VBk Practical Mathematics and Microsoft Excel Course









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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").

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562	03-Mar-14	Visa	Visa Banana Inc Online Music Store	Entertainment	Music			
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568	04-Mar-14 05-Mar-14	DIRECT DEBIT	DIRECT DEBIT FancyCars Hire Purchase	Travel	Car Hi			
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575	09-Mar-14	ATM Cash Withdrawl	ATM Cas		sh withdrawn	£ 50.00	0	
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			Bank Cre		Royaltie:	Sheet		Cells B5 to H596
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582	15-Mar-14	Visa	Vica Pla	UK Cancel	permarket	£ 93.2	3	
585	16-Mar-14	Visa	Visa lei		RENT EREM LODGER: Mr.L.A	£ /1.60	6	
584	17-Mar-14	Bank Credit	Bank Credit Mr I. A. M. Atennant	Income	M Atennant		£ 141.42	
585	18-Mar-14	Visa	Visa Nationalistic Rail	Travel	Trains	£ 36.7	6	
586	19-Mar-14	Tax taken	Tax taken	Savings & Investments	Tax	£ 9.20	0 E	
588	20-00-12			Food and drink	Coffee	£ 3.80	0	
589	21-	is usually	v a verv sensible	Food and drink	Wine	£ 64.0	8	
590	23-			Food and drink	Supermarket	£ 72.0	1	
591	24. iC	lea to cre	eate the Pivot Table	Income	RENT FROM LODGER: Mr I. A.		£ 141.42	
592	25-			Health & Fitness	Sports kit	£ 52.13	2	
593	26-	i a new w	vorksheet	Travel	Fuel	£ 65.40	0	
594	28-			Food and drink	Coffee	£ 3.84	4	
595	30-Mar-14	Visa	Visa Tesgrows Supermarket	Food and drink	Supermarket Clothes	£ 72.3	1	
597	50 Mid1-14	1130		N.C.	ciones	- 45.5.	±	
598		1/						
599 I4 4 > >I	Raw Financial	Data Filtered data	Pivot table summary Review 2013-2014	Menu labels 🔗 🚺				
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4			Values					
5	Row Labels		Count of Paid in	Count of Paid out	C	hoose fields to add to r	eport:	
6	Entertainment			48	8	Date		
7	Books			9		Transaction type		
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12	Food and drink			159	;			
13	Coffee			52	2			
14	Restaurant			23	;			
15	Supermarket			68	5			
16	Wine			12	2			
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19	Gym membership			12	2 D	rag fields between area	as belo	w:
20	Haircut			8	5	Report Filter	📖 с	olumn Labels
21	Sports kit		Σ۷	alues 🔻				
22	Holidays			4	L			
23	Russia Cross Country Ski t	rip (February 2014)		1				
24	Western Isles of Scotland	(August 2013)		3				
25	House expenditure			74	L 📕	Row Labels	ΣV	alues
26	Cleaner			12	2	Top level type 🔻	Coun	it of Paid in 🔻
27	Combined Utilities (Gas, E	Electric, Phone, Broadband, Water)		12	2	Supplementar 🔻	Coun	it of Paid ▼
28	Council Tax			12	2			
29	Gardener			12	2		L_	
R.	Raw Financial Data	Sheet1 Filtered data Pivot table summary				Defer Layout Update	*	Update
Date	Transaction type	Description	Top level type	Supplement	ary description	Paid out		Paid in
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0	1-Apr-13 DIRECT DEBIT	DIRECT DEBIT BigNSweaty Gym	Health & Fitness	Gym membe	rship	£	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).

Value Field Settings	×										
Source Name: Paid out											
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4			Values								
5	Row Labels		🗾 Sum of Pa	id in Su	m of Paid out	Choose f	fields to add to report:				
6	Entertainment			£	3,220.66	Date					
7	Books			£	425.57	Desc	ription				
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11	Music			f	47.93	🗸 Paid	out				
12	Food and drink	have also been changed t	0 /	£	6.285.06	V Paid	in				
13	Coffee	Accounting (with f prefix) and	£	156.55						
14	Restaurant			£	1,256.53						
15	Supermarket	two decimal places. Right	click on	£	4,175.62						
16	Wine	the cells and select Form :	at	£	696.36						
17	Health & Fitness			£	2,614.83						
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19	Gym membership	annears to do this		£	1,941.60	Drag field	ds between areas below:				
20	Haircut			£	127.92						
21	Sports kit			£	333.91		Z values				
22	Bussia Cross Country Ski tri	in (Eebruany 2014)		E E	2 456 00						
23	Western Isles of Scotland ((reordary 2014)		f	2,450.00						
25	Believe expenditure			£	25.297.23	Rov	w Labels Σ Values				
26	Cleaner			£	1,476.00	Top lev	vel type Sum of Paid in				
27	Combined Utilities (Gas, El	ectric, Phone, Broadband, Water)		£	2,290.74	Suppler	mentar Sum of Paid out				
28	Council Tax	-		£	1,955.49						
29	Gardener			£	1,440.00	Defe	r Layout Update Update				
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