

# HOW TO PIVOT DATA IN TABLEAU DESKTOP

There are some instances or use cases when it is tougher to analyze the data that is stored in a crosstab format in Tableau.

When working with Microsoft Excel, text file, Google Sheets, and .pdf data sources, we can pivot the data from crosstab format into columnar format. Pivoting data is the technique of data shaping that rotates data from a state of rows to a state of columns. Simply put as the process of converting data from crosstab format (which can be difficult to work with) to columnar format.

Pivoting data is ideally suited for handling multiple response questions (similar data present across separate fields) and crosstab data

We can access the option by clicking the drop-down arrow next any one of the column names required to be pivoted, Select **Pivot**

**NOTE:** While working with other data sources, we can Pivot using custom SQL (Tableau Desktop)

# HOW TO PIVOT DATA IN TABLEAU DESKTOP

**STEP 1:** Open the required file and drag the table to **Canvas** of the **Data Source** page

The screenshot shows the Tableau Desktop interface on the 'Data Source' page. The left sidebar contains the 'Connections' pane with 'Data\_for\_Pivot' (Microsoft Excel) selected, and the 'Sheets' pane with 'Pivot' selected. The main canvas displays a pivot table titled 'Pivot (Data\_for\_Pivot)'. The table has 4 fields and 17 rows. The fields are: Year, Sachin, Virat, and Sehwag. The data is as follows:

Year	Sachin	Virat	Sehwag
2000	100	34	56
2001	43	22	11
2002	100	34	56
2003	100	34	56
2004	100	34	56
2005	43	22	11

The bottom of the interface shows the 'Data Source' tab and the 'Sheet 1' tab.

# HOW TO PIVOT DATA IN TABLEAU DESKTOP

**STEP 2:** Select the required columns on which we need to perform the Pivot  
Ensure to keep the Ctrl (or Cmd in Mac) key pressed  
Click the drop-down arrow next to any of the column names,  
and then select **Pivot**.

Pivot (Data\_for\_Pivot)

Connection: ☒ Live ☐ Extract

Filters: 0 | [Add](#)

Pivot

Need more data?  
Drag tables here to relate them. [Learn more](#)

Pivot 4 fields 17 rows 17 rows

Pivot	Pivot	Pivot	Pivot
Year	Sachin	Virat	Sehwag
2000	100	34	56
2001	43	22	11
2002	100	34	56
2003	100	34	56
2004	100	34	56
2005	43	22	11

Table Details

- Rename
- Copy Values
- Hide
- Create Calculated Field...
- Pivot
- Merge Mismatched Fields

# HOW TO PIVOT DATA IN TABLEAU DESKTOP

**STEP 3:** New columns called **Pivot field names** and **Pivot field values** are created and added to the data source

Pivot (Data\_for\_Pivot)

Connection

Live

Extract

Filters

0 | [Add](#)

Pivot



Need more data?

Drag tables here to relate them. [Learn more](#)

Pivot

3 fields 51 rows

51 → rows ⚙️

Table Details	#	Abc	#	
	Pivot	Pivot1	Pivot1	
	Year	Pivot Field Names	Pivot Field Values	
	2000	Sachin	100	
	2000	Sehwag	56	
	2000	Virat	34	
	2001	Sachin	43	
	2001	Sehwag	11	
	2001	Virat	22	

# HOW TO PIVOT DATA IN TABLEAU DESKTOP

**STEP 4:** We can change the names of the new columns. Click the drop-down arrow next of the column names, and then select **Rename**. Change the name as required

Pivot (Data\_for\_Pivot)

Connection: ☒ Live ☐ Extract Filters: 0 | Add

Pivot

Need more data?  
Drag tables here to relate them. [Learn more](#)

Remove Pivot  
Merge Mismatched Fields

51 rows

Year	Pivot1 Pivot Field Names	Pivot1 Pivot Field Values
2000	Sachin	100
2000	Sehwag	56
2000	Virat	34
2001	Sachin	43
2001	Sehwag	11
2001	Virat	22

Pivot (Data\_for\_Pivot)

Connection: ☒ Live ☐ Extract Filters: 0 | Add

Pivot

Need more data?  
Drag tables here to relate them. [Learn more](#)

3 fields 51 rows

Year	Pivot1 Player Name	Pivot1 Pivot Field Values
2000	Sachin	100
2000	Sehwag	56
2000	Virat	34
2001	Sachin	43
2001	Sehwag	11
2001	Virat	22

Pivot (Data\_for\_Pivot)

Connection: ☒ Live ☐ Extract Filters: 0 | Add

Pivot

Need more data?  
Drag tables here to relate them. [Learn more](#)

Pivot

3 fields 51 rows

Year	Pivot1 Player Name	Pivot1 Runs
2000	Sachin	100
2000	Sehwag	56
2000	Virat	34
2001	Sachin	43
2001	Sehwag	11
2001	Virat	22

# HOW TO PIVOT DATA IN TABLEAU DESKTOP

**STEP 5:** After pivoting the data we can easily build the view to further analyze the data as per requirement



The image shows the Tableau Desktop interface. On the left, the 'Marks' shelf contains 'SUM(Runs)'. The 'Columns' shelf contains 'Year' and the 'Rows' shelf contains 'Player Name'. The main view, 'Sheet 1', displays a pivot table with 'Player Name' on the vertical axis and 'Year' on the horizontal axis. The data is summarized for three players: Sachin, Sehwag, and Virat, across the years 2000 to 2016.

Player Name	Year																
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Sachin	100	43	100	100	100	43	100	100	100	100	100	100	43	100	100	43	100
Sehwag	56	11	56	56	56	11	56	56	56	56	56	56	11	56	56	11	56
Virat	34	22	34	34	34	22	34	34	34	34	34	34	22	34	34	22	34