I. Overview and Requirements

- PivotTables enable you to aggregate, analyze, and drilldown detailed data quickly and easily.
- Requirements: a “flat file” table* that looks like this:

<table>
<thead>
<tr>
<th>Date</th>
<th>Object Code</th>
<th>Obj Desc</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/1</td>
<td>1210</td>
<td>SPA</td>
<td>$500</td>
</tr>
<tr>
<td>10/1</td>
<td>1310</td>
<td>EPA</td>
<td>$750</td>
</tr>
<tr>
<td>11/1</td>
<td>1110</td>
<td>EPA NT</td>
<td>$250</td>
</tr>
<tr>
<td>12/1</td>
<td>1210</td>
<td>SPA</td>
<td>$800</td>
</tr>
</tbody>
</table>

* NOTE: aggregated or “crosstab” data won’t work – cannot have headers along rows like this:

<table>
<thead>
<tr>
<th>Row header</th>
<th>Column header 1</th>
<th>Column header 2</th>
<th>Column header 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Row header</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

II. Initial Setup of Row and Column Labels

- Highlight a data table (headers and body) you’d like to summarize.
- Go to the Insert menu → Choose “PivotTable”.
- A new sheet will be added showing the following PivotTable wizard:

Your table headers will appear in this list as “fields” for you to choose. Drag any of these down to either the “Column labels” or “Row Labels” to create the indices of your PivotTable.

Drag fields that may be aggregated into the “Values” box.

Any field may also be used in the “Report Filter” box (next section).

- Experiment with different fields in the column label or row label.
- Multiple levels of labels may be used either in the column or row label.
III. Filters and Slicers

- **Filters** allow you to only show meaningful information, such as removing budget and encumbrance transactions from true financial transactions (e.g. Filter on “Code” to exclude the 50’s range).
- **Slicers allow you to visualize the specific filters:** (Excel 2010 only). Click anywhere on your PivotTable. Select Insert → Slicer. Choose the field for which you’d like to filter and click OK (you can choose more than one). Turn filter items on or off by clicking them. Multiple items may be selected using Ctrl (select each item individual) or Shift (click on two ends of a range) while clicking.

IV. Design and Display Options

- **Design options:** Click anywhere on the PivotTable to see the “PivotTable Tools” menu.
  - Choose any of the preset color-schemes. Choose to “band” rows or columns.
  - **PivotTable placement:** The default is a newly-created sheet but you can move it to an existing sheet. You can put two separate PivotTables adjacent to each other. In the PivotTable Tools “Options” ribbon, choose “Move PivotTable” in the “Actions” area and select a range. Be careful if there is a lot of existing data because the PivotTable will overwrite whatever is there.
  - **Field settings:** Set number format and subtotal preferences: Choose a field from the “Row Labels” box and click “Field Settings…” (You can also right-click from a field directly from the PivotTable and choose Field Settings.)
  - **Tip:** Use the Classic PivotTable View to enable better presentation of multiple levels of row labels. Right-click on the PivotTable, choose “PivotTable Options…”, choose the “Display” table, and check “Classic PivotTable layout”
  - **Control which lines subtotal:** You can turn off subtotals for more succinct reporting especially if some fields are just descriptors (e.g. object code name).
  - **PivotCharts:** Just like how PivotTables are dynamic summaries of data, PivotCharts are dynamic charts based off of your PivotTable. These are only useful if your data facilitates charting. To add, click on your PivotTable, and select “PivotChart” from the PivotTable Tools Options ribbon under Tools. Choose the type of chart that you’d like to present.

V. Other Tips and Further Training

- **Lynda.com course:** Excel 2010 Pivot Tables in Depth
- **Create an Index for VLOOKUP:** The PivotTable effectively creates a unique index as each column label and row label. This is useful if you want to understand a range of values in a data set for the purpose of doing a VLOOKUP,
- **Ensure a clean flat file:** Finan$eer automatically adds a “total” row in the data, try to exclude this to ensure integrity of the PivotTable.