6.11 – How to Use the DPS Pivot Tables

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Overview

A pivot table is a tool that allows users to reorganize and summarize data from a spreadsheet. Two prebuilt pivot tables are included in the DPS workbook. The DPS and AAP pivot tables summarize the FTE and Salary totals entered into the DPS and AAP tabs. The pivot table allows users to compare FTE and Salary totals to their FTE and Salary allocations before entering the changes into the CAT.

DPS Pivot

The prebuilt DPS Pivot table is designed to allow users to summarize FTE and Salary amounts entered into the DPS. Initially, the pivot table will be a summary of all data entered into the DPS but the pivot table can be modified to summarize data relevant to each user. Users can focus the results of the pivot table by changing the filters for FUND, DIVISION, PROG, PROJ ID, and DEPT.

Note: Pivot table functionality is disabled if Track Changes are enabled. To regain functionality, save a copy of the spreadsheet and follow instructions in Chapter 6.8 – Enabling and Disabling Track Changes in DPS.

Modifying the DPS Pivot Table

1. Each time you make a change to the DPS tab make sure to refresh the pivot table by clicking the refresh button "Click here to refresh Pivot".
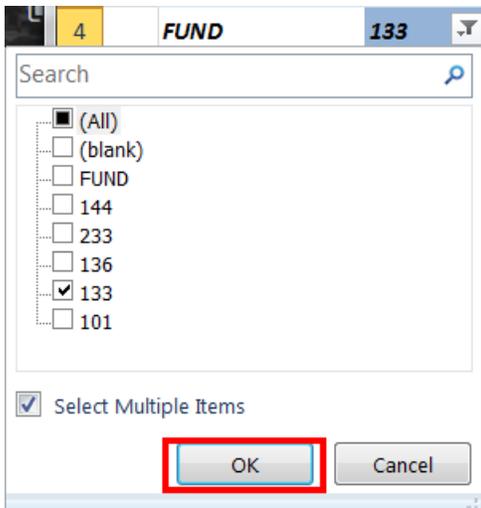
   Click here to refresh Pivot

2. The initial Pivot table results are an aggregate of all the data entered into the DPS. Filter the pivot table to summarize the data.

   a. Click on a filter symbol

	A	B	C	D
1		**DPS PIVOT**		
2				
4		*FUND*	*(All)*	
5		*DIVISION*	*(All)*	
6		*PROG*	*(All)*	
7		*PROJ ID*	*(All)*	

   b. Uncheck the boxes you wish to exclude from the pivot table summary and click OK

4	*FUND*	*133*	

   Search

   - ☑ (All)
   - ☐ (blank)
   - ☐ FUND
   - ☐ 144
   - ☐ 233
   - ☐ 136
   - ☑ 133
   - ☐ 101

   ☑ Select Multiple Items

   [OK]   [Cancel]

3. After changing filters to meet your specifications, the pivot summary row is updated to display totals based on your pivot table criteria.

   a. The pivot table below shows a summary of all data entered in the DPS spreadsheet that contains Fund 133 and is part of the Division A53.

	A	B	C	D
1		DPS PIVOT		
2				
4		FUND	133	
5		DIVISION	A53	
6		PROG	(All)	
7		PROJ ID	(All)	
8				
9		DEPT	BDGT FTE	BUDGETED SALARY
10		531200	1.600	103,192.00
11		Grand Total	1.600	103,192.00

AAP Pivot

The prebuilt AAP Pivot table is designed to allow users to summarize FTE and Salary amounts entered into the AAP tab. Initially, the pivot table will be a summary of all data entered into the AAP tab but the pivot table can be modified to summarize data relevant to each user. Users can focus the results of the pivot table by changing the filters for FUND, PROG, PROJ ID, and DEPT.

AAP PIVOT		
FUND	(All)	Filterable
PROG	(All)	Fields
PROJ ID	(All)	
DEPT	AAP FTE	AAP SALARY
A531200	1.000	$250,000.00
A531210	1.000	$ 95,000.00
A531215	0.000	$155,000.00
(blank)		
Grand Total	2.000	$500,000.00

Summary Row

Modifying the AAP Pivot Table

1. Each time you make a change to the AAP tab make sure to refresh the pivot table by clicking the refresh button "Click here to refresh Pivot".

   Click here to refresh Pivot

2. The initial Pivot table results will be an aggregate of all the data entered into the AAP. Filter the pivot table to summarize the data.

   a. Click on a filter symbol ▼

	H	I	J
		AAP PIVOT	
	FUND	(All) ▼	
	PROG	(All) ▼	
	PROJ ID	(All) ▼	

   b. Uncheck the boxes you wish to exclude from the pivot table summary and click OK
      i. Note: when you want to undo filters, simply reenter the filter and check the box next to (ALL)

   Search 🔍
   - ■ (All)
   - ☐ (blank)
   - ☐ 233
   - ☐ 101
   - ☑ 133

   ☑ Select Multiple Items

   [OK] [Cancel]
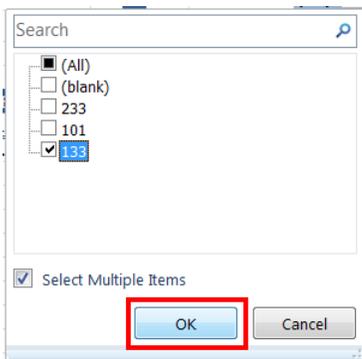
3. After changing filters to meet your specifications, the pivot summary row is to display totals based on your pivot table criteria.

   a. The pivot table below shows a summary of all data entered in the AAP tab that contains Fund 133 and all departments beginning with A5312.

	AAP PIVOT	
FUND	133 ⊤	
PROG	(All) ▼	
PROJ ID	(All) ▼	
DEPT ⊤	AAP FTE	AAP SALARY
A531200	0.000	$155,000.00
A531210	1.000	$ 95,000.00
A531215	0.000	$ 55,000.00
Grand Total	1.000	$305,000.00

Pivot Table and Budget Allocation Comparison

The summary rows from the DPS and AAP pivot tables can be combined to provide preliminary Salary and FTE budget totals. These preliminary FTE and Salary totals can be compared with budget allocations as a method for balancing budget entries.

1. Filter both pivot tables with the same parameters.
    a. In the example below, both pivot tables are displaying summary data for Fund 133 and Division A53.
2. Sum the FTE and Salary Amounts.
    a. In the example below, the FTE total is 2.6 and the Salary Total is $408,192.00.

	DPS PIVOT						AAP PIVOT		
FUND	133								
DIVISION	A53					FUND	133		
PROG	(All)					PROG	(All)		
PROJ ID	(All)					PROJ ID	(All)		
DEPT	BDGT FTE	BUDGETED SALARY				DEPT	AAP FTE	AAP SALARY	
531200	1.600	103,192.00				A531200	0.000	$155,000.00	
Grand Total	1.600	103,192.00				A531210	1.000	$ 95,000.00	
						A531215	0.000	$ 55,000.00	
						Grand Total	1.000	$305,000.00	

Total FTE - 2.6
Total Salary - $408,192.00

3. Compare preliminary totals with your budget allocation amount shown on BSUM or the Planning Allocation. If necessary, make balancing entries on the Additional Adjustments Page tab to match budged allocation.
    a. Note: This comparison only applies to the salary component of budget allocations.