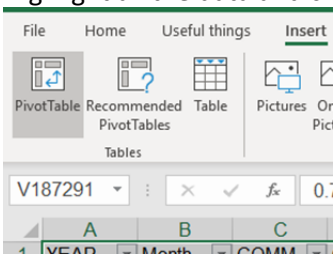
Guide to using the Individual-level CSV file to calculate sub-category Headcounts and Full-Time Equivalent (FTE)

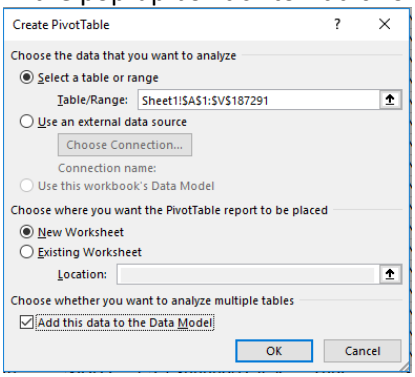
Creating the pivot table

1. Save the relevant CSV file as an Excel file

2. Highlight all the data and choose to **Insert** a **Pivot Table**



3. In the pop-up box tick to **Add this data to the Data Model** and click **OK**.



Using the above choices, the file will open up the pivot table in a new worksheet for you.

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Using the pivot table[1]

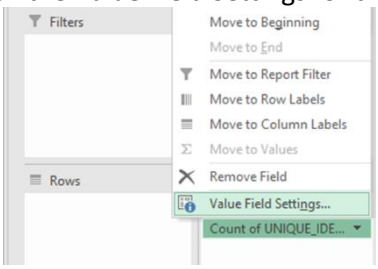
Assemble your pivot table with the fields you are interested in.
You can do this by ticking the relevant fields you want in the PivotTable Fields list, and by dragging them into the boxes below the list or into the table itself. See examples of how the Field List might look on page 4.

For **Full-Time Equivalent** choose **FTE** and check it's set to **SUM** in **Value Field Settings**.

For **Headcount** there are two approaches, depending on whether the data you are using is from March 2017 onwards **[1]** or earlier **[2]:**

[1] For data from **March 2017 onwards**:
Choose **UNIQUE_IDENTIFIER** and check it's set to **DISTINCT COUNT** in the settings.
The PivotTable will default to Count of UNIQUE_IDENTIFIER but you can change this:

1. Open the Value Field Settings for the Count of UNIQUE_IDENTIFIER



2. Scroll to the bottom of the **Summarise Values By** list, and choose **Distinct Count** and click **OK**.

This only works if you ticked **Add this data to the Data Model** when creating the pivot.

[2] For data **from September 2015 to December 2016**, additional steps are required not to overcount the GP locums, using Excel Power Pivot.

As Excel pivot tables count emptiness of a cell as a distinct category, using the method in [1] would result in an overcount of +1 for any figures including GP locums in the Sep 2015 to Dec 2016 data. To obtain exact Headcount figures, you will need to create your own Headcount measure to counteract this, using a Power Pivot option.

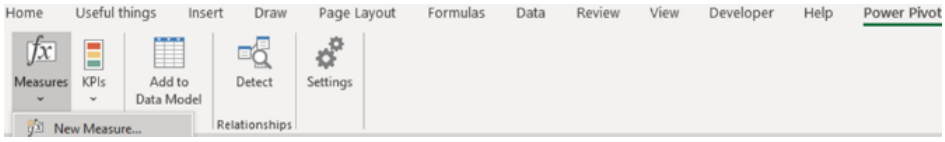
Power Pivot is available in Excel for Office 365, Excel 2019, Excel 2016 and Excel 2013 and it is also available for Excel 2010 as a free download. (See https://support.office.com/en-us/article/where-is-power-pivot-aa64e217-4b6e-410b-8337-20b87e1c2a4b for full details as there are some exceptions.)

To add it follow the steps at: https://support.office.com/en-us/article/start-the-power-pivot-add-in-for-excel-a891a66d-36e3-43fc-81e8-fc4798f39ea8?ui=en-US&rs=en-US&ad=US

When you've added Power Pivot (as above) it will show on the ribbon across the top of your Excel.

Then:

1. Go into your **Power Pivot** tab and select **New Measure**:



[1] This process will not work for Excel 2010. See page 5 for an alternative.

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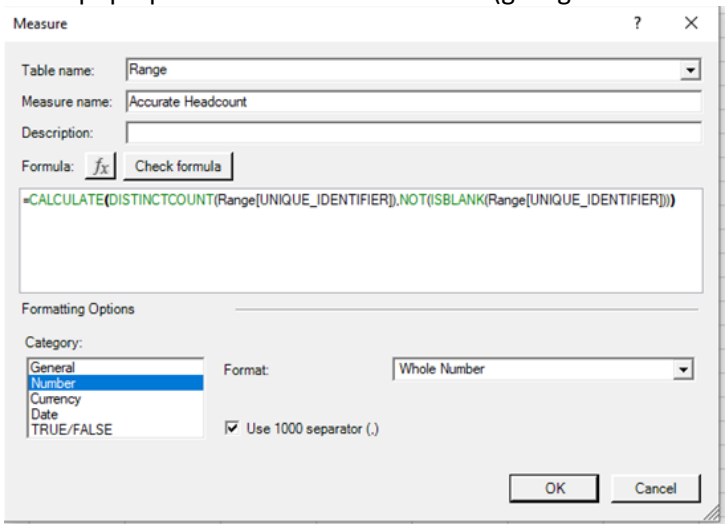
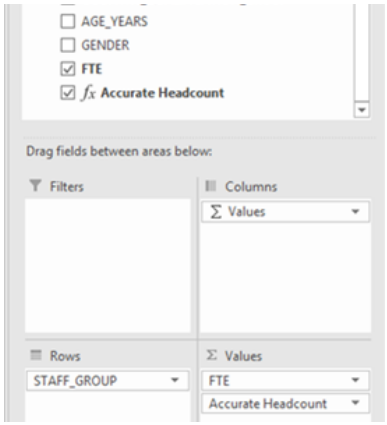
2. Fill in the pop-up box with the below details (giving it whichever **Measure Name** you prefer):



The formula you can paste in and it's:

=CALCULATE(DISTINCTCOUNT(Range[UNIQUE_IDENTIFIER]), NOT(ISBLANK(Range[UNIQUE_IDENTIFIER])))

3. Once you have clicked **OK** this measure will appear in the list of fields you can add to your Pivot Table. Use it instead of the **UNIQUE_IDENTIFIER** Distinct Count mentioned previously. You can select it and then continue using your pivot table as normal.



The table will now show you Headcount and Full-Time Equivalent (FTE) figures for your chosen breakdown.

For the same **Job Type** breakdowns as the Excel tables, choose **PUBLISHED_JOB_ROLE**.

Using **STAFF_GROUP** and **JOB_ROLE** / **PUBLISHED_JOB_ROLE** in the **Filters**, you will be able to alter the selections if you wish to identify bespoke groupings.

Where you add more than one field to the breakdown, you can choose to subtotal some or all of them, and the table will retain the correct counting for the Headcount and FTE totals.

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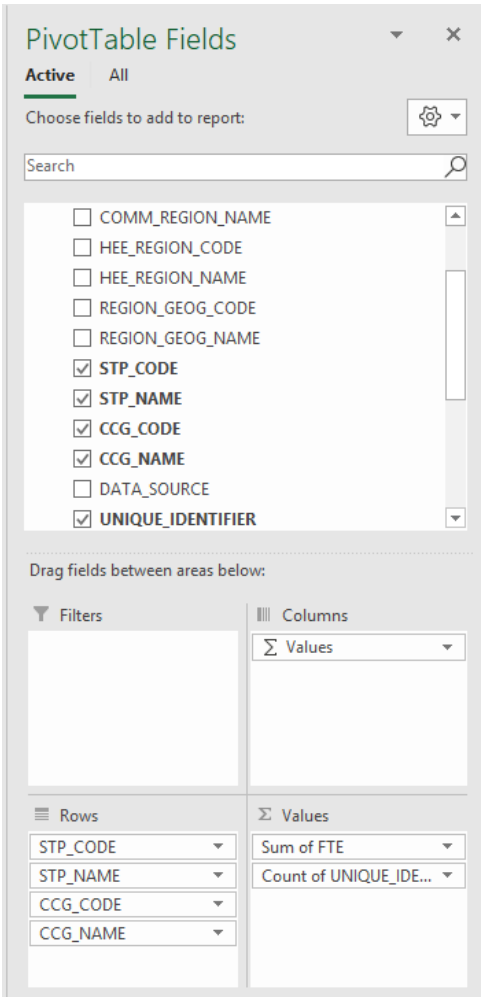
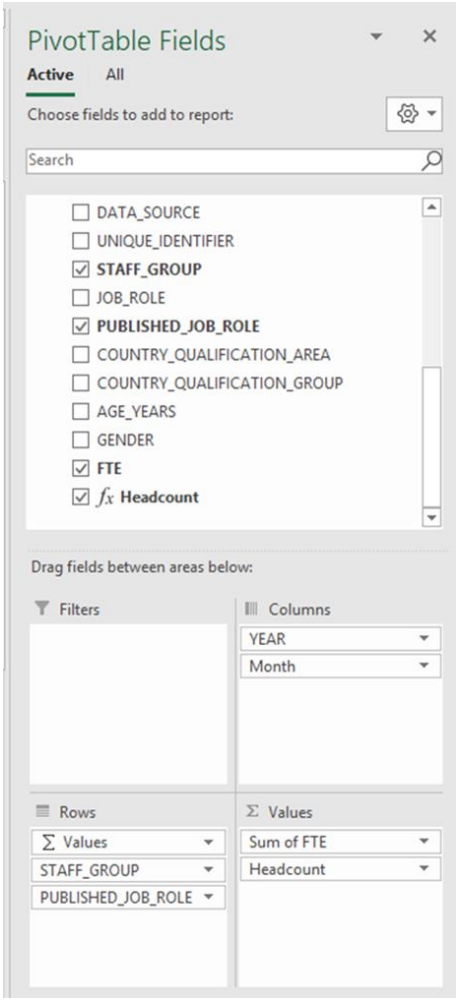
The Pivot Table field list in use

Example 1.



Example 2.



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Using the pivot table – in Excel 2010

To begin, install Power Pivot

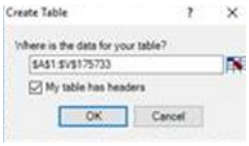
1. Close Excel (if open)
2. Download the PowerPivot Add in from here and run the installation: https://www.microsoft.com/en-us/download/details.aspx?id=43348
3. Open Excel, then go to **File** > **Options** > **Add-Ins**
4. In the Manage box, click **COM Add-ins** > **Go**
5. Check the Microsoft Office Power Pivot box, and then click OK.

   (If you have multiple Power Pivot add-in versions they will all be shown in the COM Add-ins list. Be sure to select the Power Pivot add-in for Excel.)
6. There should now be a **PowerPivot** tab on the ribbon at the top.

Then group the Individual level data

1. Save the relevant **Individual level CSV** file as an **Excel Workbook** (.xlsx)
2. Select the entire dataset and from the **PowerPivot** ribbon click **Create Linked Table**. Make sure to tick the **My table has headers** box

>



3. A new Power Pivot window will open
4. Select **PivotTable** from the Home menu

5. Create your pivot table in a new sheet
6. In the **PowerPivot Field List** right-click on the table name and select **Add New measure**

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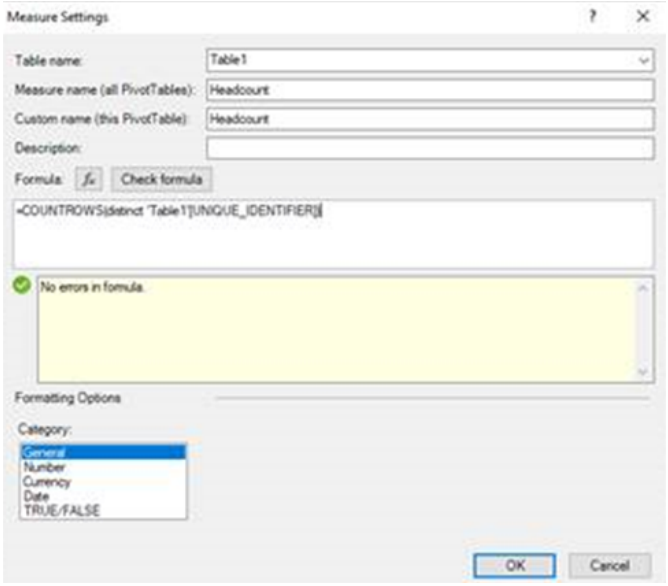
7. Then:
    a. Change Measure name to “Headcount”
    b. In the formula type

        =COUNTROWS(distinct 'Table1'[UNIQUE_IDENTIFIER])

    then click OK.

    Note: (If the table name is not Table1 you will need to replace the Table1 reference with the relevant table name).



8. This newly created field will appear at the bottom of the Field List and is ready to be used in the pivot table. The pivot table can be used to show data at any level of aggregation.

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