

Working with Pivot Tables

An Introduction to Pivot Table

- When we have lot of data, it can sometimes be difficult to analyze all of the information in the worksheet.
- **PivotTables** can help make your worksheets more manageable by **summarizing** data and will allow to **manipulate** it in different ways
- One of the best things about PivotTables is that they can quickly **pivot**—or reorganize—data, allowing to look at the worksheet data in different ways. Pivoting data can help you answer **different questions** and even **experiment** with the data to discover new trends and patterns.

Using PivotTables to answer questions

- Consider worksheet consists of four fields: Sales Person, Region, account , Order Amount and Month.
- What is the amount sold by each salesperson?
- Answering this question could be time consuming and difficult—each salesperson appears on multiple rows, and we would need to total all of their different orders individually.
- PivotTable can instantly calculate and summarize the data in a way that's both easy to read and manipulate.

	A	B	C	D	E	F
1	Salesperson	Region	Account	Order Amount	Month	
2	Albertson, Kathy	East	29386	\$925.00	January	
3	Albertson, Kathy	East	74830	\$875.00	February	
4	Albertson, Kathy	East	90099	\$500.00	February	
5	Albertson, Kathy	East	74830	\$350.00	March	
6	Brennan, Michael	West	82853	\$400.00	January	
7	Brennan, Michael	West	72949	\$850.00	January	
8	Brennan, Michael	West	90044	\$1,500.00	January	
9	Brennan, Michael	West	82853	\$550.00	February	
10	Brennan, Michael	West	72949	\$400.00	March	
11	Davis, William	South	55223	\$235.00	February	
12	Davis, William	South	10354	\$850.00	January	
13	Davis, William	South	50192	\$600.00	March	
14	Davis, William	South	27589	\$250.00	January	
15	Dumlao, Richard	West	67275	\$400.00	January	

Total amount sold by each salesperson

Row Labels	Sum of Order Amount
Albertson, Kathy	\$2,650.00
Brennan, Michael	\$3,700.00
Davis, William	\$1,935.00
Dumlao, Richard	\$1,490.00
Flores, Tia	\$4,565.00
Post, Melissa	\$1,690.00
Thompson, Shannon	\$3,160.00
Walters, Chris	\$4,375.00
Grand Total	\$23,565.00

Once a PivotTable is created, we can use it to answer different questions by rearranging—or pivoting—the data.

For example, we can answer the question: What is the total amount sold in each month?

we can modify the PivotTable to look like this:

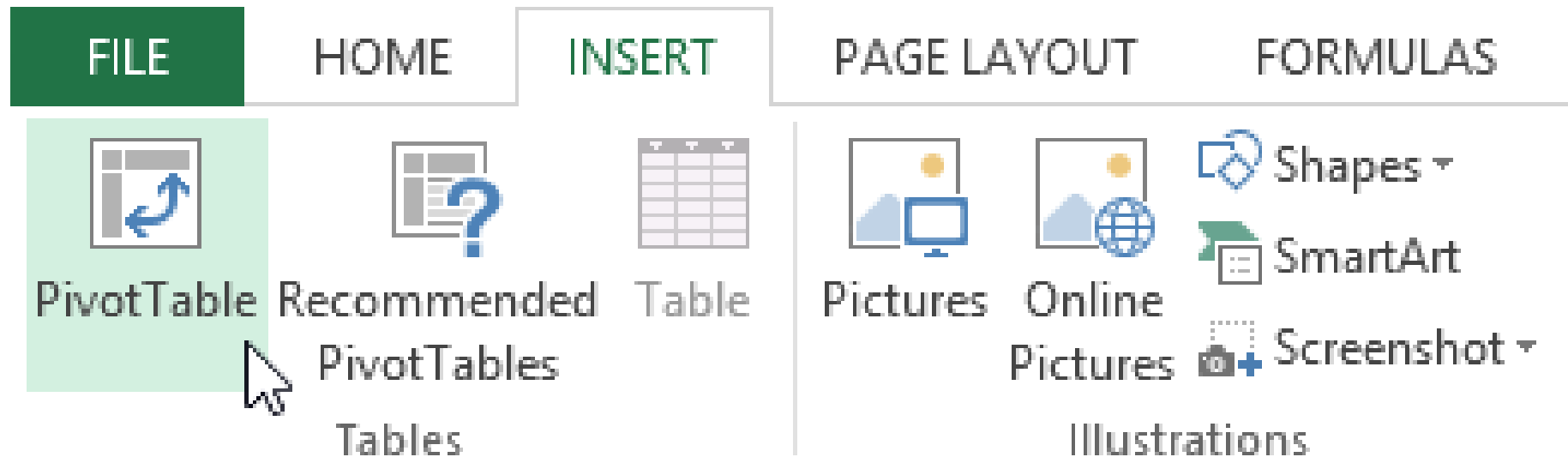
Row Labels ▾	Sum of Order Amount
January	\$9,090.00
February	\$9,160.00
March	\$5,315.00
Grand Total	\$23,565.00

To create a PivotTable:

Step1: Select the **table** or **cells** (including column headers) containing the data you want to use.

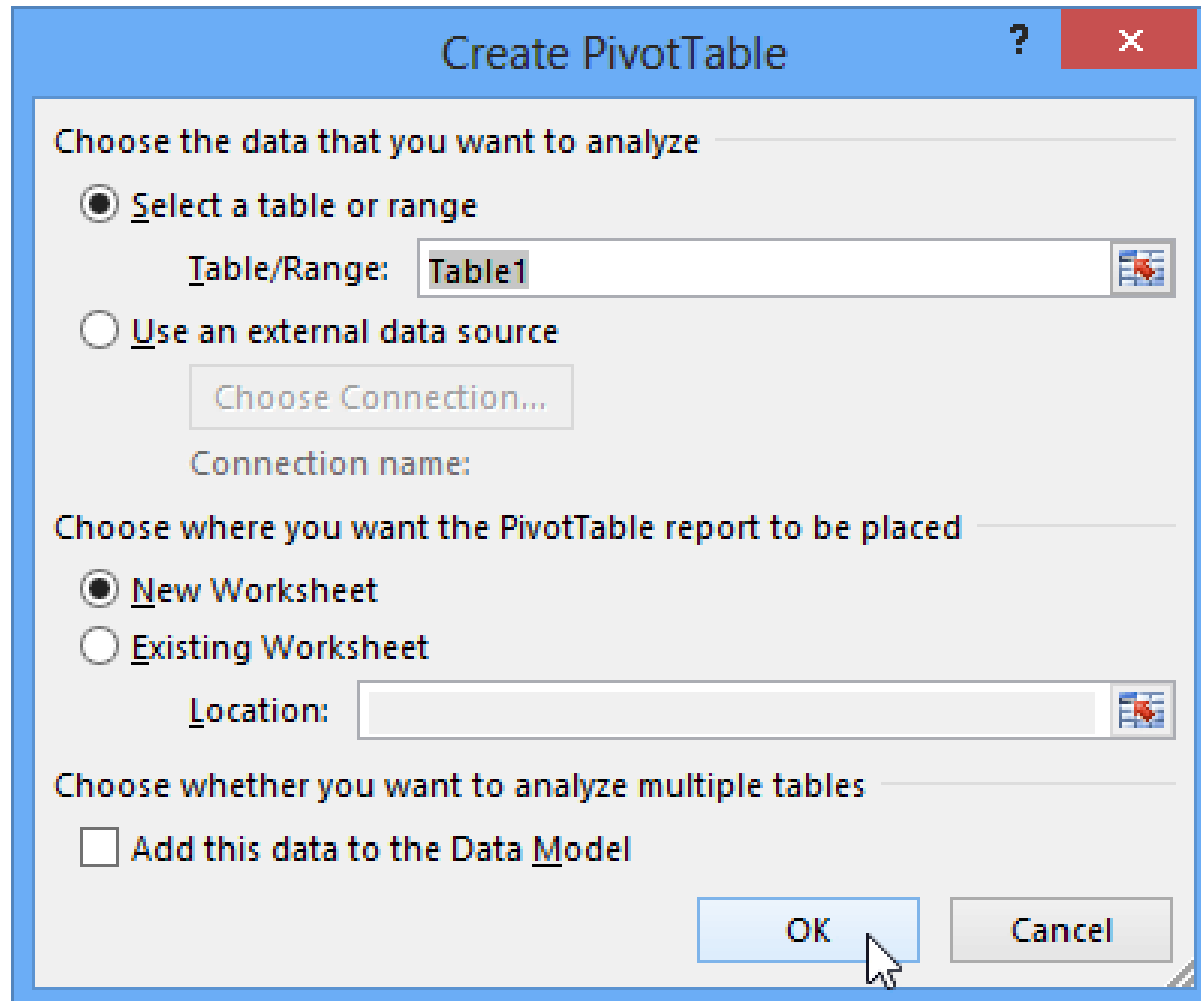
	A	B	C	D	E	F
1	Salesperson	Region	Account	Order Amount	Month	
2	Albertson, Kathy	East	29386	\$925.00	January	
3	Albertson, Kathy	East	74830	\$875.00	February	
4	Albertson, Kathy	East	90099	\$500.00	February	
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14	Davis, William	South	27589	\$250.00	January	
15	Dumlao, Richard	West	67275	\$400.00	January	

Step2: From the **Insert** tab, click the **PivotTable** command.

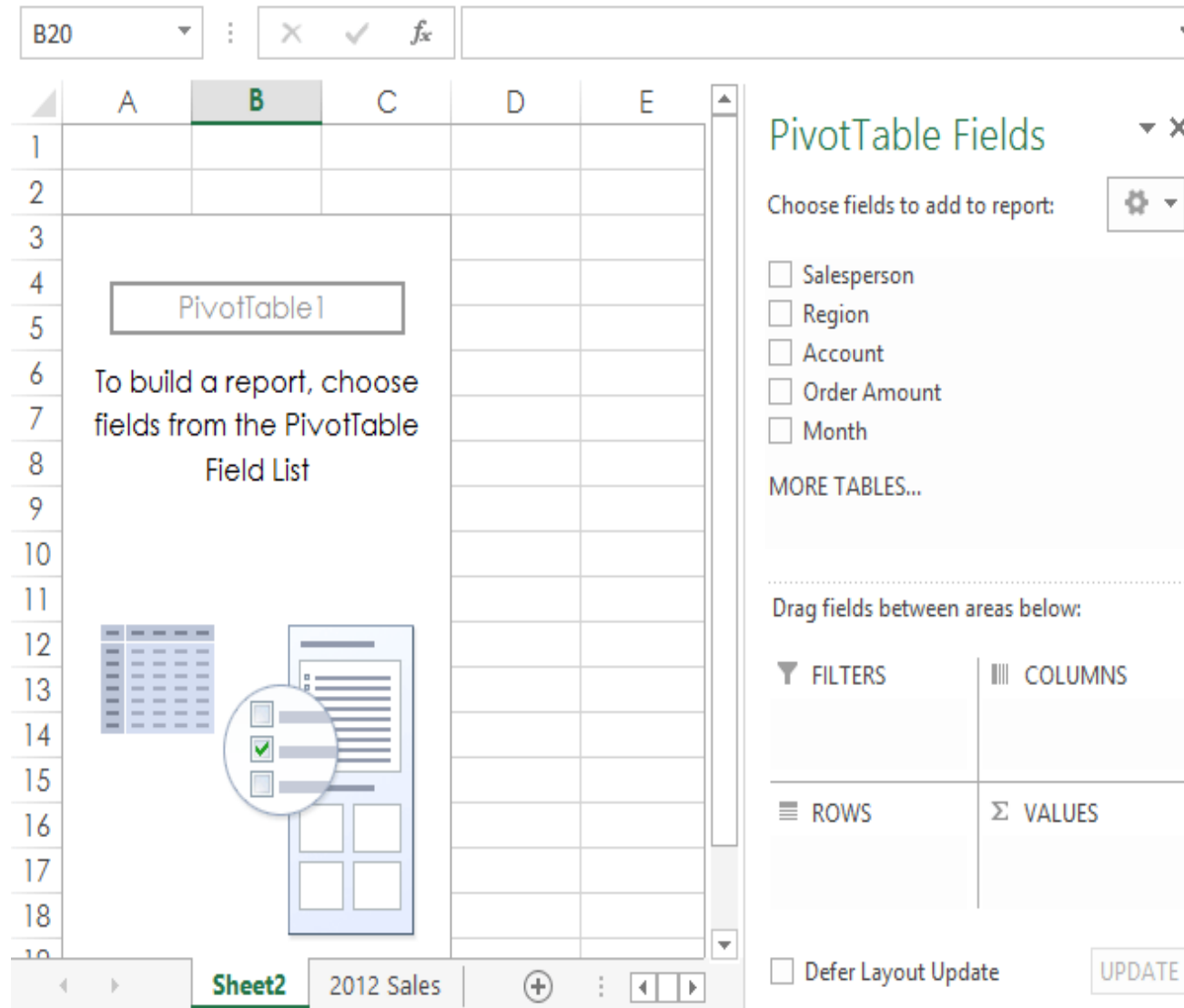


Step3:

The **Create PivotTable** dialog box will appear. Choose your settings, then click **OK**. In our example, we'll use **Table1** as our source data and place the PivotTable on a **new worksheet**.



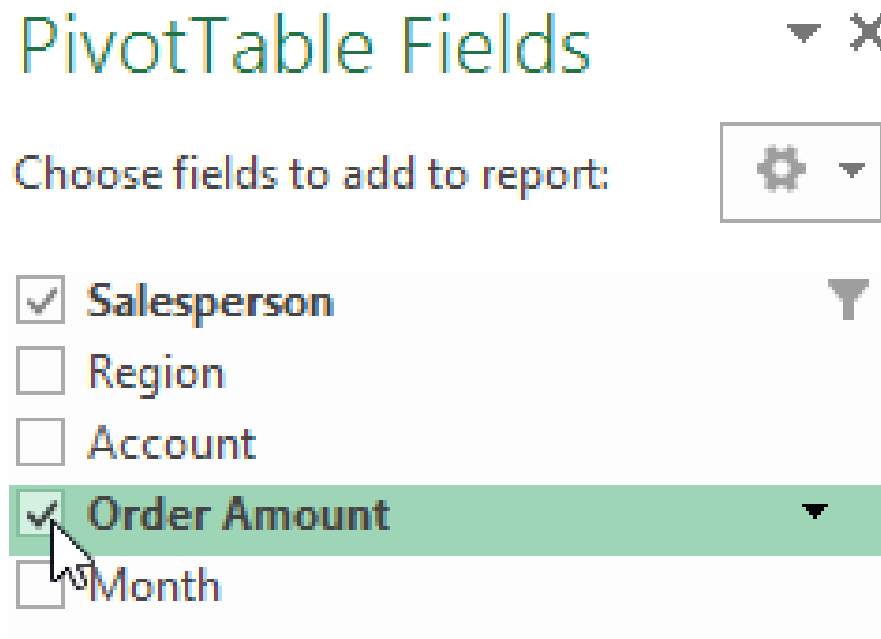
A blank **PivotTable** and **Field List** will appear on a new worksheet.



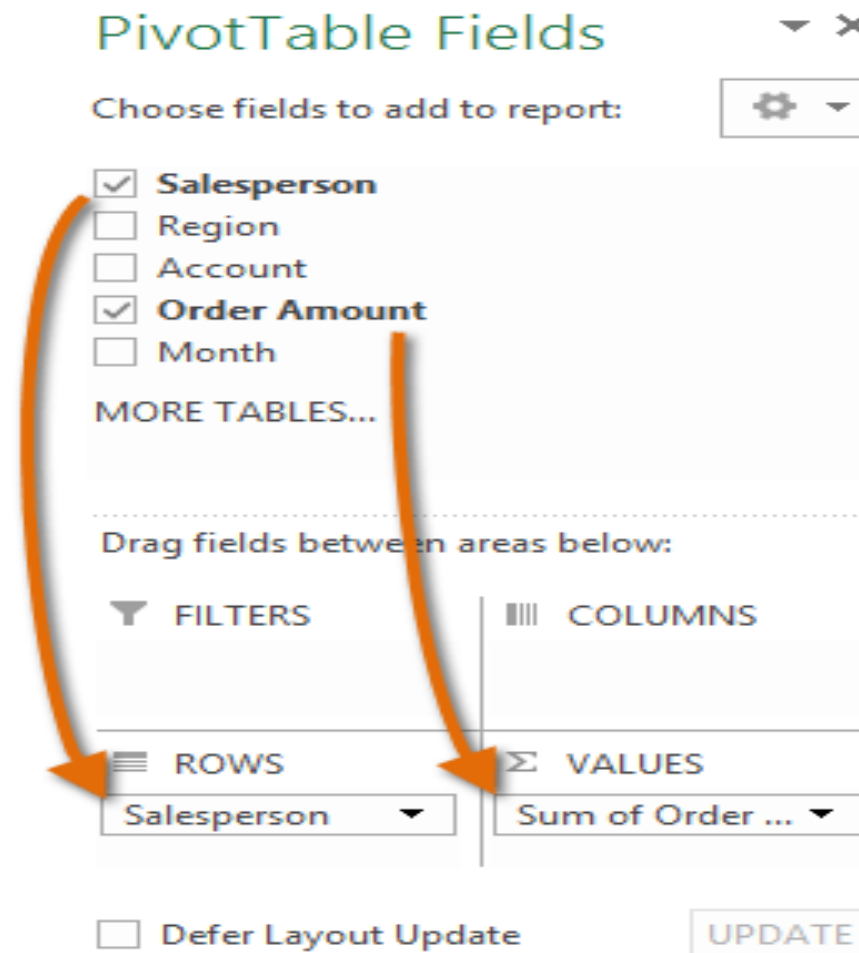
Step4: Once you create a PivotTable, you'll need to decide which **fields** to add.

Field is simply a **column header** from the source data.

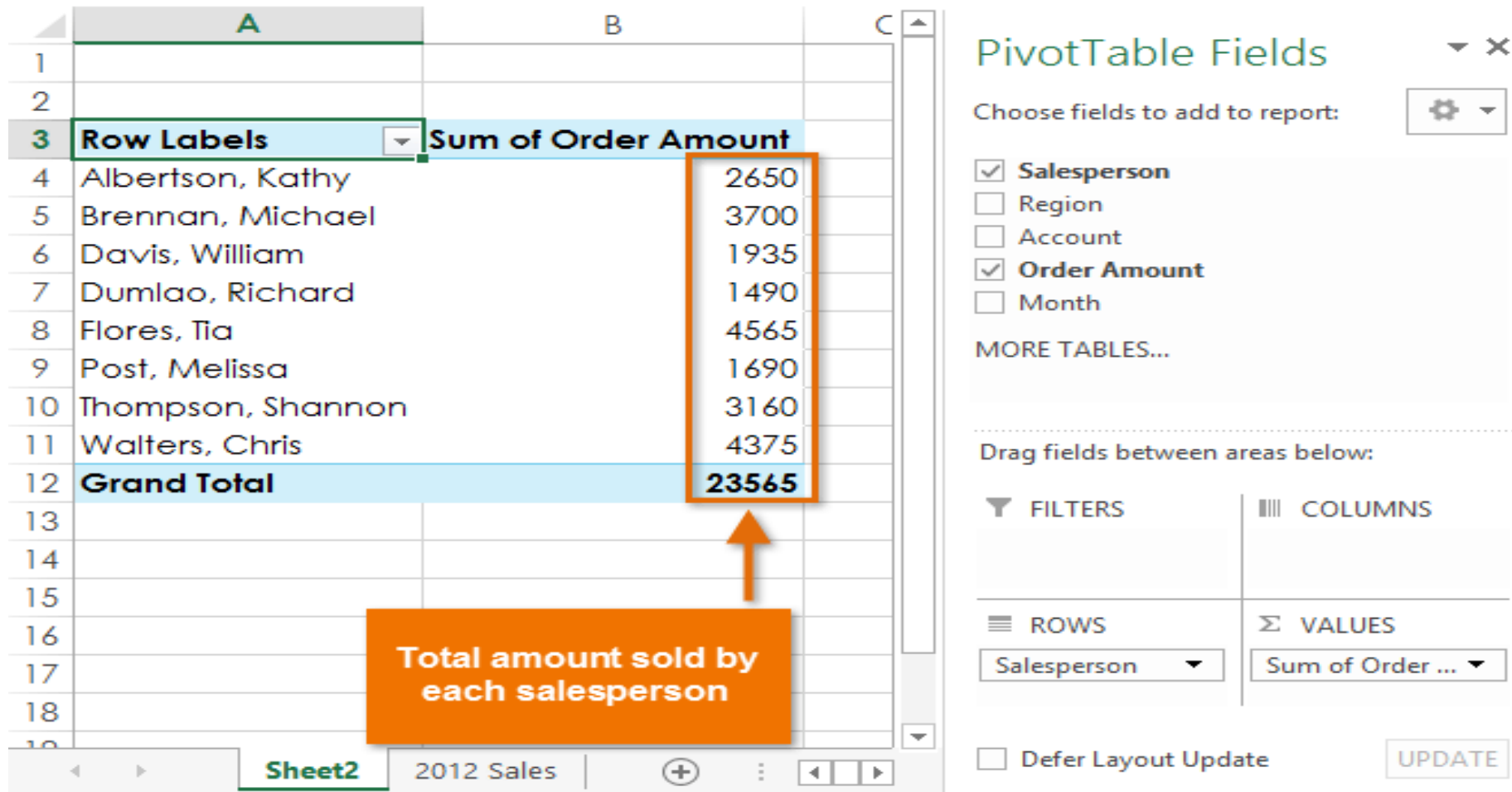
In the **PivotTable Field List**, check the box for each field you want to add. In our example, we want to know the total **amount** sold by each **salesperson**, so we'll check the **Salesperson** and **Order Amount** fields.



Step5: The selected fields will be added to one of the four areas below the Field List. In our example, the **Salesperson** field has been added to the **Rows** area, while the **Order Amount** has been added to the **Values** area.



The PivotTable will calculate and summarize the selected fields. In our example, the PivotTable shows the amount sold by each salesperson.



PivotTable Fields

Choose fields to add to report:

- ☒ Salesperson
- ☐ Region
- ☐ Account
- ☒ Order Amount
- ☐ Month

MORE TABLES...

Drag fields between areas below:

FILTERS	COLUMNS
ROWS	VALUES
Salesperson	Sum of Order ...

☐ Defer Layout Update UPDATE

Row Labels	Sum of Order Amount
Albertson, Kathy	2650
Brennan, Michael	3700
Davis, William	1935
Dumlao, Richard	1490
Flores, Tia	4565
Post, Melissa	1690
Thompson, Shannon	3160
Walters, Chris	4375
Grand Total	23565

Total amount sold by each salesperson

- If we change any of the data in the source worksheet, the PivotTable will not update automatically.
- To manually update it, select the PivotTable and then go to Analyze->Refresh