

VBk Practical Mathematics and Microsoft Excel Course

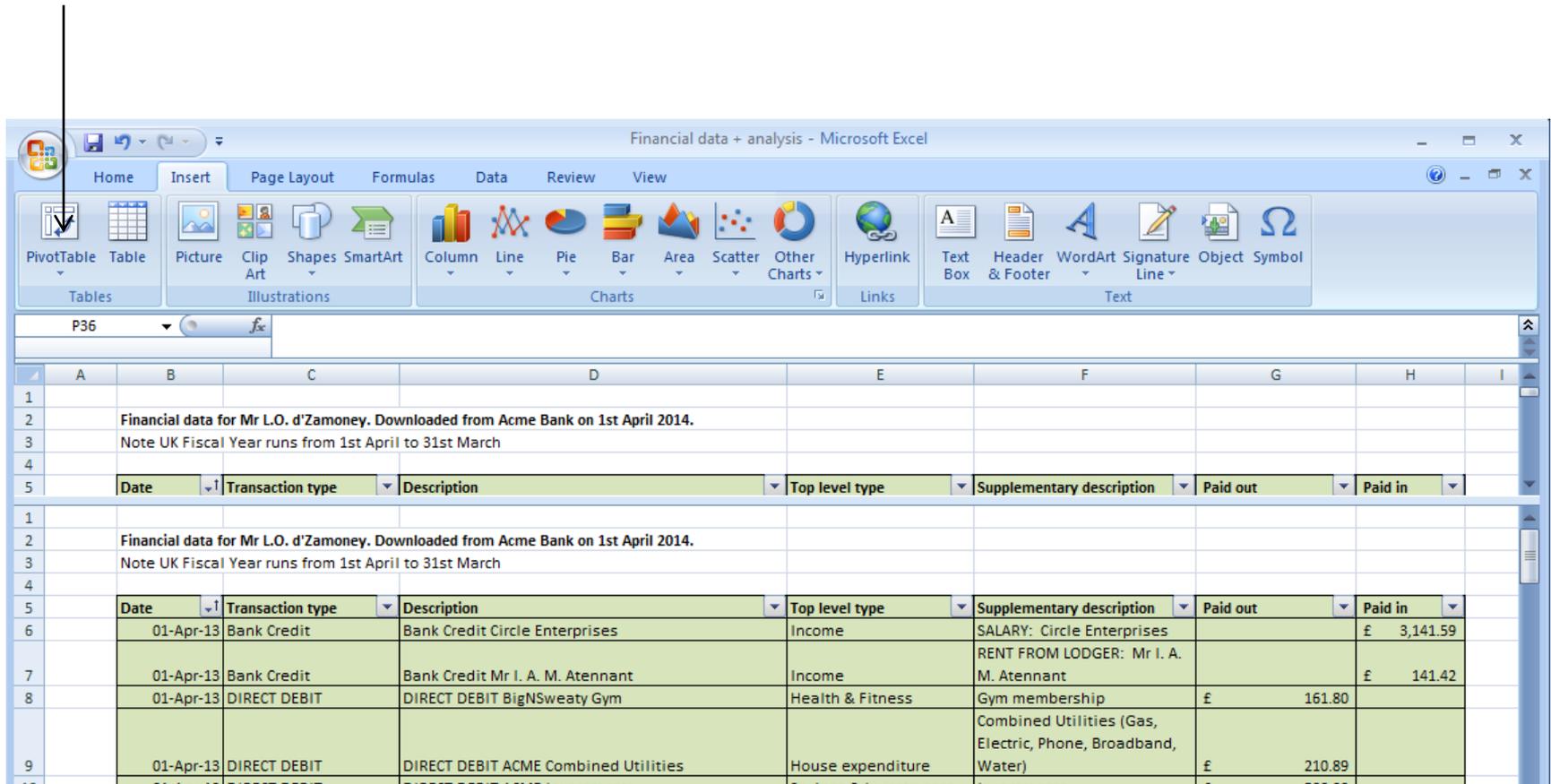
Pivot Tables

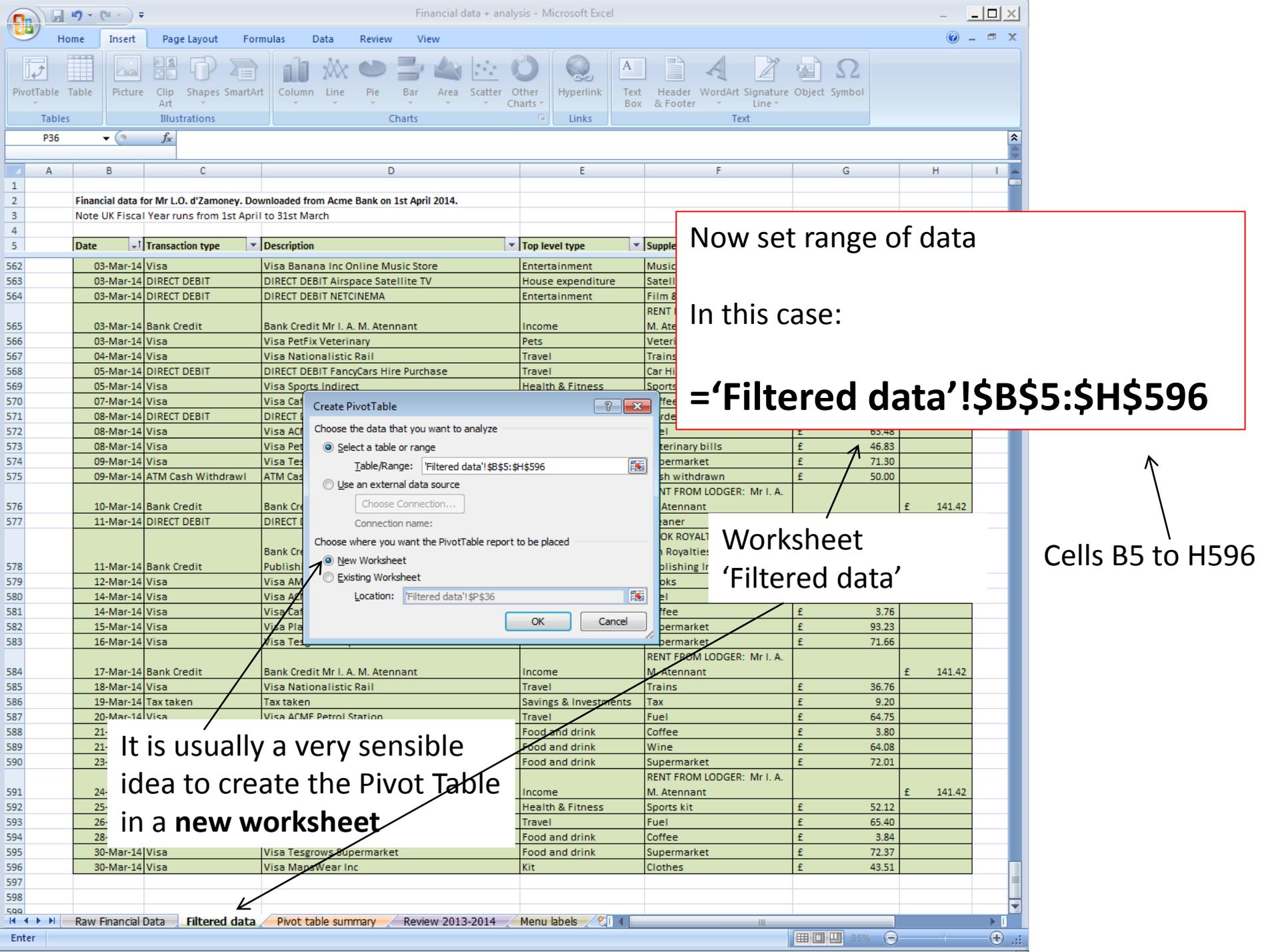


WINCHESTER
COLLEGE

Pivot Tables are a powerful feature of Excel which can be used to automatically summarise data contained within a spreadsheet.

To create one, load up a spreadsheet containing the data and then click on the **PivotTable** button on the **Insert** section of the icons along the top the Excel window. (“The Ribbon”).



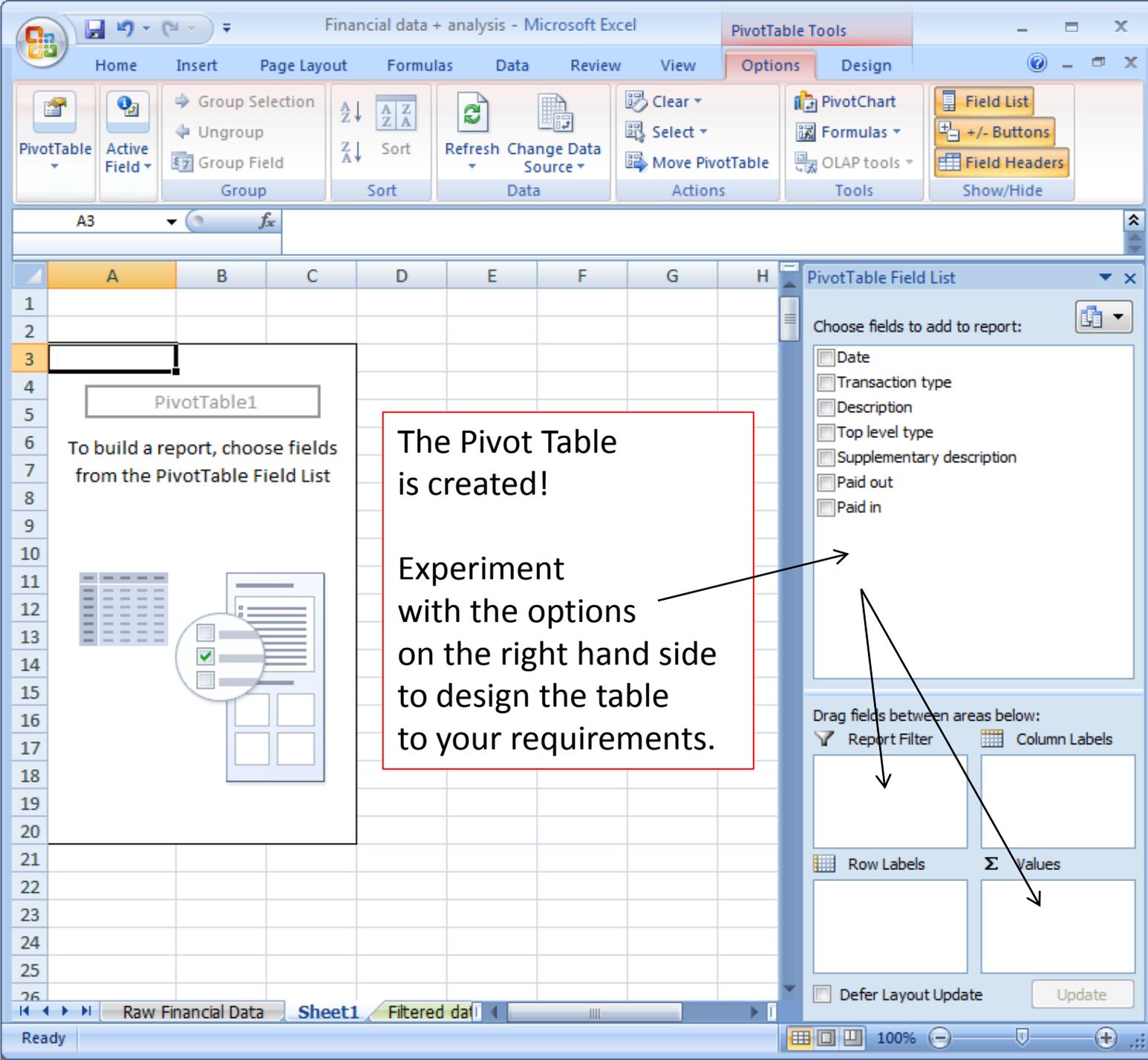


Now set range of data
In this case:
=‘Filtered data’!\$B\$5:\$H\$596

Worksheet
‘Filtered data’

Cells B5 to H596

It is usually a very sensible
idea to create the Pivot Table
in a **new worksheet**



PivotTable1

To build a report, choose fields from the PivotTable Field List



The Pivot Table is created!

Experiment with the options on the right hand side to design the table to your requirements.

PivotTable Field List

Choose fields to add to report:

- Date
- Transaction type
- Description
- Top level type
- Supplementary description
- Paid out
- Paid in

Drag fields between areas below:

Report Filter Column Labels

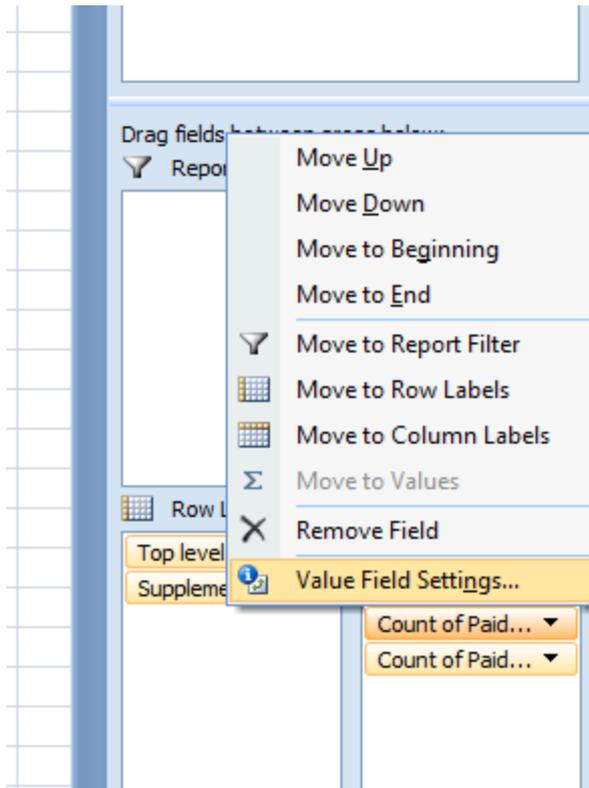
Row Labels Values

Defer Layout Update Update

Row Labels	Count of Paid in	Count of Paid out
Entertainment		48
Books		9
Film & Cinema		18
Kingsgate Club		1
Magazines		13
Music		7
Food and drink		155
Coffee		52
Restaurant		23
Supermarket		68
Wine		12
Health & Fitness		27
Dentistry		1
Gym membership		12
Haircut		8
Sports kit		6
Holidays		4
Russia Cross Country Ski trip (February 2014)		1
Western Isles of Scotland (August 2013)		3
House expenditure		74
Cleaner		12
Combined Utilities (Gas, Electric, Phone, Broadband, Water)		12
Council Tax		12
Gardener		12

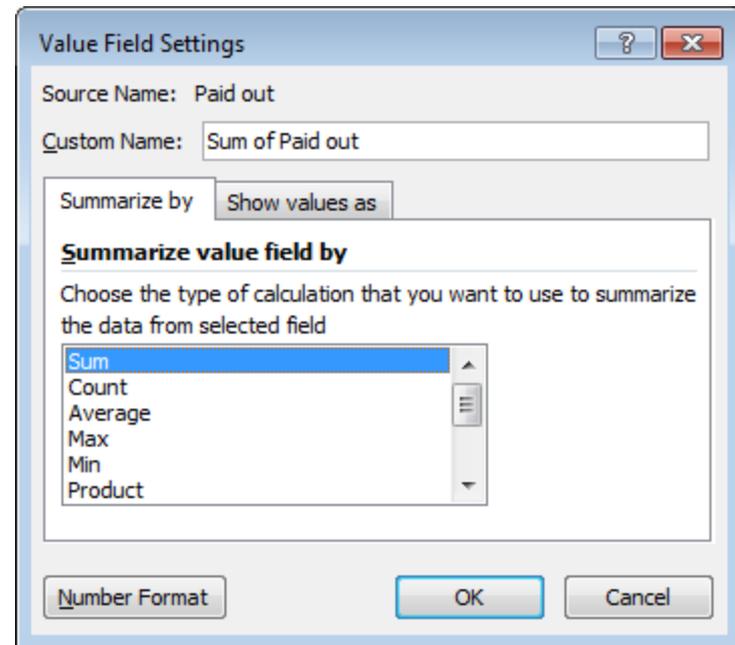
Date	Transaction type	Description	Top level type	Supplementary description	Paid out	Paid in
01-Apr-13	Bank Credit	Bank Credit Circle Enterprises	Income	SALARY: Circle Enterprises		£ 3,141.59
01-Apr-13	Bank Credit	Bank Credit Mr I. A. M. Atennant	Income	RENT FROM LODGER: Mr I. A. M. Atennant		£ 141.42
01-Apr-13	DIRECT DEBIT	DIRECT DEBIT BigNSweaty Gym	Health & Fitness	Gym membership	£ 161.80	

In this example the numbers of entries ('Count') are summed against two levels of description assigned to the financial transactions above.



To change the entries count to 'sum the values', click on the 'Count of ...' item and select **Value Field Settings**.

Change **Count** to **Sum** (or indeed something else, if a sum is not what you need).



Home

Insert

Page Layout

Formulas

Data

Review

View

Options

Design

Clipboard | Font (Calibri, 11, Bold, Italic, Underline, Paragraph) | Alignment (Text, Center, Right, Indent) | Number (Accounting, %, .00, .0) | Styles (Conditional Formatting, Format as Table, Cell Styles) | Cells (Insert, Delete, Format) | Editing (Sort & Filter, Find & Select)

C6 fx 3220.65784097485

		Values	
Row Labels		Sum of Paid in	Sum of Paid out
Entertainment		£	3,220.66
Books		£	425.57
Film & Cinema		£	487.15
Kingsgate Club		£	2,000.00
Magazines		£	260.00
Music		£	47.93
Food and drink		£	6,285.06
Coffee		£	156.55
Restaurant		£	1,256.53
Supermarket		£	4,175.62
Wine		£	696.36
Health & Fitness		£	2,614.83
Dentistry		£	211.40
Gym membership		£	1,941.60
Haircut		£	127.92
Sports kit		£	333.91
Holidays		£	5,356.56
Russia Cross Country Ski trip (February 2014)		£	2,456.00
Western Isles of Scotland (August 2013)		£	2,900.56
House expenditure		£	25,297.23
Cleaner		£	1,476.00
Combined Utilities (Gas, Electric, Phone, Broadband, Water)		£	2,290.74
Council Tax		£	1,955.49
Gardener		£	1,440.00

The formatting of these cells have also been changed to **Accounting** (with £ prefix), and two decimal places. Right click on the cells and select **Format Cells....** from the menu that appears to do this.

PivotTable Field List

Choose fields to add to report:

- Date
- Transaction type
- Description
- Top level type
- Supplementary description
- Paid out
- Paid in

Drag fields between areas below:

Report Filter | Column Labels

Σ Values

Row Labels | Σ Values

Top level type | Sum of Paid in

Supplementar... | Sum of Paid out

 Defer Layout Update

Update

Raw Financial Data | Sheet1 | Filtered data | Pivot table summ

Ready

100%