Pivot Tables Cheat Sheet

@MaryJoWebster, May 2019

When to use a Pivot Table: Anytime you want to group together multiple rows of data into "groupings" to either count rows or sum the values of a column within each of those groups.

To get started…. Make sure your cursor is somewhere inside your data (not in blank columns)

Go to the **Insert menu** at the top of Excel and choose "Pivot Table"

The box that pops up confirms the table/range where your data is stored (be sure this is correct) and then leave the default to put it in a "new worksheet." Click OK.

This will bring up the designer in a new sheet (see lower left corner). You can click back to your data using those tabs.

On the upper right you'll see the "Pivot Table Fields" listing all the fields in your table. Note: If a column doesn't have a header on it, it won't show up in this list.
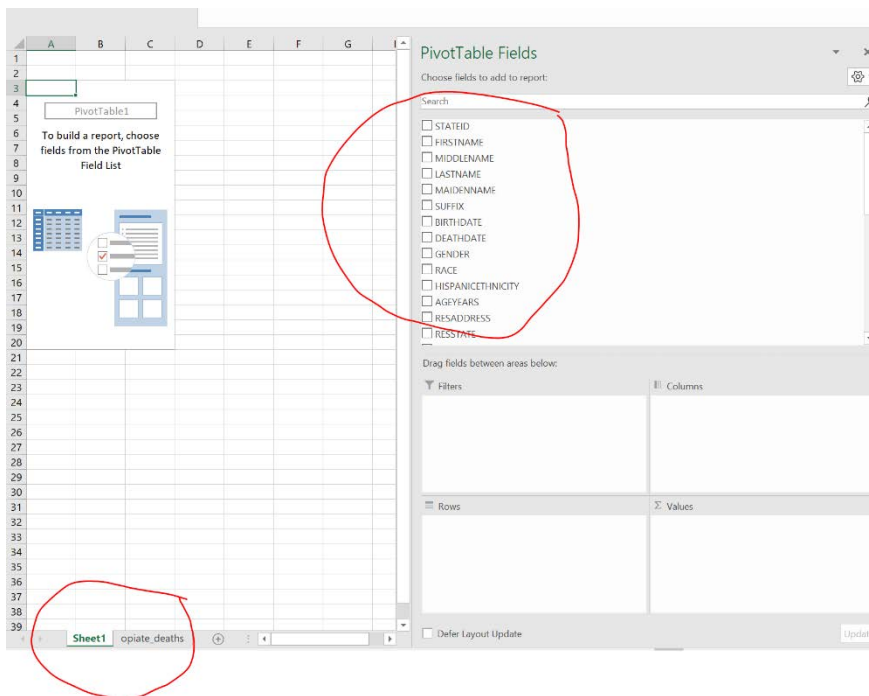
To create a new Pivot Table, drag the column from the 'Pivot table fields' list that you want to use as your "group" into the Rows box (in the lower right).

Then drag a column in the Values box. If you merely want to count the number of rows, just pick a column that you know is well populated (no blank cells).

If you want to sum values in a particular column (or get an average or a minimum or maximum), then pull down that column.
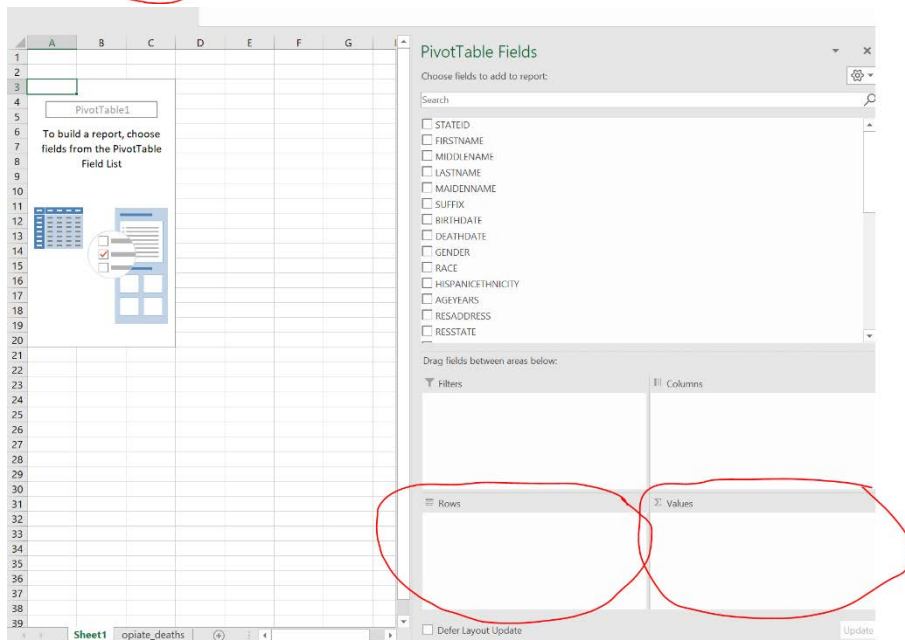
When you put a field in the Values box, click on it and it will give you an option to go to "Value Field Settings." That will bring up a box like this one that lets you do dictate whether you are counting records, summing values, calculating average, etc. (It can't do a median). Click on "Show Values As" to have it display the answers as percentages instead of raw numbers.

Also notice that I've put 2 items in the Values box in this example. You can do as many calculations as you'd like.
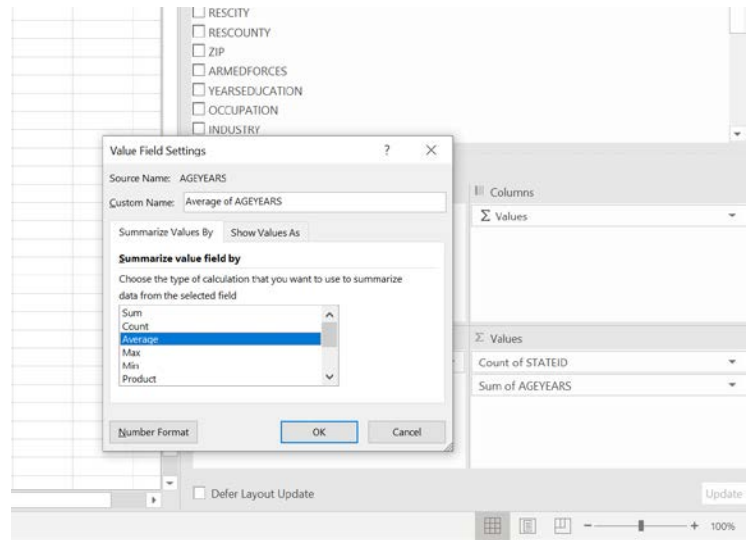
Use the Filter box to limit which data from your worksheet the Pivot Table uses. Once you put a field in the Filter box, it will add a filter pull-down menu above your results. There you can select one or more items from the list. Here I've limited my results to only those where the gender field said "F" for female.
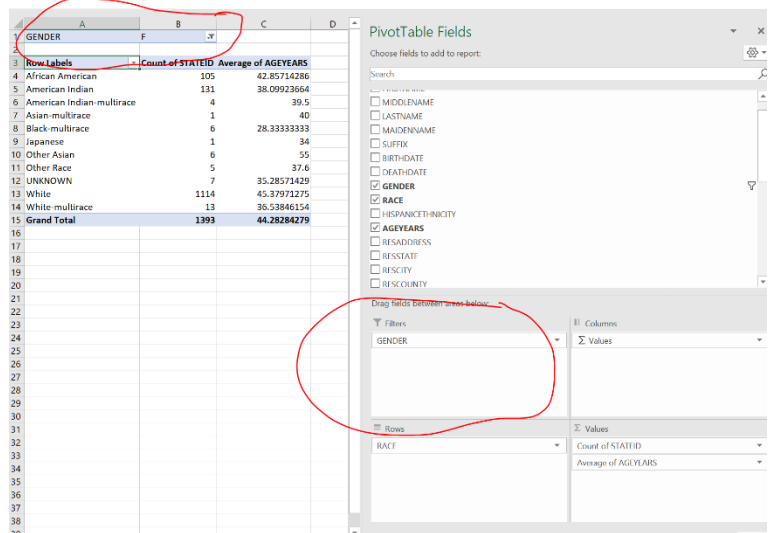
Use the Columns box to create a "cross tabulation." In this case I want to show the number of people by both race and gender. So race is in my Row box and gender is in the Columns box.