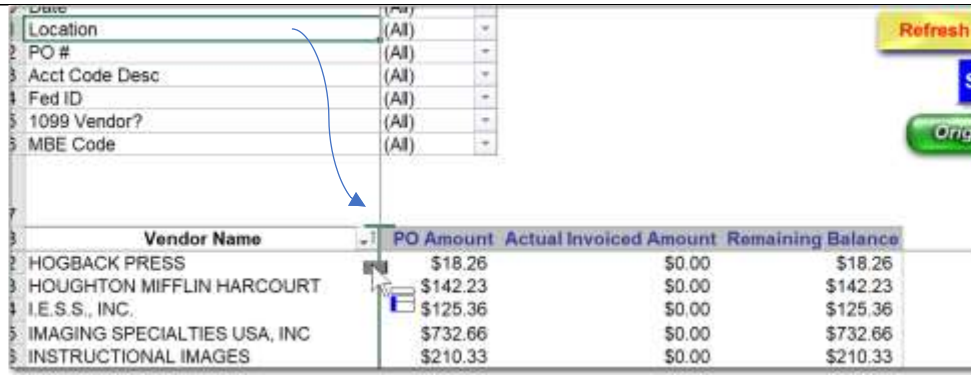
Pivot Table Cheat Sheet:

Adding/Re-arranging Columns on the Pivot Table

Any column from the top part of the table can be pulled down into the report. Simply click and drag from the top part of the pivot table onto the report. Watch for the grey "T" before releasing the mouse.

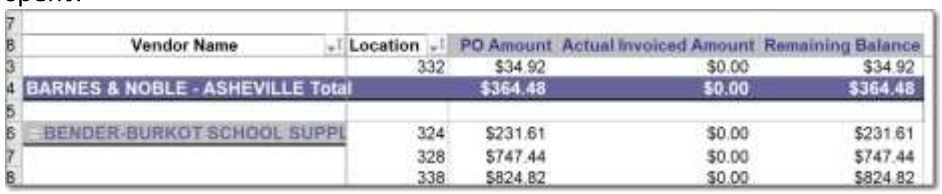
Example shown: Move location from the top onto the report – behind the vendor name. This provide a report by vendor name.



Location	(All)
PO #	(All)
Acct Code Desc	(All)
Fed ID	(All)
1099 Vendor?	(All)
MBE Code	(All)

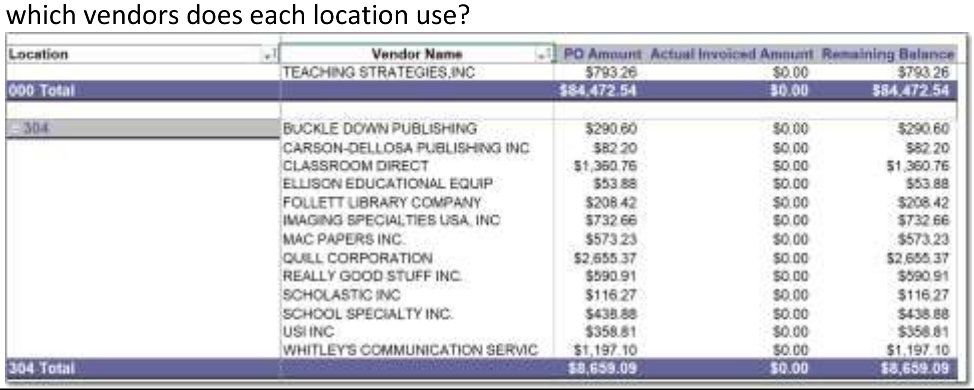
Vendor Name	PO Amount	Actual Invoiced Amount	Remaining Balance
HOGBACK PRESS	$18.26	$0.00	$18.26
HOUGHTON MIFFLIN HARCOURT	$142.23	$0.00	$142.23
I.E.S.S., INC.	$125.36	$0.00	$125.36
IMAGING SPECIALTIES USA, INC	$732.66	$0.00	$732.66
INSTRUCTIONAL IMAGES	$210.33	$0.00	$210.33

Result: - Which locations have used Bender-Bukot School Supplies and how much spent?



Vendor Name	Location	PO Amount	Actual Invoiced Amount	Remaining Balance
	332	$34.92	$0.00	$34.92
BARNES & NOBLE - ASHEVILLE Total		$364.48	$0.00	$364.48
BENDER-BURKOT SCHOOL SUPPL	324	$231.61	$0.00	$231.61
	328	$747.44	$0.00	$747.44
	338	$824.82	$0.00	$824.82

If you move the Location field to the left of Vendor, it's a totally different view – which vendors does each location use?



Location	Vendor Name	PO Amount	Actual Invoiced Amount	Remaining Balance
	TEACHING STRATEGIES,INC	$793.26	$0.00	$793.26
000 Total		$84,472.54	$0.00	$84,472.54
304	BUCKLE DOWN PUBLISHING	$290.60	$0.00	$290.60
	CARSON-DELLOSA PUBLISHING INC	$82.20	$0.00	$82.20
	CLASSROOM DIRECT	$1,360.76	$0.00	$1,360.76
	ELLISON EDUCATIONAL EQUIP	$53.88	$0.00	$53.88
	FOLLETT LIBRARY COMPANY	$208.42	$0.00	$208.42
	IMAGING SPECIALTIES USA, INC	$732.66	$0.00	$732.66
	MAC PAPERS INC.	$573.23	$0.00	$573.23
	QUILL CORPORATION	$2,655.37	$0.00	$2,655.37
	REALLY GOOD STUFF INC.	$590.91	$0.00	$590.91
	SCHOLASTIC INC	$116.27	$0.00	$116.27
	SCHOOL SPECIALTY INC.	$438.88	$0.00	$438.88
	USI INC	$358.81	$0.00	$358.81
	WHITLEY'S COMMUNICATION SERVIC	$1,197.10	$0.00	$1,197.10
304 Total		$8,659.09	$0.00	$8,659.09

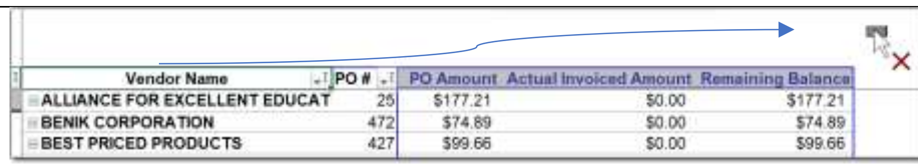
Adding fields that don't show on the pivot table

If you field doesn't show on the report at the top, you can right click on the pivot table and select "Show Field List"

Fields in bold are already on the pivot table. If you wanted to add a field such as the Req # from the list, simply click and drag it to the pivot table – either to the top or onto the report.

Removing Columns or Data from the Pivot Table

Columns or data values can be removed from the report by clicking and dragging the item off the report. Drag up and to the right until you see the red X.



Subtotals

Removing Extra SubTotals from the report

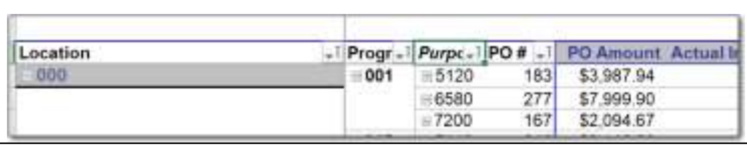
As you drag columns onto the pivot table report, Excel will try to determine if a subtotal is needed. Many times you will want to add or remove subtotals.

In this example, we added the Program and Purpose columns to the report. Notice how Excel automatically added subtotals to these columns.

To remove the subtotals, double click on the column header (example, double click on Program). Select None for the Subtotals.

Do the same for the Purpose Column and now your report looks like this:

Example – Added Program and Purpose columns to the report:

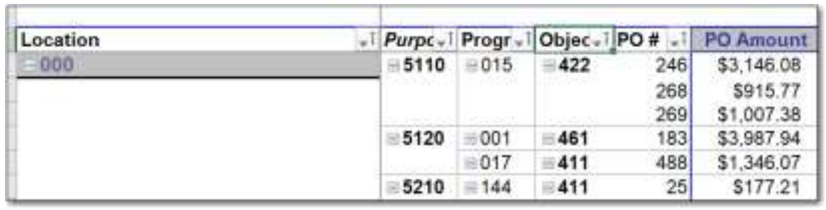


Adding a Subtotal to a Column in the Report

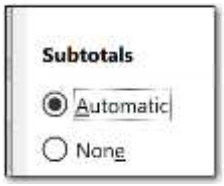
If you need to add a subtotal to a column in a report, double click on the heading and select "Automatic".

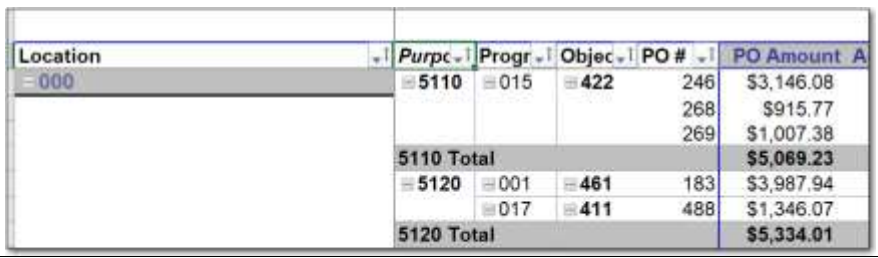
Double click on the Purpose Column…

Example – you want the following report to have a subtotal on the Purpose column:



Select "Automatic"

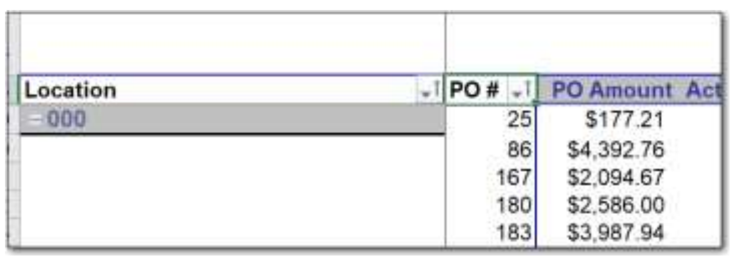


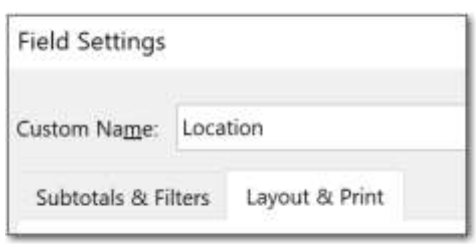


Page Breaks

You can add page breaks so that when you print a report, items will print on a separate page. A good example of this is a page break by Location. So for payroll, absences, budget info – set your location to the left most column on the report. Then double-click on the header and select the "Layout & Print" tab.

Example – Page break by Location:

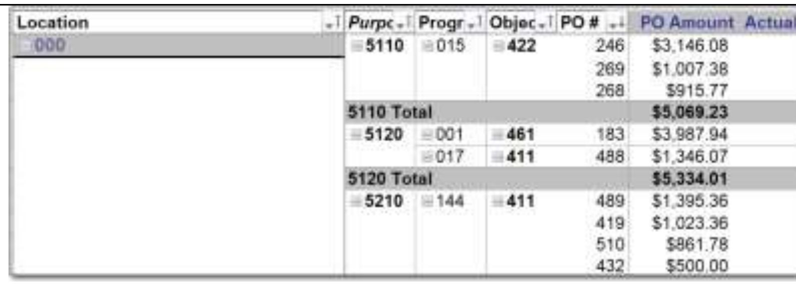




Select "Insert page break after each item"

Inserting Blank Lines between Items

Sometimes it is helpful to have blank lines between items. For example – if you wanted a blank line after each purpose code on this report.

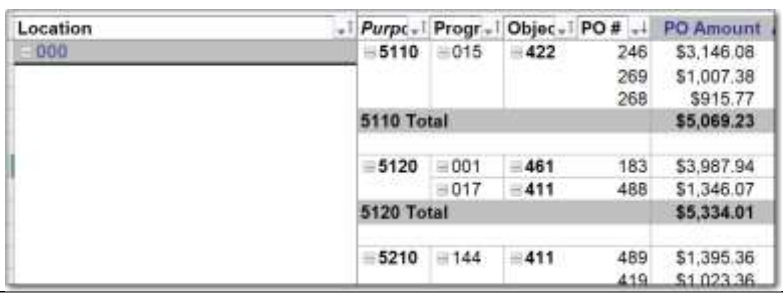


Location	Purpc	Progr	Objec	PO #	PO Amount Actual
000	5110	015	422	246	$3,146.08
				269	$1,007.38
				268	$915.77
	5110 Total				$5,069.23
	5120	001	461	183	$3,987.94
		017	411	488	$1,346.07
	5120 Total				$5,334.01
	5210	144	411	489	$1,395.36
				419	$1,023.36
				510	$861.78
				432	$500.00

Then double-click on the Purpose header and select the "Layout & Print" tab.

Select "Insert blank line after each item label"

Results:



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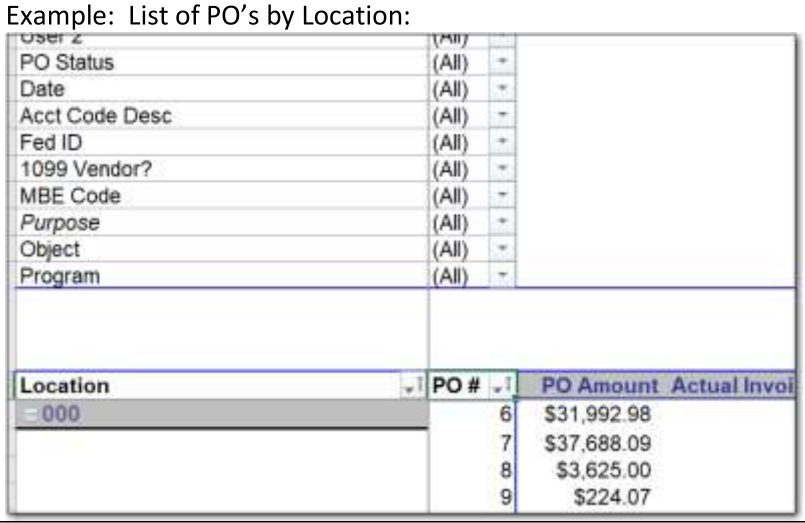
		017	411	488	$1,346.07
	5120 Total				$5,334.01
	5210	144	411	489	$1,395.36
				419	$1,023.36

Filtering items on the Pivot Table

You can filter on any item on the pivot table, whether it is actually on the report or at the top part of the report.

Example: List of PO's by Location:



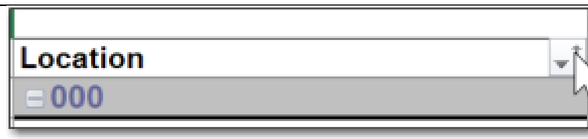
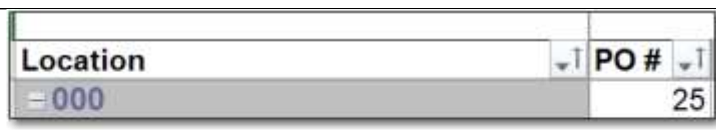
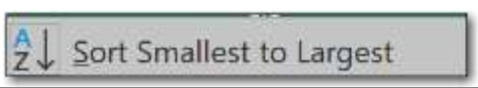
User 2	(All)
PO Status	(All)
Date	(All)
Acct Code Desc	(All)
Fed ID	(All)
1099 Vendor?	(All)
MBE Code	(All)
Purpose	(All)
Object	(All)
Program	(All)

Location	PO #	PO Amount Actual Invoi
000	6	$31,992.98
	7	$37,688.09
	8	$3,625.00
	9	$224.07

To filter for only Open PO's, use the filter for PO Status at the top. You can always visually tell if a column has filters applied.	 

Sorting

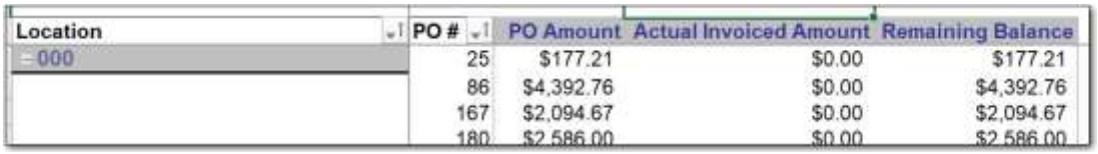
Sorting Report Columns

You can use the filter buttons on the columns to sort. For example, to sort the locations column, click on the filter for Locations and select A to Z (ascending) or Z to A (descending)	 
You can do this sort for each column, so I might also want to sort the PO numbers in the second column.	 

Sorting Values in the Pivot Table

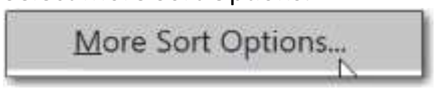
However, if you want to sort the actual data values in a pivot table, you don't have the filter buttons to use.

To sort on the data values (example – sort the largest PO amounts at the top), you have to sort on another column. So in this case, we will think about Sorting the PO # based on the PO Amount, so the sort is actually selected from the PO # column.

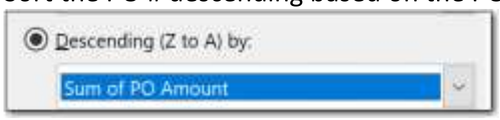


Click on the filter button in the PO # column:

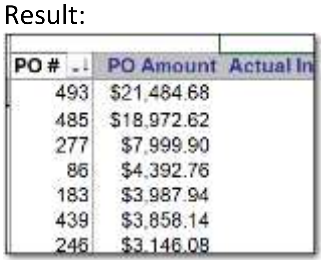
Select More Sort Options:



Sort the PO # descending based on the PO Amount.

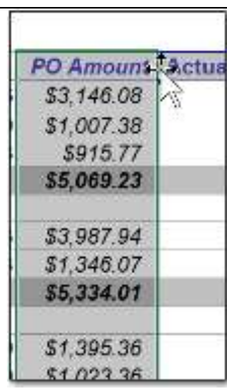


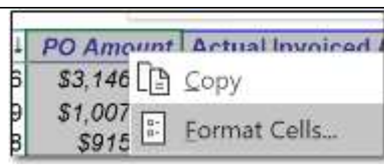
Result:



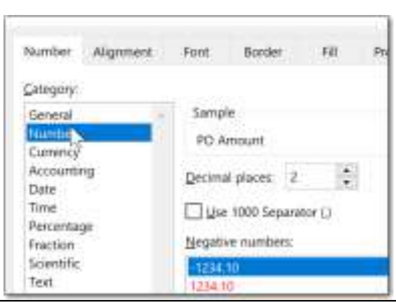
Formatting Numbers in the Pivot Table

To format data in the pivot table click once on the header to highlight the entire column. Then right click on the header and select Format Cells.



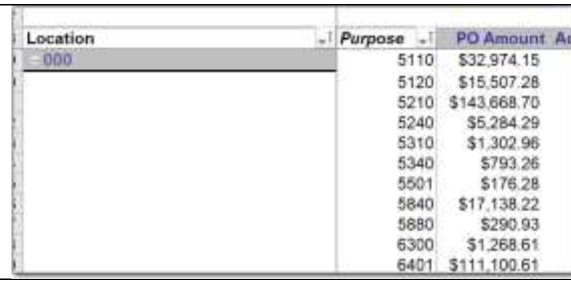


Select the Number tab and select your format and click OK.

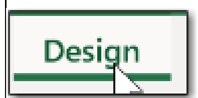


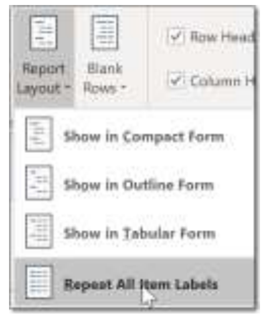
Repeat Item Labels

Sometimes your report doesn't repeat the item labels. In this example, the location.



To turn on/off the item labels, click anywhere in the pivot table. Click on Design at the top and then Report Layout, Repeat All Item Labels.





Result: