Microsoft's Excel spreadsheet software includes a way to manipulate data called Pivot Tables. This provides the user an easy-to-use, intuitive, and user-friendly method for displaying quantitative data for one or more variables. RASS has locked down the functionality of the pivot tables so as to secure the data. This limits the user's ability to manipulate the pivot table data. The following are some basic tips for manipulating RASS pivot tables.

Field and Data Variables

Pivot Tables must have at least one data variable with values that it can manipulate arithmetically, e.g., sum, or count as unique values. Pivot Tables must also have at least one field variable that displays one or more values that the data can be categorized by. For instance, a Pivot Table could include a data variable with the number of Medi-Cal beneficiaries, and a field variable of "County" with values of Alameda, Contra Costa, etc.

Making a Pivot Table

A Pivot Table is created from a list or data base in Excel, Access, or some other importable data base. Each variable in this data base must have a name (in Excel, the first record). (To use a data base outside Excel, the Query software must be installed from your Microsoft Office suite.) Assuming there are at least two variables in this data base, one for a field and one for a data variable, a Pivot Table can be created by selecting Data from the Toolbar, then selecting Pivot Table Report, then following the steps presented. When a field is positioned above the Pivot Table, its Orientation is "Page." When showing as a part of the Pivot Table as a column variable, its Orientation is "Column." When displayed as a row, its Orientation is "Row."

Note that a Pivot Table carries the entire data base from which it was built even when the originating Excel data base worksheet is deleted after the Pivot Table is created. (The advantage of deleting the worksheet with the data base (not the Pivot Table) is that the size of the file is reduced substantially.)

Creating Column and Row Headings from within a Pivot Table

After the Pivot Table is built, to display the data according to the values for one of the fields, drag (by selecting and holding down the left mouse button) the field either directly above the Grand Total or directly to the left of Grand Total, then drop the field by releasing the mouse button. When the field is in the correct position for displaying as a row variable, you will see a box with a blue patch on top in the form of a landscape rectangle (a wide, short box).

To display the values for a field down the left side of the page, drag the field to the left of the Total for the data variable, and release when the box is in the form of a portrait rectangle (a narrow, tall box) with a patch of blue on the left.
Pivot Tables permit the user to nest variables, that is, to put more than one variable in the row or column position such that one field's values are categorized within each of another field's values.

Subsetting to Selected Values

Fields in the Page can be subset such that data in the Table show for only a selected value for that field. To subset, click on the small triangle pointing down in the same cell as (All) next to the PivotTable Field name, highlight the value you wish to subset by, and select ok.
Grouping Selected Values

If data for more than one value need to be displayed, that is, values must be grouped in a manner different than what is presented in the Pivot Table, several methods can be used.

1) The "Grouping" method - With the variable containing the values to be selected in either the Column or Row orientation, select one or more of the values to be grouped together (by clicking on each value while holding down the Ctrl key), then, while the cursor is still on one of the highlighted values, right-click the mouse and select Group and Outline, then Group... to re-categorize these values into a new category (which can then be renamed within the formula bar).

2) The "Hide items" method – You can hide items in the Pivot Table by dropping the field into the table (see Creating Column and Row Headings from within a Pivot Table above). Select the down arrow to the right of the field name, deselect the check box next to the items you do not wish to see data for, and select ok. Caution: You must remember when you hide values within a Pivot Table because there is nothing showing in the Pivot Table which reminds you.