Office 2007
Pivot Table Quick Reference

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Drag fields onto the report

Click once on the field in the top part of the pivot table. Click and drag to the report

Tip: Drag to the report and watch for the grey "T" to appear between the columns – this is where the field will go

Remove data (numeric) fields from the report

	Fund	Object	Purpose	Program	Beginning Budget	Budget Adjustments	Current Budget
13							
14	Fund	Object	Purpose	Program	Beginning Budget	Budget Adjustments	Current Budget
15	⊟1	⊟111	⊟6941	00?	$129,660.00	$0.00	$129,660.00
16			6941 Total		$129,660.00	$0.00	$129,660.00
17		111 Total			$129,660.00	$0.00	$129,660.00
18		⊟112	⊟6942	00?	$288,444.00	$0.00	$288,444.00
19			6942 Total		$288,444.00	$0.00	$288,444.00
20		112 Total			$288,444.00	$0.00	$288,444.00
21		⊟113	⊟5850	069	$481.00	$64,069.00	$64,550.00
22			5850 Total		$481.00	$64,069.00	$64,550.00
23			⊟6110	00?	$257,952.00	$28,867.00	$286,819.00
24			6110 Total		$257,952.00	$28,867.00	$286,819.00

Click once on the header (in this example "Year-to-Date Expenses" and drag up and to the right until you see the red X.
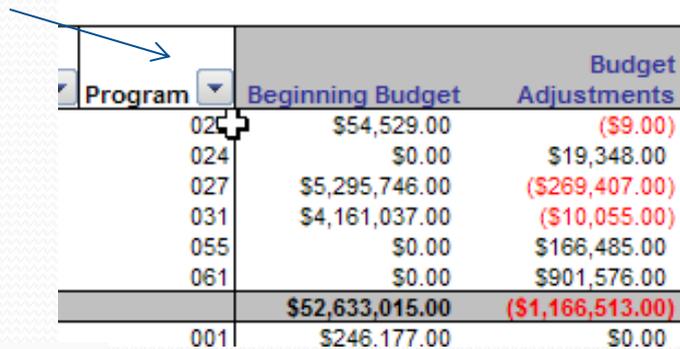
Note – using the original pivot table view button will bring back these fields

|	Year-to-Date Expenses	Encumbrances PO's Outstandin
et		
0	$108,050.00	$0.00
0	$108,050.00	$0.00
0	$108,050.00	$0.00

Filter on data in the pivot table

If filtering using the fields in the bottom portion of the table, simply click on the filter arrow

Program	Beginning Budget	Budget Adjustments
02	$54,529.00	($9.00)
024	$0.00	$19,348.00
027	$5,295,746.00	($269,407.00)
031	$4,161,037.00	($10,055.00)
055	$0.00	$166,485.00
061	$0.00	$901,576.00
	$52,633,015.00	($1,166,513.00)
001	$246.177.00	$0.00

If you only want to see a few items, take the check mark off of "Select All" and then select the items you need.

Value Filters
- ☐ (Select All)
- ☐ 001
- ☑ 002
- ☐ 003
- ☐ 005
- ☐ 007
- ☐ 009
- ☐ 011
- ☐ 013
- ☐ 015
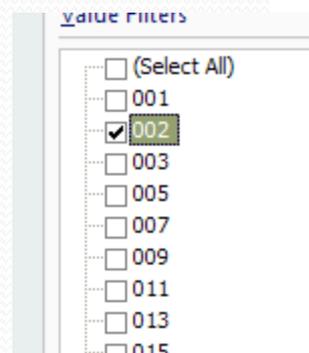
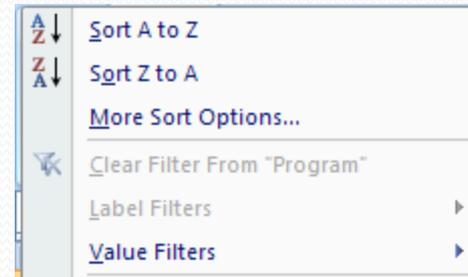# Filtering data in the pivot table
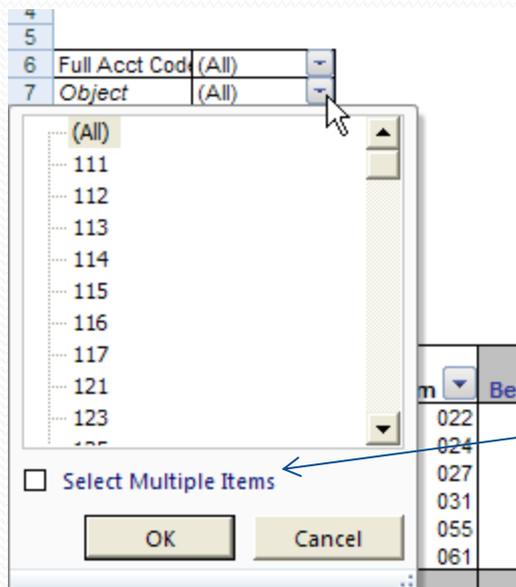
If you are filtering using a field at the top portion of the table, click on the filter arrow. Note – to select MULTIPLE items in this list, check the "Select Multiple Items check box.

Sorting data

Click on the filter arrow for the field that you want to sort on. Select either Sort A to Z or Sort Z to A

Example – sorted program Z to A:

Adding new fields to the pivot table

Sometimes all of the fields from the spreadsheet are not showing on the pivot table. For example, if you are working on the payroll spreadsheet and don't see the "# of Checks" field, you can easily add it.

Right Click anywhere in the pivot table and select Show Field list

Field Settings...

PivotTable Options...

Show Field List

Pay Amount   Yearly Sa

Grade
Step
% Emp.
# Checks
Ind.
Pay Group
Job Title
HR Position #
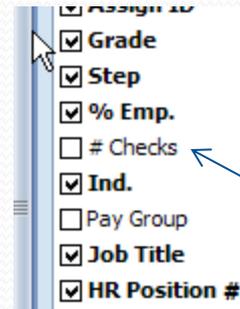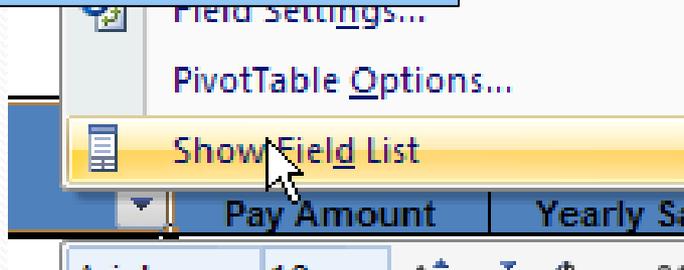
Fields that are already on the pivot table will have a check mark. For example, to add the # Checks to the pivot table, place a checkmark next to # Checks

Once the field is added to the pivot table, you can move it around as needed!

Adding your own fields to the pivot table

If you have added your own fields to the spreadsheet, you can also add those fields into the pivot table! For example, if you have added calculated columns to the Budget or Payroll Spreadsheet for budgeting next year, you can add those fields to the pivot table. When you add these fields to your spreadsheet, do not have blank columns between the main spreadsheet data and your new column.

Yearly Salary	Position Count	Projected Salary
$28,680.00	1.00	$ 30,114.00

For example, if I have created a Projected Salary field in the spreadsheet and now want to add this field to the pivot table…

2. Right click anywhere in the pivot table and select "Show Field List". Then place a check mark on the Projected Salary field.

1. Go to the pivot table and click on the Refresh Data button…

Refresh Data

PivotTable Options…

Show Field List

$28,680.00   1.00

☑ Yearly Salary
☑ Position Count
☑ Full Acct Code
☐ Projected Salary

Formatting data in the pivot table

If you add a field, the formatting may not be the way you want. To format a field in the pivot table (for example to set it in $ format)....

First, click once on a line in the data for the field that you want to format. Right click and select either "Number Format " or "Format Cell"

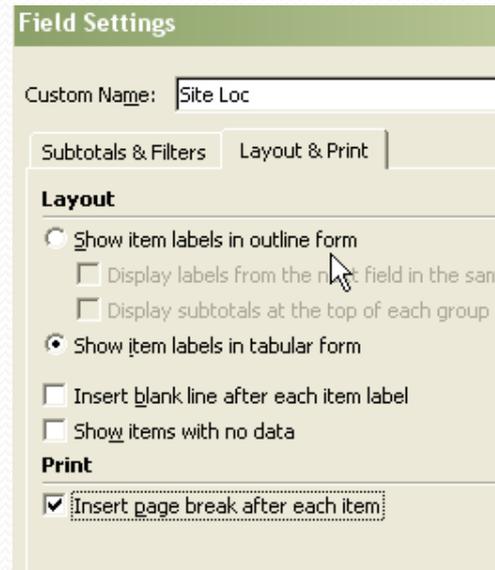# Page Breaks in the pivot table

You might want to have a page break when printing information in a pivot table. For example, you might want to have a page break after every fund or after every location.

Right click on the header for the field that you want to set the page break for. Select "Field Settings"

Click on the Layout and Print tab and put a checkmark on "Insert page break after each item."

Comparing data

In many cases, you may want to compare data. For example, in the budget spreadsheet, you may want to compare data from one location to another. Or in the Purchase Orders spreadsheet, you may want to compare month to month.

Example: Comparing budgets between 2 schools on the budget spreadsheet.

se ▼	Program ▼	Current Budget
	001	$42,792,555.00
	003	$25,071.00
	007	$134,079.00
	008	$334,000.00

1. We want to compare current budget numbers – so we would want to drag away all number fields except the "Current Budget" field.

Location ▼ Fund

- ☐ (Show All)
- ☐ 000
- ☐ 100
- ☑ 303
- ☑ 304
- ☐ 308
- ☐ 310

2. Filter for the schools you want to compare. Tip – in Office 2003, to select multiple entries, drag location to the bottom portion of the pivot table.

Location ▼	Fund ▼	Purpose ▼	Program ▼	Current Budget
000	1	5110	001	$42,792,555.00
			003	$25,071.00

3. Click and drag on the Location header and drag it ON TOP of the Current budget HEADER.

Current Budget			Location ▼		
Fund ▼	Purpose ▼	Program ▼	303	304	Grand Total
2	5110	001	$0.00	$0.00	$0.00
		061	$1,497.00	$7,335.00	$8,832.00
		743	$0.00	$0.00	$0.00
		802	$1,573.00	$7,709.00	$9,282.00

Removing extra subtotal lines

Excel will automatically add a subtotal line to all fields in the pivot table report except the last column. In some cases, you may not want a subtotal listed.

Ded Code	Full Name	Full Acct Code	En
⊟ 100EC	⊟ GILLIAM, TIA D	1.5110.001.121.340.000.00	
	GILLIAM, TIA D Total		
	⊟ LEWIS, HEATHER B	1.5110.027.142.308.000.00	
	LEWIS, HEATHER B Total		
	⊟ NOELL, STACY B	3.5210.144.121.324.000.00	
	NOELL, STACY B Total		

In this example, there is a subtotal after every name. We may want to remove this subtotal.

	Sort	▶	
	Filter	▶	Cou
✓	Subtotal "Full Name"		
	Expand/Collapse	▶	
➡	Group...		
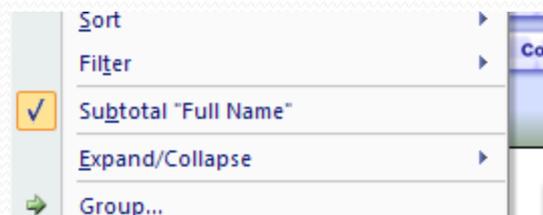
To remove the subtotal, right click on the heading for the field (in this case "Full Name". Notice that there is a check mark next to "Subtotal Full Name" . Click to remove the check mark and the system will remove the subtotal.

1				
2	Ded Code	*Full Name*	Full Acct Code	E
3	⊟ 100EC	⊟ GILLIAM, TIA D	1.5110.001.121.340.000.00	
4		⊟ LEWIS, HEATHER B	1.5110.027.142.308.000.00	
5		⊟ NOELL, STACY B	3.5210.144.121.324.000.00	