas

The screenshot displays an Excel spreadsheet with a PivotTable and a PivotChart. The PivotTable is located in the range A3:E13 and summarizes data for various employee IDs. The PivotChart is located in the range J3:O17 and shows the count of employees for each ID.

Row Labels	Sum of SALARY	Sum of Longevity	Sum of Add Days	Sum of Supplement
1120-900-1120-100-111-04	201,115	4,000	-	6,000
1120-900-1120-100-111-08	91,294	-	-	-
1120-900-1120-100-111-14	116,520	-	-	-
1120-900-1130-100-111-12	44,870	-	-	-
1120-900-1210-205-111-08	105,880	4,000	-	12,000
1145-900-2130-400-111-04	39,065	-	-	-
1120-900-2120-403-111-12	21,658	-	1,158	6,000
2217-900-2120-400-111-10	21,658	-	1,158	-
1120-900-2113-400-111-04	49,634	2,000	-	-
Grand Total	691,693	10,000	2,316	24,000

Count of EXP	4	8	12	14	Grand Total
Row Labels	5	1	1	1	8
AA	2	3	2	2	9
BALDWIN, ALEC	1				1
BROWN, BOBBY		1			1
BUNNY, BUGS			1		1
CRICKET, JIMMY			1		1
DOE, JOHN				1	1
JOHN, JIMMY		1			1
JOHN, PAPA			1		1
JONES, JANE	1				1
JONES, JIMMY			1		1
Grand Total	7	4	3	3	17

14. Excel will also create recommended pivot tables. You may be able to use these with very little additional manipulation.