

CREATING A PIVOT TABLE FOR CONTINUATION BUDGET

Create a pivot table with your data (Data tab) by selecting cell A1, click the “Insert” tab, and click “Pivot Table” on the left side of the menu bar. Drag the following fields into the grid below as shown (*note that “SBS2” will appear after the grouping procedure below*):

Drag fields between areas below:

FILTERS		COLUMNS	
		SBS2 ▼	
		SBS ▼	
ROWS		VALUES	
UNIT ▼	▲	Sum of SumNA ▼	
FINANCI... ▼			
D-Level ▼			
FUND ▼			
NCHEMS ▼	▼		

☐ Defer Layout Update

In the pivot table:

Group account codes by revenue & expenditure

1. Highlight all revenue SBS codes (10XXX)
2. Right click
 - a. Choose “Group”
3. Highlight all expenditure SBS codes (7XXXX)
4. Right click
 - a. Choose “Group”

To sum the groups:

1. Left click on SBS2 box in pivot table
 - a. Go to field settings
 - b. Click “Automatic” in Subtotals & Filters Tab
 - c. Click OK

All screenshots show Microsoft Excel 2013 in default layout.

Microsoft Excel 2013 interface showing a PivotTable for FY14 CRCD Chukchi - Excel. The PivotTable is structured with Row Labels, Column Labels, and Grouped Totals.

PivotTable Fields:

- Filters:** ORG, FUND, ACCT, PosNum, WorkPercent, SumNA, SBS, D-Level, NCHEMS, PosNum Issues, Comments, FINANCIAL MANAGER, IINIT.
- Columns:** SBS2, SBS.
- Rows:** UNIT, FINANCIAL, D-Level, FUND.
- Values:** Sum of SumNA.

PivotTable Data:

Row Labels	10020	10040	10380	10390	10480	Group1 Total	Group2	71000	72000	73000	74000	75000	77000	78000	Group2 Total
Chukchi Campus	966,200	1,056,200	210,200	6,000	101,000	2,339,600	1,723,500	74,200	479,000	20,600	1,000	26,200	15,100	2,339,600	
Tanner, Sheena Chukchi															
D43ADS - CC Administrative Support															
103010		733,900	2,200			736,100	539,900	20,900	142,000	15,000	1,000	2,200	15,100	736,100	
CC Instruction		22,000				22,000	5,500	13,000	3,500					22,000	
CC Academic Support		352,700				352,700	317,800	10,400	6,800	2,600			15,100	352,700	
CC Student Services		155,200				155,200	152,200	2,000	1,000					155,200	
CC Library Services		76,100				76,100	66,300	3,000	800	5,000	1,000			76,100	
CC Physical Plant		127,900				127,900	3,600		121,400	2,900				127,900	
CC Scholarships			2,200			2,200						2,200		2,200	
142072		5,000				5,000	5,000							5,000	
CC Academic Support		5,000				5,000	5,000							5,000	
D43AL - CC Arts & Letters															
103010		266,800	50,000			316,800	316,300			500				316,800	
CC Instruction		266,800	50,000			316,800	316,300			500				316,800	
D43DEV - CC Developmental Ed & CRCD Math															
103010			37,300			37,300	37,200			100				37,300	
CC Instruction			37,300			37,300	37,200			100				37,300	
D43GRT - CC Grant															
998000	966,200				100,000	1,066,200	680,900	51,300	327,000	3,000		4,000		1,066,200	
CC Instruction	966,200				100,000	1,066,200	680,900	51,300	327,000	3,000		4,000		1,066,200	
D43ICT - CC Indigenous, Comm & Tribal Progs															
103010			9,300			9,300	8,300			1,000				9,300	
CC Instruction			9,300			9,300	8,300			1,000				9,300	
D43OTI - CC Other Instruction															
103010		50,500	23,600	6,000	1,000	81,100	48,600	2,000	10,000	500		20,000		81,100	
CC Instruction		50,500	23,600	6,000	1,000	81,100	48,600	2,000	10,000	500		20,000		81,100	
D43SCI - CC Science															
103010			87,800			87,800	87,300			500				87,800	
CC Instruction			87,800			87,800	87,300			500				87,800	
Grand Total	966,200	1,056,200	210,200	6,000	101,000	2,339,600	1,723,500	74,200	479,000	20,600	1,000	26,200	15,100	2,339,600	

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