

Summarizing Membership Data in the NARFE AMS

1/11/2020

by Dorothy Creswell, Chair, NARFE Configuration Advisory Board

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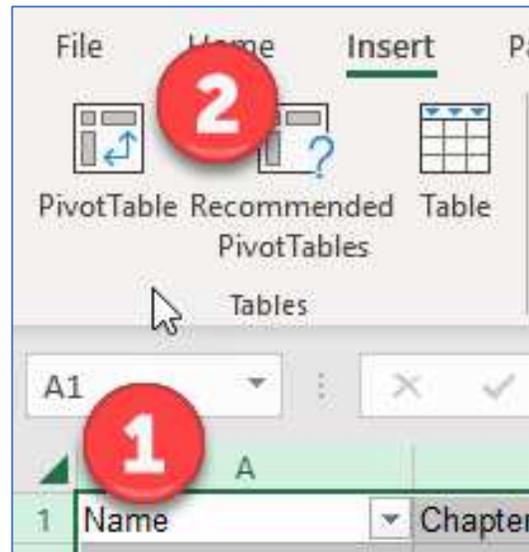
Microsoft Excel has some powerful reporting features. Pivot tables are great for summarizing data in a quick and easy fashion. Following are steps using a federation chapter membership summary as the example.

In the AMS Officer Portal, Federation Dashboard, choose the tab for Federation member list. The file is downloaded as an .XML format file. Open Excel, browse to your computer's download location, locate the file and open it. Note, on most computers you may create an association for file extensions such as .XML so that they always open in your preferred application such as Excel. On a Windows PC using File Explorer, right click on an .XML file, choose "Open with...", select Excel from the list or browse for Excel. Optionally select the box to "Always use the application to open XML files."

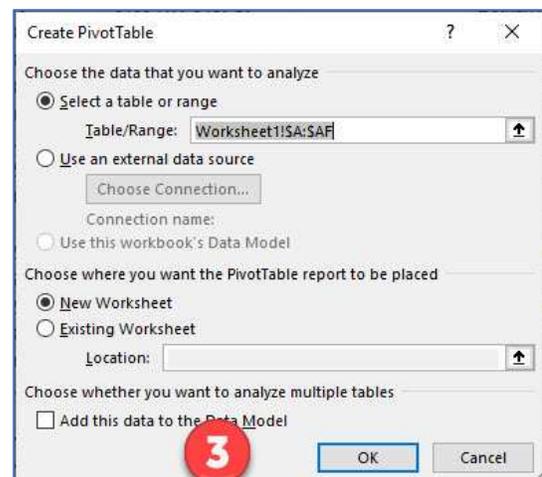
Once opened, choose File, "Save as", and chose Excel file type .XLSX. Give the file a meaningful name that might serve as a report heading and you'll save time later.

In Excel,

1. click the Select All "triangle" icon in the top left corner of the spreadsheet. It is immediately above the row numbers and to the left of the column letters.
2. On the Insert tab, in the Tables group, click "Pivot Table".



3. The Create PivotTable dialog opens (see right). Accept the defaults and click OK.



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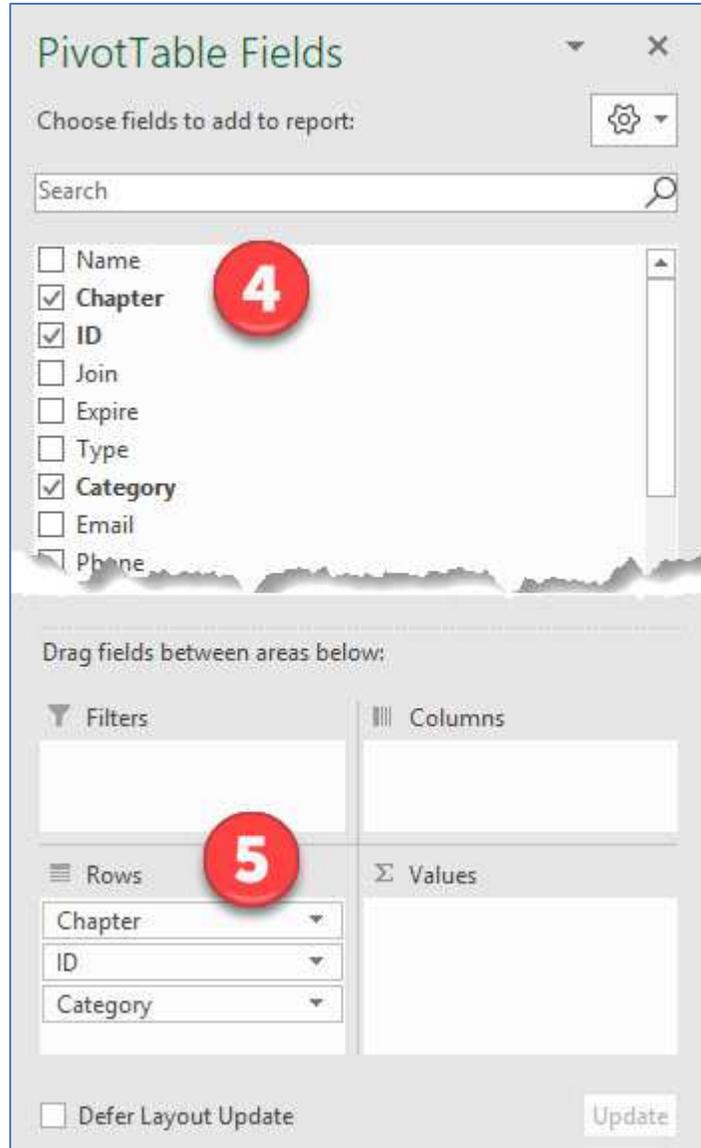
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A blank worksheet is opened with the PivotTable Fields task pane on the right.

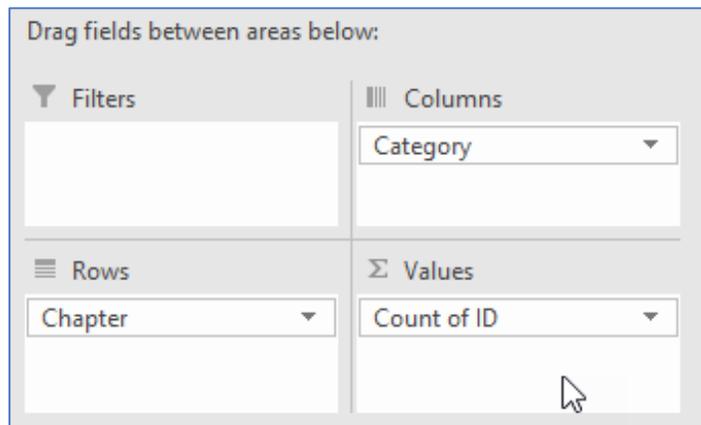
4. In the top half, there is a list of all data columns from the original Excel worksheet.

Click in the checkboxes for “Chapter”, “ID” and “Category”. Notice that each field is entered into the Rows area in the bottom half (5). On the left side of the worksheet the data values are listed (not shown).

5. Configure the table as follows:
 - a. Drag “Category” from Rows over to “Columns”.
 - b. Drag “ID” from Rows to “ Σ Values”.



The PivotFields task pane after changes are made is shown at the right.



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Shown below is the resulting table. The column labels are generated from the original worksheet data, and some are very long. You can format the header cells using the Format Cell, Alignment, “Wrap Text” option. You may also add headers and footers in the Page Layout. The row and column totals are generated automatically.

Count of ID	Column Labels	DW Monthly	First Year	Honorary Membership	Life Membership	One Year	Three Year	Two Year	(blank)	Grand Total
0091 SPARKLING		52	1	2	3	38	6	6		108
0122 DALLAS		29	3	3		26	8	5		74
0228 BLUEBONNET		64	7	5	3	43	30	15		167
0229 WACO		45			4	27	11	7		97
0274 BROWNWOOD		43	2			16	10			75
0344 ROSE CITY, TX		40	4			30	7	7		90
0509 WEATHERFORD		24	1		4	27	10	9		75
0520 MID-VALLEY		21	1			3	4	2		31
0559 MCKINNEY		11	1			12	5	4		33
0586 TEMPLE		35	5			30	14	8		156
0607 BRYAN-COLLEGE		48	1		14	23	9	8		103
0654 PARIS		5		1		5	1			12
0672 NEW BRAUNFELS		32	14	1	3	67	21	18		216
0713 AMY STUBBS		27	1		2	4	3	1		38
0778 BOEPFLE		9	1			16	7	5		38
0801 LONGVIEW		13			5	10	3	3		34
0828 GREATER N. HOUSTON		99	1		5	60	24	15		210
0862 NEW BOSTON		19			2	12	10	1		46
0941 GULF FREEWAY		22			2	6	2	4		36
0981 DALLAS-RED LICK		39	3		5	25	10	2		86
1191 BLUEBONNET, L. COUNTY		31	2		1	24	6	3		67
1201 ARLINGTON		48	3		4	45	23	22		155
1248 AMARILLO		99	1		8	18	7	10		146
1273 EPPARD-RILEY		65	1		5	50	28	15		173
1261 PERMIAN BASIN		100	2		3	38	6	3		152
1290 LAKE TEXCO		18	3		9	10	3	2		46
1320 NORTHWEST	1	88	5		32	73	42	25		279
1321 HOUSTON-NAS		52	5			41	18	9		126
1345 FANNIN COUNTY		15			1	11	3	6		36
1349 N.E. HOUSTON		15			1	8		4		29
1375 SW HOUSTON		56	1		3	53	22	15		150
1430 AUSTIN COUNTY		18	2			7	2	2		31
1454 GARLAND		20			4	18	9	3		58
1473 N.E. - EL PASO		61			2	24	9	7		108
1495 WEST EL PASO		14			2	16	5	5		42
1544 LA AMSTAD		21	1		2	6	1			31
1583 N.E. TARRANT		79	9		15	62	52	22		245
1594 SAN ANTONIO		44	11			40	11	7		125
1764 TOLEDO BENCH	1	14				7	3	1		27
2111 FREDERICKSBURG		21			1	14	4	2		47
2308 HUMBLE		17	2			15	6	4		47
2329 BOONVILLE		29			3	12	6	3		56
2385 LONE STAR		211			9	59	22	19		341
(blank)										
Grand Total		2	1933	94	123	167	1131	483	309	4242

Also note that in general use of the data, some categories are usually combined into a single column. For example, the pivot table has separate columns for “First Year” and for “One Year”; and similarly, for “Ages 81-90 Life Membership (Annual)” and “Life Membership”. A federation treasurer may want to see the individual categories broken out, while other officers may want to see the totals combined.

You may add formulas to the summary to combine the totals in this situation.

The same approach may be used with an individual chapter member list. Chapter member lists download as an Excel .XLS. When setting up the pivot table, the main change is to select “Chapter Code (Current Primary Chapter)” instead of “Chapter”. Since there will be only one chapter, there will be only one detail line.