Section 4 - PivotTables and PivotCharts

What is a PivotTable

In the earlier versions of **Access**, a **Crosstab** query was available. This type of query was designed to evaluate numeric fields in a spreadsheet appearance.

The PivotTable view of data also presents data in a spreadsheet appearance. PivotTables in **Access** can use various objects as the source: tables, forms, queries or reports. You can use functions such as sum, average, count, maximum and minimum to evaluate numeric data in a PivotTable.

PivotTables have field placement options for both columns and rows. The manipulation of field placement is easily accomplished in PivotTable view. PivotTables in **Access** are similar to PivotTables in **Excel**, but they are not identical. If you are familiar with creating PivotTables in **Excel**, it may take some time to be comfortable with the differences.

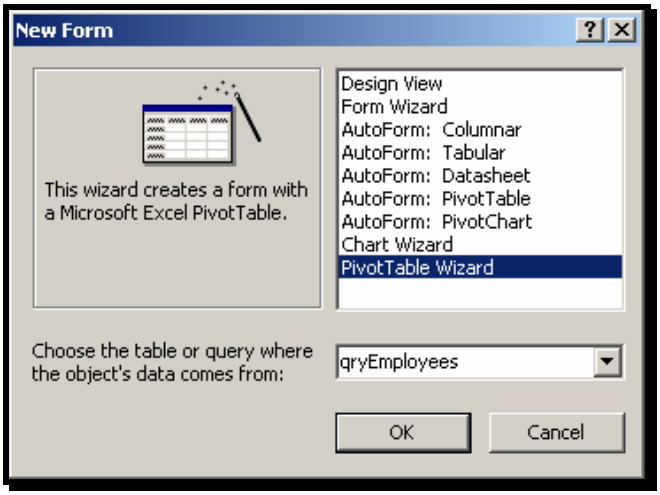
Creating a PivotTable

PivotTables can be based on a query and displayed in **PivotTable View**. PivotTables may be created with the **Form Wizard** or **Report Wizard**.

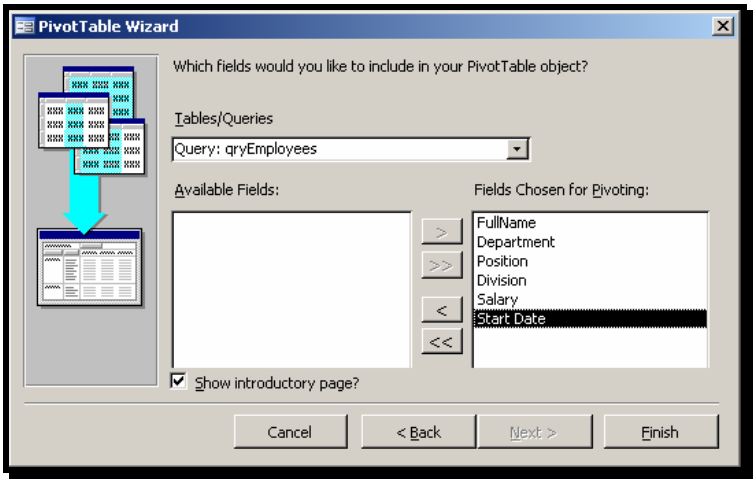
In this exercise, you will build a PivotTable using the **Form Wizard** and an existing query.

1. Open the database **Tables for Pivots.mdb**.
2. Click on the **Forms** Objects tab and click the **[New]** button.

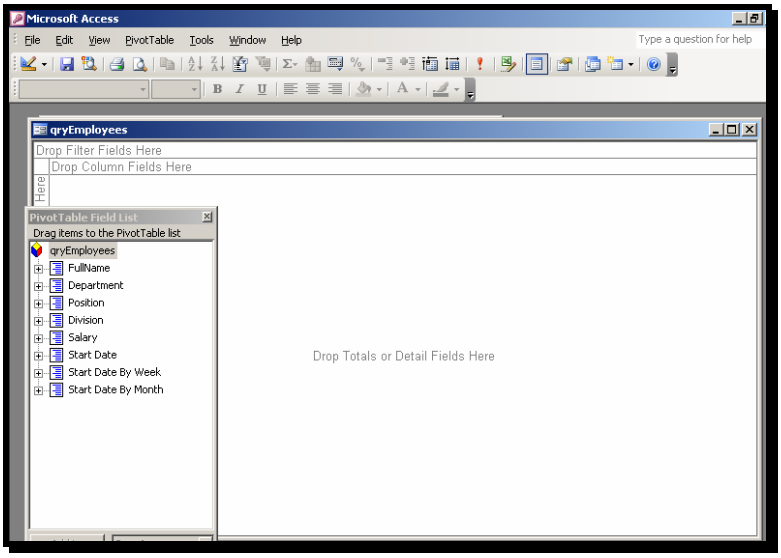
3. Select **PivotTable Wizard** and **qryEmployees** for the source.



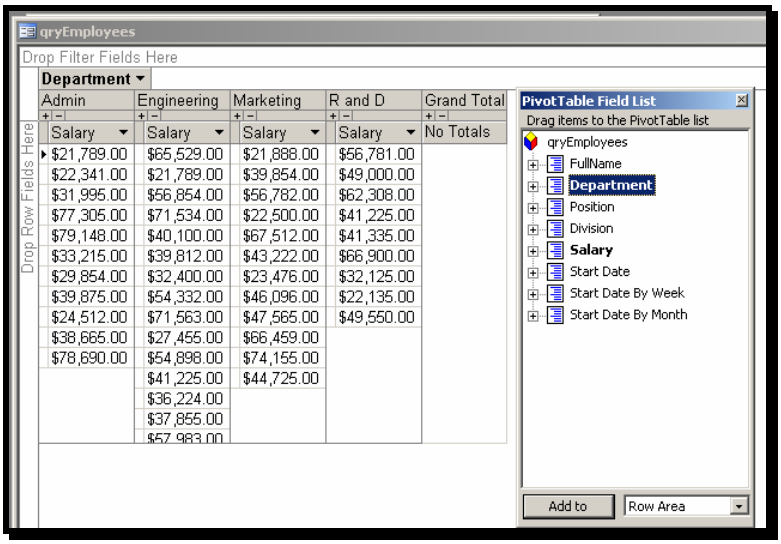
4. Click the **[OK]** button.
   A window defining PivotTables will open.
5. Click **[Next]**.
6. Select all of the fields.



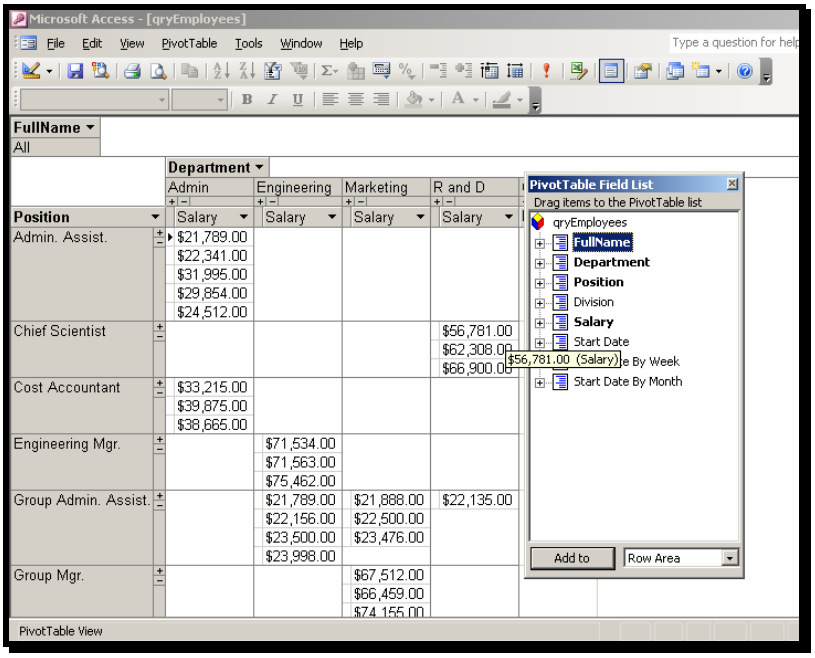
7. Click the **[Finish]** button.
   A blank PivotTable form will appear, as shown below.



8. From the **PivotTable Field List**, drag the **Salary** field to the middle of the PivotTable where you see the text "**Drop Totals or Delete Fields Here**."
9. From the **PivotTable Field List**, drag the **Department** field to the area defined as "**Drop Column Fields Here**."
   *Notice the pivot is populated with the data from the **Salary** and **Department** fields and both fields appear bold in the Field List.*



10. Drag the **Position** field to the area defined as "**Drop Row Fields Here**."
11. Drag the **FullName** field to the area defined as "**Drop Filter Fields Here**."
    *The completed **PivotTable** appears below.*

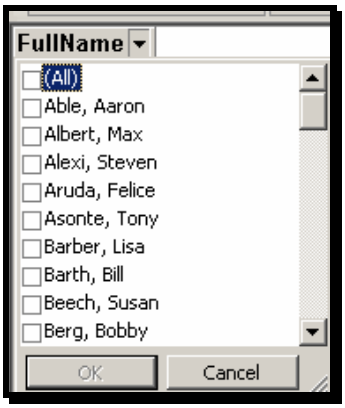


12. Save the form as **frmEmployeesPivot**.
    Leave the form open for the next exercise.

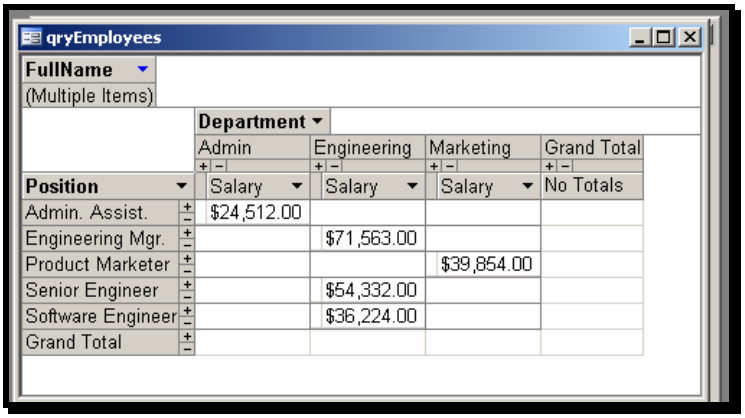
Filtering Data in a Pivot Table

In this exercise, you will filter the data in your **PivotTable** using the selection arrows for **Filter Fields**, **Row Fields** and **Column Fields**. Since fields currently occupy the Page, Row and Column areas of the PivotTable, the field names will appear with drop-down arrows similar to AutoFilters in **Excel**. These arrows allow you to filter data for each field added to the table.

1. Click on the filter arrow for the **FullName** field.
2. Click in the check box to uncheck the **All** check box.

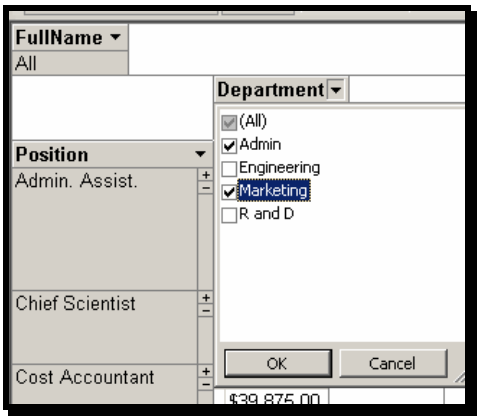


3. Click in the appropriate check boxes for the following names: **Barber, Lisa; Ferngood, Jules; Fine, Caroline; Lin, Michael** and **Wells, Jason**.
4. Click the **[OK]** button.
   The PivotTable is filtered by those names.

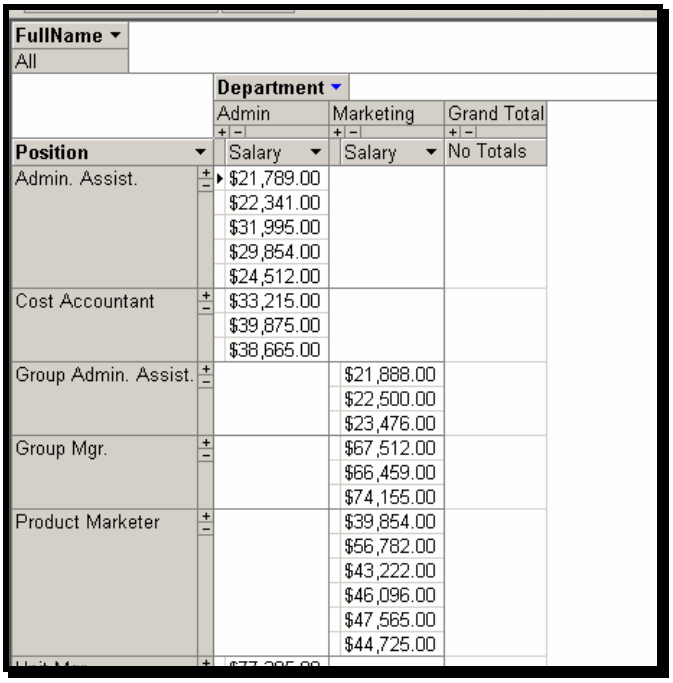


5. Click the filter arrow for the **FullName** field again and click the **All** check box.
6. Click the **[OK]** button.
   All the employees are now included in the table.
7. Click the filter arrow for the **Department** field.

8. Click to uncheck the **All** check box.
9. Click to select the check boxes for the **Admin** and **Marketing** fields.



10. Click the **[OK]** button.
    *The PivotTable is filtered by the **Department** field.*

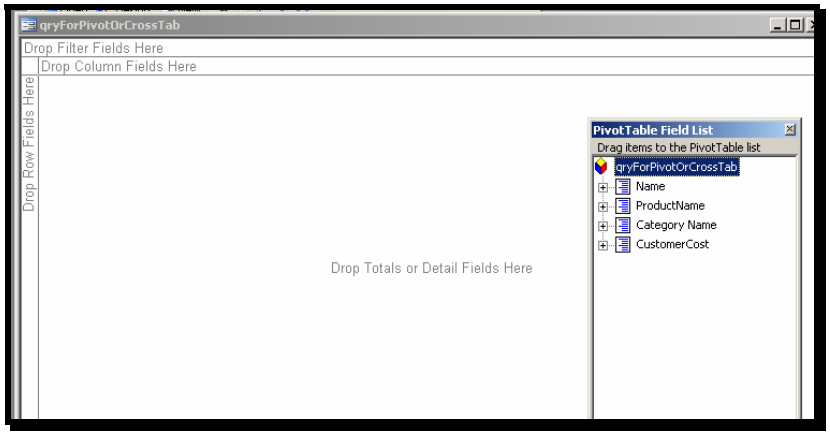


11. Check **All** for the **Department** field check box
12. Click on the **[OK]** button.
    This will restore all of the Departments to the table.

Section 4
Summary Exercises

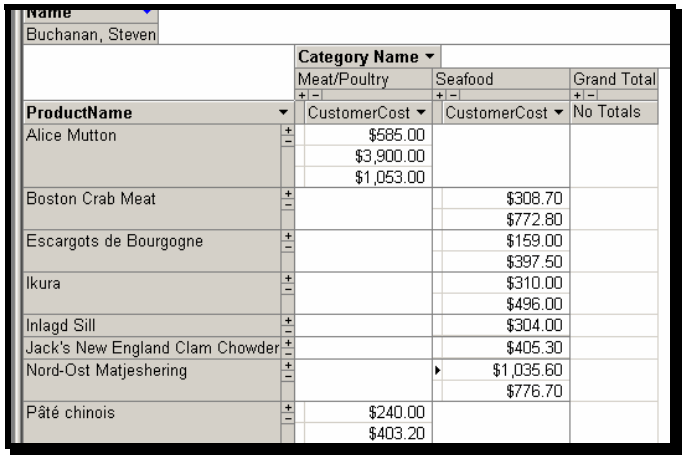
Part One

1. Open the **AdvAccess** database, if it is not already open.
2. Click the **Forms** Objects tab and create a new form using the **PivotTable Wizard**.
3. Select **qryForPivotOrCrossTab** as the record source.
4. Select the following fields: **Name**, **CategoryName**, **ProductName** and **CustomerCost**.



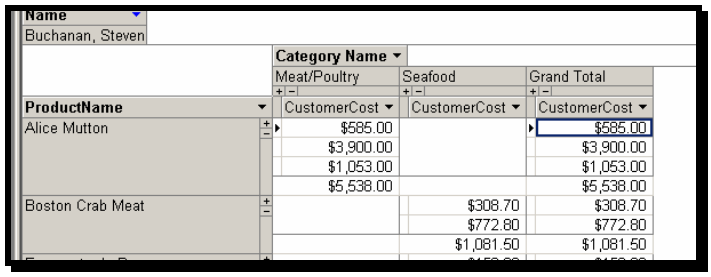
5. Drag **CustomerCost** to **Drop Totals**.
6. Drag **Name** to **Drop Filter Fields**.
7. Drag **Category Name** to **Drop Column Fields**.
8. Drag **ProductName** to **Drop Row Fields**.

9. Filter the **Name** field for **Buchanan, Steven**.



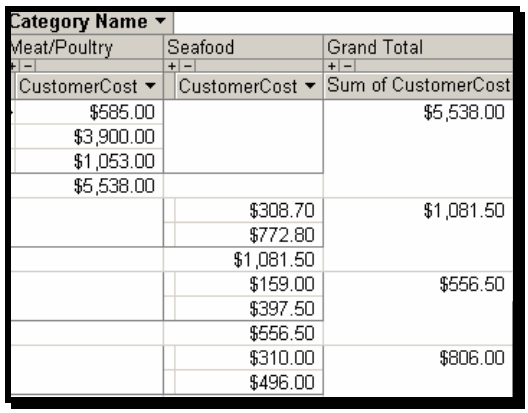
Name	Buchanan, Steven			
		Category Name		
		Meat/Poultry	Seafood	Grand Total
ProductName		CustomerCost	CustomerCost	No Totals
Alice Mutton		$585.00		
		$3,900.00		
		$1,053.00		
Boston Crab Meat			$308.70	
			$772.80	
Escargots de Bourgogne			$159.00	
			$397.50	
Ikura			$310.00	
			$496.00	
Inlagd Sill			$304.00	
Jack's New England Clam Chowder			$405.30	
Nord-Ost Matjeshering			$1,035.60	
			$776.70	
Pâté chinois		$240.00		
		$403.20		

10. Click on the (+) in the **Grand Total** column.
11. Right mouse click and select **AutoCalc ▶ Sum**.



Name	Buchanan, Steven			
		Category Name		
		Meat/Poultry	Seafood	Grand Total
ProductName		CustomerCost	CustomerCost	CustomerCost
Alice Mutton		$585.00		$585.00
		$3,900.00		$3,900.00
		$1,053.00		$1,053.00
		$5,538.00		$5,538.00
Boston Crab Meat			$308.70	$308.70
			$772.80	$772.80
			$1,081.50	$1,081.50

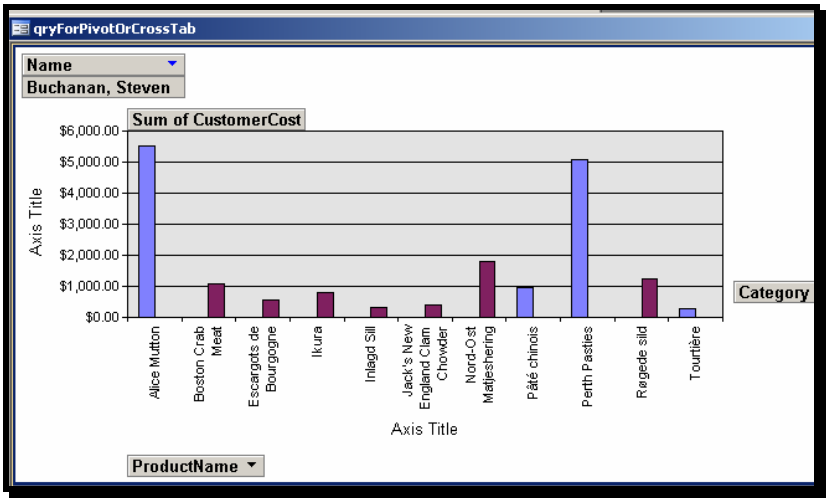
12. Click on the (-) to hide details.



Category Name		
Meat/Poultry	Seafood	Grand Total
CustomerCost	CustomerCost	Sum of CustomerCost
$585.00		$5,538.00
$3,900.00		
$1,053.00		
$5,538.00		
	$308.70	$1,081.50
	$772.80	
	$1,081.50	
	$159.00	$556.50
	$397.50	
	$556.50	
	$310.00	$806.00
	$496.00	

13. Save the form as **frmProductsPivot**.

14. Switch to **PivotChart View**.



Part Two

1. The Crosstab query was replaced by the _____ feature in Access.
2. PivotTables can be created as a _____ or a _____.
3. The area for calculations in a PivotTable is called _____ _____.
4. Selecting data from the drop down list of any section of a PivotTable is called _____.
5. The (-) in a PivotTable column indicates _____ _____.
6. When you export an Access PivotTable object to **Excel**, it is a separate _____ file.
7. The PivotTable may also be viewed as a _____.