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## Create and modify tables


### Table references


## Managing large workbooks


## Visualizing data with basic charts


## Analyzing data


 **Video:** Create a PivotTable  
6 min

 **Video:** Summarize data in a PivotTable  
5 min

 **Reading:** Summary of DAX categories of functions  
10 min

 **Reading:** Exercise:  
Creating PivotTables  
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 **Video:** Filtering data using slicers  
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 **Reading:** Exercise: Filtering data using slicers

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## Exercise: Creating PivotTables

**Note:** You can pass this course and all graded assessments without access to the downloadable version of Excel.

### How to complete this exercise

To complete this exercise, you will need access to Microsoft 365 Excel.

**Note:** Keep in mind that if you are using free Office for the web or another version of the Microsoft 365 Excel application some features covered in this exercise may not be available.

### Free Office for the web

If you do not have access to Microsoft 365 Excel, you can use Free Office for the web. This version of Office allows you to view and edit files in apps like Word, Excel, and PowerPoint. This free service is available to anyone with a Microsoft account.

### Access Microsoft Account

[Log in to your Microsoft account.](#)  Type the email, phone number, or Skype sign-in that you use for other services (Outlook, Office, etc.), then select Next. If you don't have a Microsoft account, you can select No account? Create one!

## Let's get started!

You have been given the raw transactional data for the daily sales numbers of your sales staff. To determine the total sales numbers for each sales associate, you would like to create a PivotTable using this data.

1. Click on the link below to open the Microsoft Excel exercise document you can use to complete this exercise.

[Exercise: Creating PivotTables](#) 

2. Use your cursor to select cells **A4:E40**:

**AutoSave** | **File** | **Home** | **Insert** | **Page Layout** | **Formulas** | **Data** | **Review** | **View** | **Help**

**Clipboard** | **Font** | **Alignment** | **Number**

**Calibri** | **11** | **A<sup>\*</sup>** | **Wrap Text** | **General** | **\$ % ‰ ° ±**

**B I U** | **Color** | **Background Color** | **Conditional Formatting** | **Format Table**

**First Name**

	A	B	C	D	E	F	G	H	I	J	K
12	Stanley	Prestwick	Stanley_Prestwick	\$ 2,346.87	\$ -						
13	Jerry	Harrison	Jerry_Harrison	\$ 1,687.00	\$ -						
14	Leah	Thompson	Leah_Thompson	\$ 9,874.45	\$ 50.00						
15	Jackie	Williamson	Jackie_Williamson	\$ 8,773.68	\$ 50.00						
16	Lucas	Bressan	Lucas_Bressan	\$ 7,835.87	\$ 50.00						
17	Stanley	Prestwick	Stanley_Prestwick	\$ 6,898.05	\$ 50.00						
18	Jerry	Harrison	Jerry_Harrison	\$ 5,960.23	\$ 50.00						
19	Leah	Thompson	Leah_Thompson	\$ 5,022.41	\$ 50.00						
20	Jackie	Williamson	Jackie_Williamson	\$ 4,084.59	\$ 50.00						
21	Lucas	Bressan	Lucas_Bressan	\$ 3,146.77	\$ 50.00						
22	Stanley	Prestwick	Stanley_Prestwick	\$ 2,208.96	\$ -						
23	Jerry	Harrison	Jerry_Harrison	\$ 1,271.14	\$ -						
24	Leah	Thompson	Leah_Thompson	\$ 333.32	\$ -						
25	Jackie	Williamson	Jackie_Williamson	\$ 5,022.41	\$ 50.00						
26	Lucas	Bressan	Lucas_Bressan	\$ 4,084.59	\$ 50.00						
27	Stanley	Prestwick	Stanley_Prestwick	\$ 3,146.77	\$ 50.00						
28	Jerry	Harrison	Jerry_Harrison	\$ 2,208.96	\$ -						
29	Leah	Thompson	Leah_Thompson	\$ 1,271.14	\$ -						
30	Jackie	Williamson	Jackie_Williamson	\$ 7,478.96	\$ 50.00						
31	Lucas	Bressan	Lucas_Bressan	\$ 1,689.47	\$ -						
32	Stanley	Prestwick	Stanley_Prestwick	\$ 5,478.45	\$ 50.00						
33	Jerry	Harrison	Jerry_Harrison	\$ 7,600.00	\$ 50.00						
34	Leah	Thompson	Leah_Thompson	\$ 6,599.75	\$ 50.00						
35	Jackie	Williamson	Jackie_Williamson	\$ 7,014.96	\$ 50.00						
36	Lucas	Bressan	Lucas_Bressan	\$ 7,430.17	\$ 50.00						
37	Stanley	Prestwick	Stanley_Prestwick	\$ 7,845.38	\$ 50.00						
38	Jerry	Harrison	Jerry_Harrison	\$ 8,260.59	\$ 50.00						
39	Leah	Thompson	Leah_Thompson	\$ 8,675.80	\$ 50.00						
40	Jackie	Williamson	Jackie_Williamson	\$ 9,091.01	\$ 50.00						
41											
42											

**Sheet1** | **3TR x 5C**

3. Next, click **Insert, PivotTable**, then **From Table/Range**.

File Home Insert Draw Layout Formulas Data Review View Automate Help

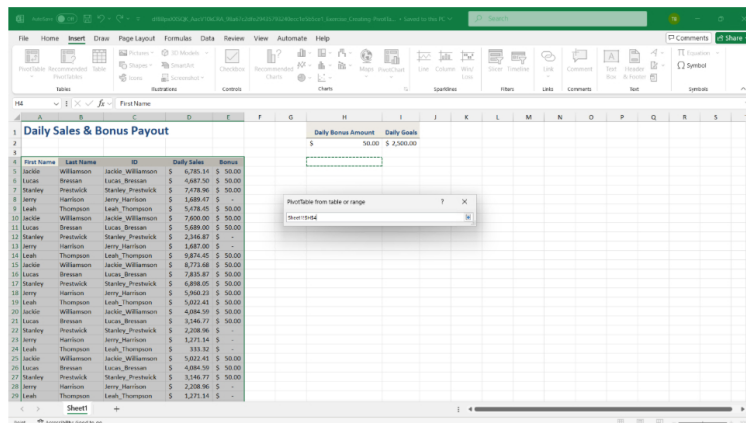
<

4. The Create PivotTable dialog box is now displayed. The data range that you previously selected is shown within the Table/Range text box:

5. You want this new PivotTable to be inserted into the current worksheet, so click the **Existing Worksheet** radio button:

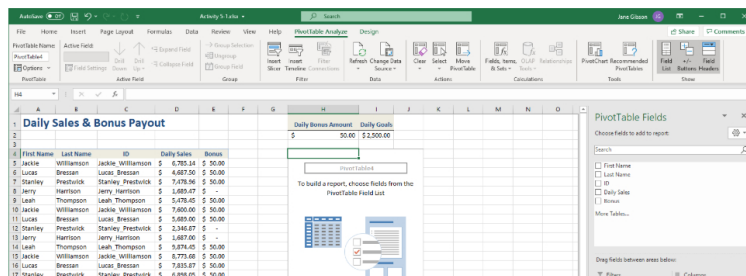
6. Inside the **Location** text box, click the **range picker** button:

7. Use your cursor to select cell **H4**:



8. Press **Enter** to apply the new location. Back at the Create PivotTable dialog box, click **OK** to apply the new settings:

9. The PivotTable is now added to the current worksheet in the location that you previously set:



19	Jerry	Harrison	Jerry Harrison	\$	5,960.23	\$	50.00
20	Leah	Thompson	Leah Thompson	\$	5,622.41	\$	50.00
21	Jackie	Williamson	Jackie Williamson	\$	4,684.59	\$	50.00
22	Luke	Bressan	Luke Bressan	\$	3,145.77	\$	50.00
23	Stanley	Prestwick	Stanley Prestwick	\$	2,260.46	\$	50.00
24	Jerry	Harrison	Jerry Harrison	\$	1,271.14	\$	-
25	Leah	Thompson	Leah Thompson	\$	133.52	\$	-
26	Jackie	Williamson	Jackie Williamson	\$	5,622.41	\$	50.00
27	Luke	Bressan	Luke Bressan	\$	4,684.59	\$	50.00
28	Stanley	Prestwick	Stanley Prestwick	\$	3,145.77	\$	50.00

10. In the Pivot Table Fields task pane, click the **Last Name**, **Daily Sales** and **Bonus** field checkboxes:

PivotTable Fields

Choose fields to add to report:

Search

☐ First Name

☒ **Last Name**

☐ ID

☒ **Daily Sales**

☒ **Bonus**

More Tables...

11. You will see that the daily sales and bonuses have been summarized by Sales Representative:

Row Labels	Sum of Daily Sales	Sum of Bonus
Bressan	34563.36536	300
Harrison	28677.37555	150
Prestwick	35403.43045	250
Thompson	37255.30564	250
Williamson	55850.74527	400
<b>Grand Total</b>	<b>191750.2223</b>	<b>1350</b>

12. To improve the number formatting, click the **Sum of Daily Sales** drop-down arrow in the Values area and select **Value Field Settings**:

Drag fields between areas below:

Filters

Columns

Σ Values

Rows

Last Name

Σ Values

Sum of Daily Sales

Move Up

Move Down

Move to Beginning

Move to End

Move to Report Filter

Move to Row Labels

Move to Column Labels

Move to Values

Remove Field

Value Field Settings...

13. Now click **Number Format**:

Value Field Settings

Source Name: Daily Sales

Custom Name: Sum of Daily Sales

Summarize Values By

Show Values As

Summarize value field by

Choose the type of calculation that you want to use to summarize data from the selected field

Sum

Count

Average

Max

Min

Product

Number Format

OK

Cancel

14. In the Format Cells dialog box, click **Currency**, then click **OK**:

Format Cells

Number

Category:

General

Number

Currency

Accounting

Date

Time

Percentage

Fraction

Scientific

Text

Special

Custom

Sample

Row Labels

Decimal places: 2

Symbol: \$

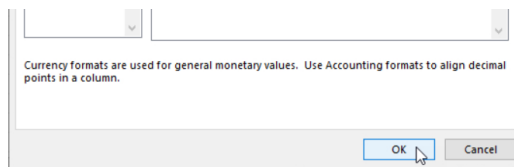
Negative numbers:

-\$1,234.10

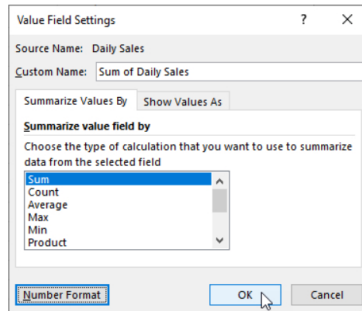
\$1,234.10

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15. Click **OK** in the Value Field Settings dialog box:



16. Repeat the steps for the **Bonus** column. Once complete, the daily sales and bonus values should be formatted correctly:

Row Labels	Sum of Daily Sales	Sum of Bonus
Bressan	\$34,563.37	\$300.00
Harrison	\$28,677.38	\$150.00
Prestwick	\$35,403.43	\$250.00
Thompson	\$37,255.31	\$250.00
Williamson	\$55,850.75	\$400.00
<b>Grand Total</b>	<b>\$191,750.22</b>	<b>\$1,350.00</b>

17. Save the current workbook as Activity 5-1 Complete and then close Microsoft 365 Excel to complete this exercise.

18. Now, you can check out an example of a completed document in the link below:

[Creating exercise: Creating PivotTables](#) [↗](#)

Mark as completed

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