

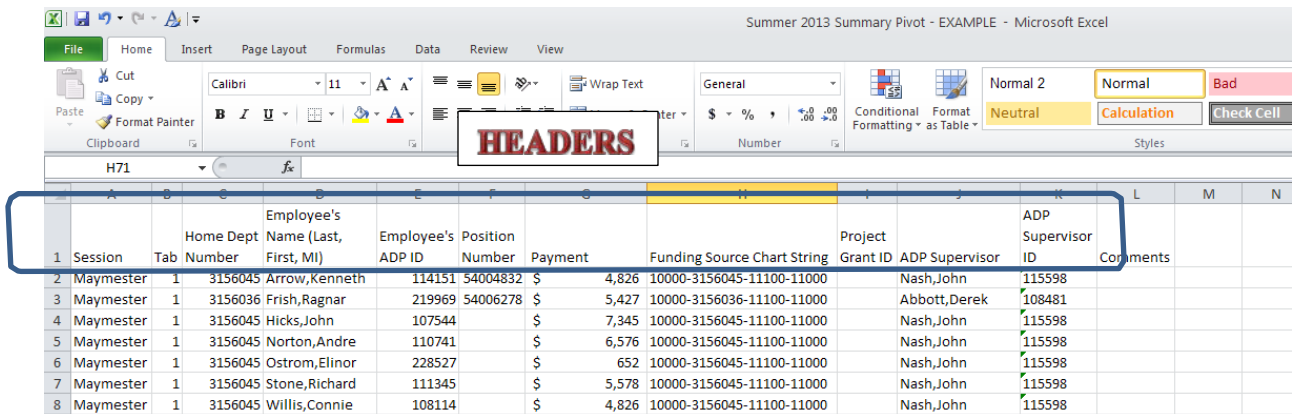
PIVOT TABLES

Getting Started

A pivot table report is an interactive report that lets you summarize and analyze a data set. Unlike other tables and filters, you can change the structure of the report simply by dragging fields in the table and turning on and off filters.

- **The Data:**

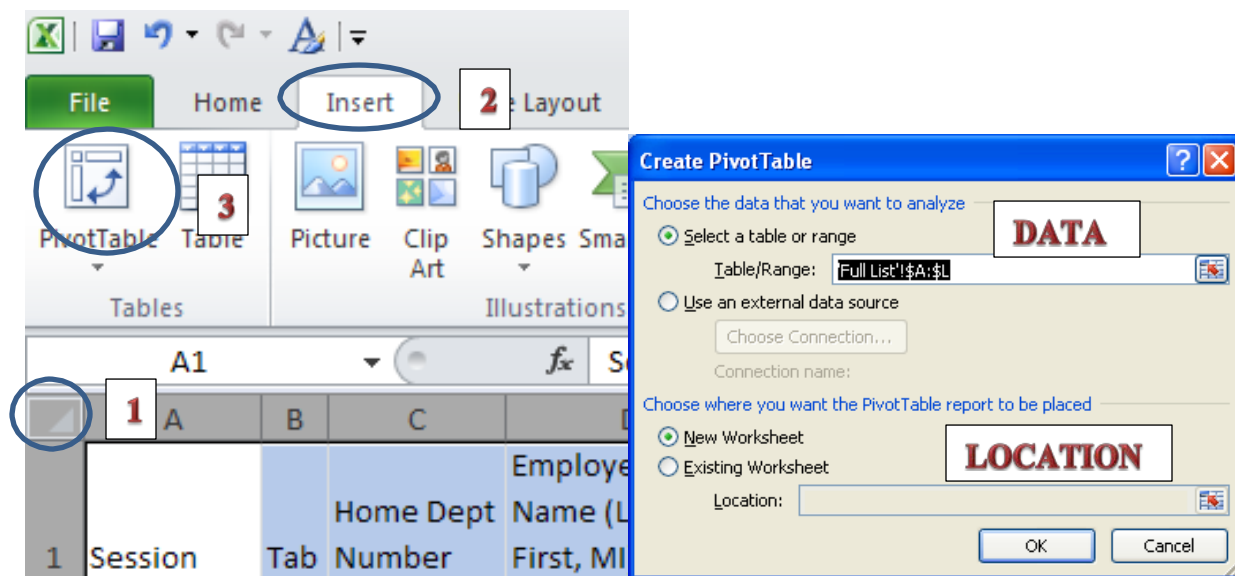
The data can come from any source into excel (PeopleSoft, Banner, ADP, etc.). The data does need to be displayed in column form with each column having a header.



1	Session	Tab	Home Dept	Employee's Name (Last, First, MI)	Employee's ADP ID	Position Number	Payment	Funding Source Chart String	Project Grant ID	ADP Supervisor	ADP Supervisor ID	Comments
2	Maymester	1	3156045	Arrow,Kenneth	114151	54004832	\$ 4,826	10000-3156045-11100-11000		Nash,John	115598	
3	Maymester	1	3156036	Frish,Ragnar	219969	54006278	\$ 5,427	10000-3156036-11100-11000		Abbott,Derek	108481	
4	Maymester	1	3156045	Hicks,John	107544		\$ 7,345	10000-3156045-11100-11000		Nash,John	115598	
5	Maymester	1	3156045	Norton,Andre	110741		\$ 6,576	10000-3156045-11100-11000		Nash,John	115598	
6	Maymester	1	3156045	Ostrom,Elinor	228527		\$ 652	10000-3156045-11100-11000		Nash,John	115598	
7	Maymester	1	3156045	Stone,Richard	111345		\$ 5,578	10000-3156045-11100-11000		Nash,John	115598	
8	Maymester	1	3156045	Willis,Connie	108114		\$ 4,826	10000-3156045-11100-11000		Nash,John	115598	

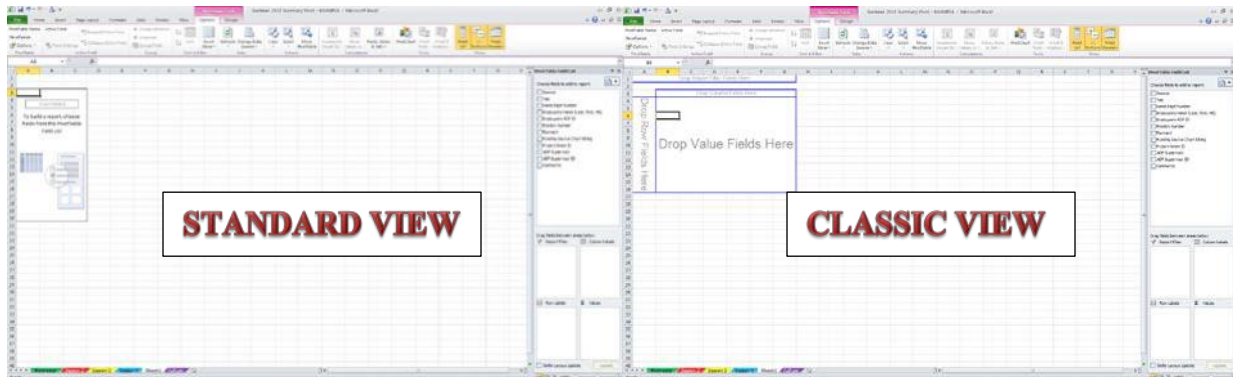
- **Creating a Pivot Table:**

To create a pivot table: (1) select your data, (2) select the insert ribbon, (3) select the PivotTable. Then confirm the data to use and the location to create the PivotTable.



- **Summarizing and Analyzing Data:**

Once you click [OK] the PivotTable will display. The standard view is a default, but not as intuitive. I change to the classic view, it enables dragging of fields in the grid. This can be done under the option menu, on the display tab.



Once created, you can produce reports like the on below.

Sum of Payment		Session				
Home Dept Number	Employee's Name (Last, First, MI)	Maymester	Session 2	Session 3	Session 4	Grand Total
3156036	Frish,Ragnar	\$ 10,563	\$ 11,838	\$ 15,240	\$ 9,970	\$ 47,611
	Tinbergen,Jan	\$ 4,166	\$ 416	\$ 3,936	\$ 2,194	\$ 10,712
3156045	Arrow,Kenneth	\$ 14,226	\$ 13,577	\$ 15,718	\$ 16,051	\$ 59,572
	Baker,Kage	\$ 394	\$ 7,205	\$ 6,756	\$ 1,246	\$ 15,601
	Hicks,John	\$ 7,345				\$ 7,345
	McCaffrey,Anne	\$ 9,523	\$ 9,610	\$ 9,653	\$ 9,649	\$ 38,435
	Norton,Andre	\$ 6,576	\$ 4,711	\$ 5,413	\$ 6,368	\$ 23,068
	Ostrom,Elinor	\$ 652	\$ 6,576	\$ 4,779	\$ 5,103	\$ 17,110
	Parker,Carl			\$ 1,500	\$ 1,500	\$ 3,000
	Stigler,George	\$ 12,975	\$ 10,017	\$ 11,473	\$ 9,593	\$ 44,058
	Stone,Richard	\$ 5,578	\$ 6,351	\$ 4,873	\$ 5,502	\$ 22,304
	Willis,Connie	\$ 4,826	\$ 4,950	\$ 6,453	\$ 5,231	\$ 21,460
3156046	Baker,Kage	\$ 6,484		\$ 1,146	\$ 7,604	\$ 15,234
3156055	Goldratt,Eli	\$ 4,194	\$ 2,255	\$ 1,315	\$ 6,936	\$ 14,700
	Kress,Nancy	\$ 9,503	\$ 9,505	\$ 9,490	\$ 9,566	\$ 38,064
Grand Total		\$ 97,005	\$ 87,011	\$ 96,245	\$ 96,513	\$ 376,774

The best way to learn to create reports is to open a PivotTable, then try options on your own.

Another option is the website *Atomic Learning*. It has helpful hints as well as videos and instructional tutorials. There are also tutorials for Google Applications and other Microsoft products, for those who have just migrated.

Website: <http://www.atomiclearning.com/highed/>

Username: uwg

Password: college