

## STUDY GUIDE

# UNDERSTANDING PIVOTTABLE DATA – PART II

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## Key Terms

**Grouping (PivotTables):** A tool for grouping the field in the Rows box of a PivotTable by certain categories, dates, or bins of numbers.

**Calculated Field:** A field in a PivotTable that is calculated from other aggregations within the PivotTable.

## Formula Cheat Sheet

### 1. Grouping in PivotTables

- » For any type of grouping, right click on the Rows section of the PivotTable and choose "Group."

	A	B	C	D	E	F
1						
2						
3	Row Labels	Count of start_station				
4	60	1				
5	67	1				
6	70	1				
7	74					
8	79					
9	82					
10	87					
11	89					
12	90					
13	92					
14	93					
15	94					
16	95					
17	96					
18	98					
19	100					
20	101					
21	102					
22	103					
23	105					
24	106	1				
25	108	1				
26	109	2				
27	110	2				
28	111	2				

- » **Grouping by Number:** Must be a completely numeric field (no text in the column, and Excel must recognize it as numeric). Excel will let you pick a starting value, ending value, and group size.
- » **Grouping by Date:** Must be a date field. Excel will let you pick a starting value, ending value, and method of grouping (years, months, days, etc.).
- » **Grouping by Text/Custom Groups:** Highlight the items you want to make into a group, right click and choose "Group." Click on the cell with the group title (usually defaults to "Group1"), then click in the Formula bar to rename the group. To create additional groups, continue this process (including highlighting the version of the items you are grouping that have the minus signs next to them).

## 2. Calculated Fields

- » To make a new calculated field, click inside the PivotTable. Next, click the Analyze Menu and finally the Fields, Items & Sets button. Then choose "Calculated Field..."
- » To list out existing calculated fields and their formulas in a new sheet, click inside the PivotTable. Then click the Analyze Menu and finally the Fields, Items & Sets button. Then choose "Calculated Field..."

## 3. Partial PivotTable Charts

Sometimes you may have a large PivotTable but only want to plot some of it on a chart. Excel's default is to plot the entire PivotTable. We can get around this by:

- » Clicking on a blank cell outside of the PivotTable.
- » Going to the Insert menu and selecting the type of chart you want. This should create a completely blank chart (a white box).
- » Right clicking on the blank chart and choosing "Select Data."
- » Highlighting the data you want to include for the x and y values. You can add multiple series, highlighting x and y values for each one.