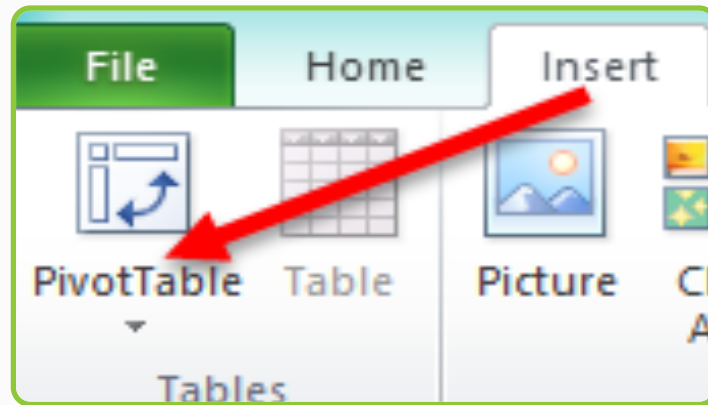# PIVOT TABLE
– CHEAT SHEET –

INSERTING A PIVOT TABLE

Click anywhere your data source or Table and choose Insert > PivotTable

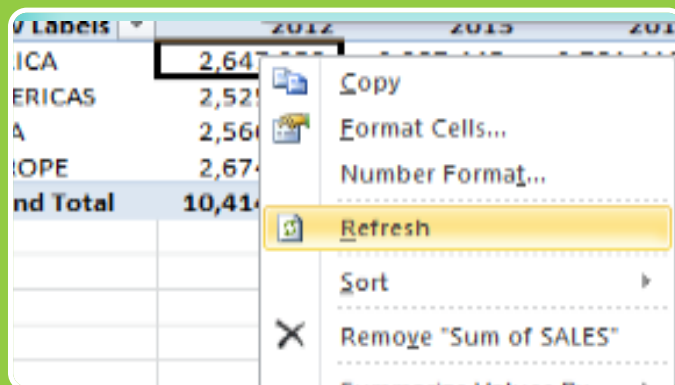**Alt** **N** **V** **T**

REFRESH A PIVOT TABLE

Right click anywhere in the pivot table and select Refresh

Alt **+** **F5**

DRILL DOWN TO AUDIT

Double click with your mouse in a
Pivot Table value

Sum of SALES	Column L ▾		
Row Labels ▾	2012	2013	2014
AMERICAS	12,474,582	2,428,650	2,569,892
EUROPE	2,674,096	2,722,	2,675,496

	A	B	C	D	E	F	G
1	CUSTOMER ▾	PRODUCT ▾	SALES PERSON ▾	SALES REGION ▾	ORDER DATE ▾	SALES ▾	SALES YEAR
2	MOJITOS R US TONIC		Ian Wright	EUROPE	21/07/2014	40250	2014
3	MOJITOS R US TONIC		Ian Wright	EUROPE	04/07/2014	67683	20
4	MOJITOS R US TONIC		Ian Wright	EUROPE	22/11/2014	68907	2014
5	MOJITOS R US TONIC		Ian Wright	EUROPE	08/11/2014	86024	20
6	MOJITOS R US TONIC		Ian Wright	EUROPE	26/05/2014	28516	201
7	MOJITOS R US TONIC		Ian Wright	EUROPE	26/05/2014	25998	2014
8	MOJITOS R US TONIC		Ian Wright	EUROPE	26/05/2014	18144	201
9	MOJITOS R US TONIC		Ian Wright	EUROPE	26/05/2014	76399	20
10	MOJITOS R US TONIC		Ian Wright	EUROPE	26/05/2014	68096	2

PIVOT TABLE STYLES

Click anywhere in your Pivot Table, then
choose Design > Pivot Table Styles

PivotTable Tools

Options | Design

PivotTable Styles

Sum of SALES	Column L			
Row Labels ▾	2012	2013	2014	Grand Total
AMERICAS	2,499,582	2,428,650	2,569,892	7,498,124
EUROPE	2,674,096	2,722,129	2,675,496	8,071,721
ASIA	2,566,978	2,879,900	2,711,156	8,158,034
AFRICA	2,647,950	2,987,445	2,701,418	8,336,813
Grand Total	10,388,606	11,018,124	10,657,962	32,064,692

INSERT/REMOVE SUBTOTALS & GRAND TOTALS

Click anywhere in your Pivot Table, then choose **Design > Subtotals/Grand Totals**
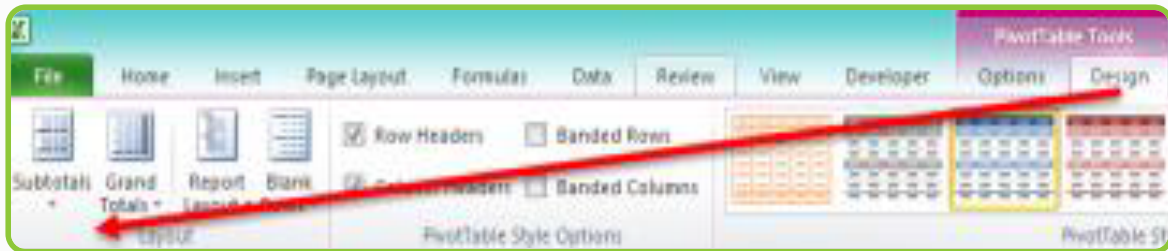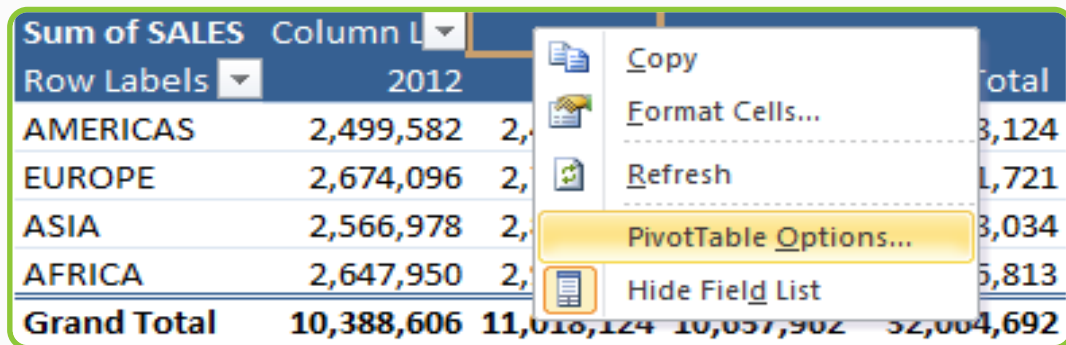

NUMBER FORMATTING

Right click on any values within the Pivot Table and Select **Number Format**

PIVOT TABLE OPTIONS

Right click anywhere in the Pivot Table and select **Pivot Table Options**

Sum of SALES	Column L ▼			
Row Labels ▼	2012			Total
AMERICAS	2,499,582	2,		3,124
EUROPE	2,674,096	2,		1,721
ASIA	2,566,978	2,		3,034
AFRICA	2,647,950	2,		5,813
Grand Total	10,388,606	11,018,124	10,657,962	32,004,692

Right-click menu:
- Copy
- Format Cells…
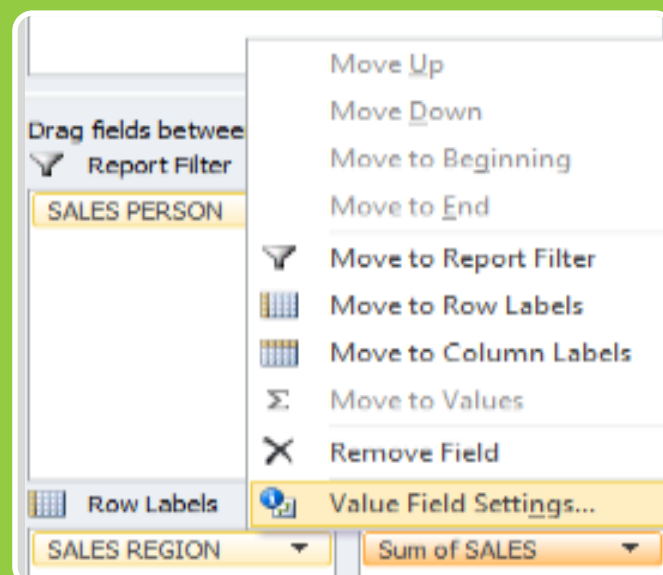- Refresh
- PivotTable Options…
- Hide Field List

SUMMARIZE VALUES BY / SHOW VALUES AS

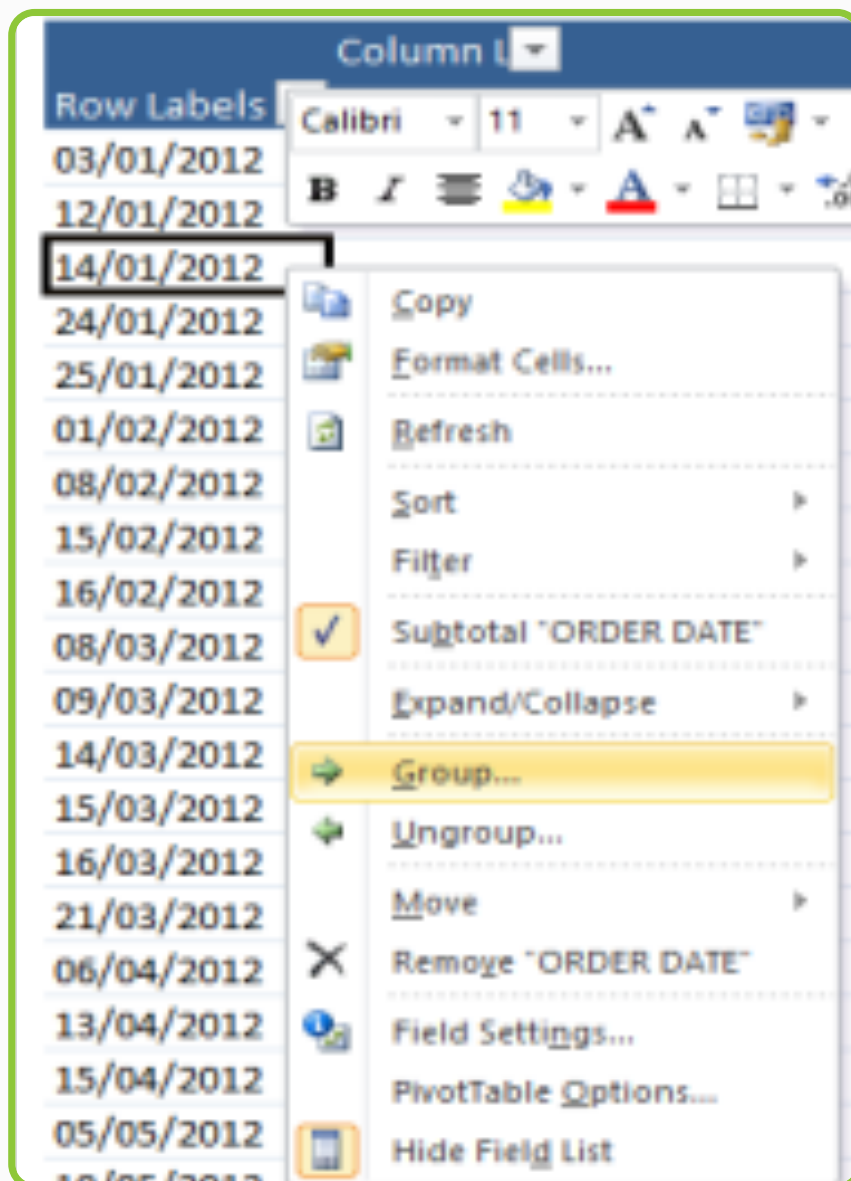Right click anywhere in the Pivot Table and select **Summarize Values By or Show Values As**
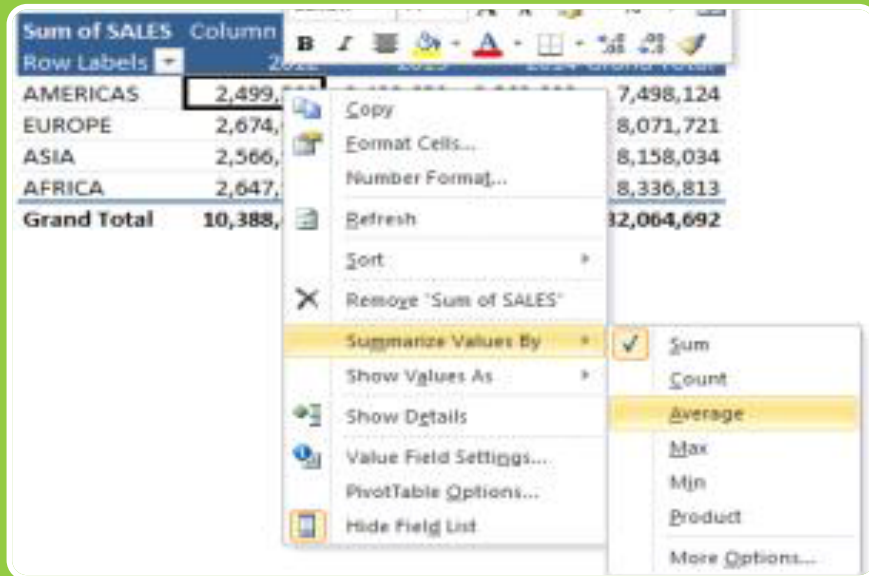
…Or in the Field List Values Area, choose the drop down arrow and select

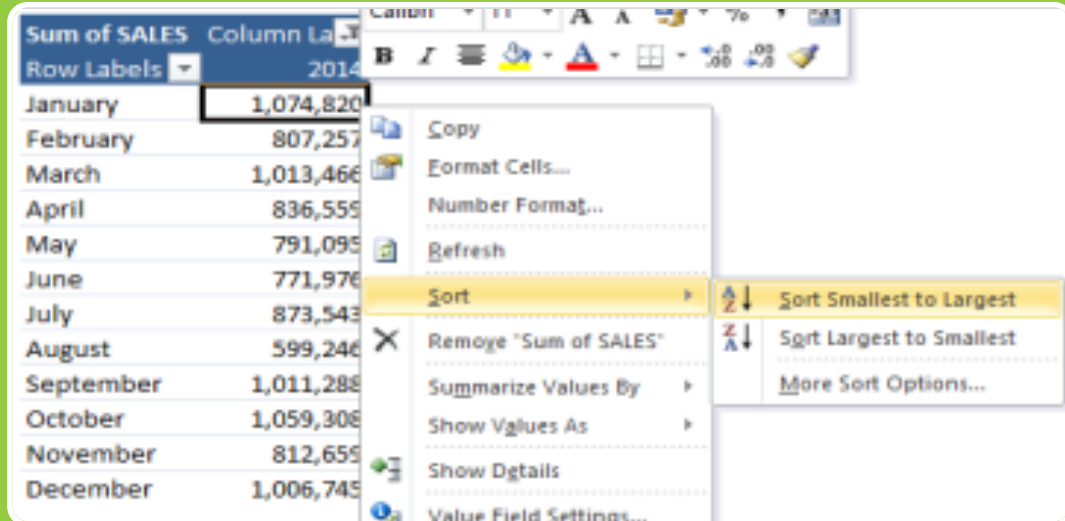**Value Field Settings > Summarize Values By or Show Values As**

GROUPING

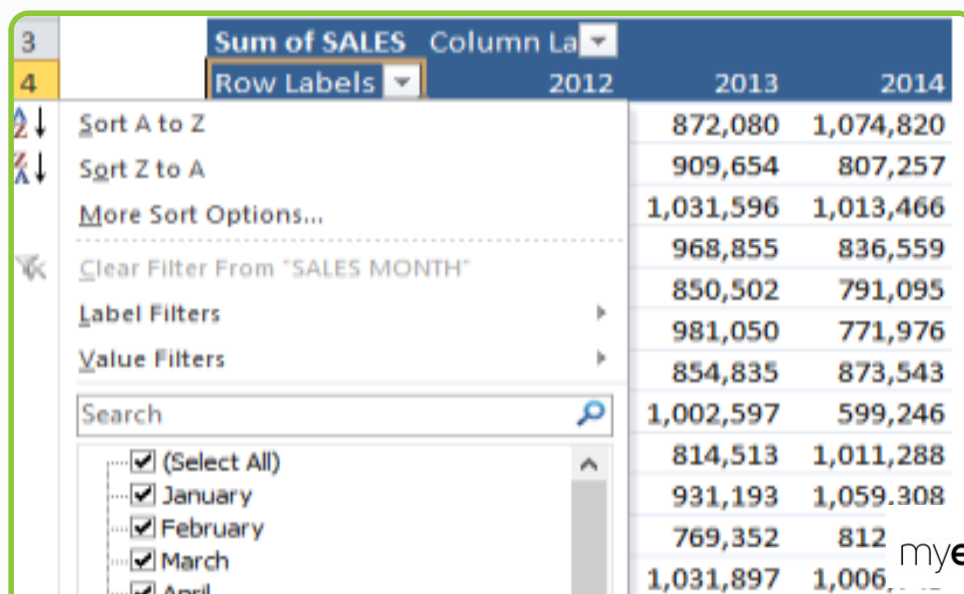Right click anywhere in the Pivot Table
and select   **Group**

SORTING

Right click anywhere in the Pivot Table and select **Sort**

FILTERING

Click on the Row/Column drop down arrow to access the **Filter**
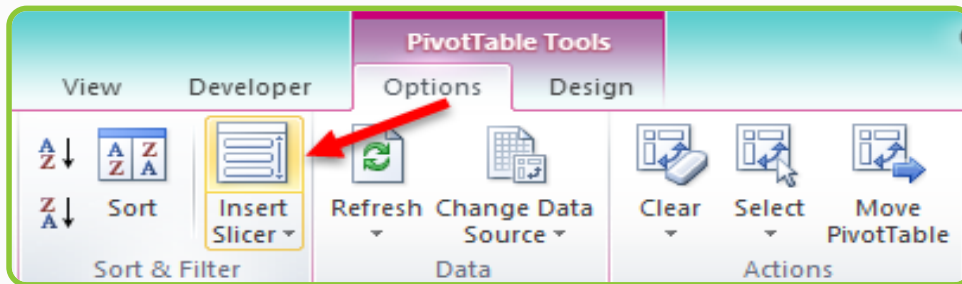

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DES/ACTIVATE GETPIVOTDATA

Click anywhere in your Pivot Table, then choose Options/Analyze > Options drop down box > Generate GetPivotData
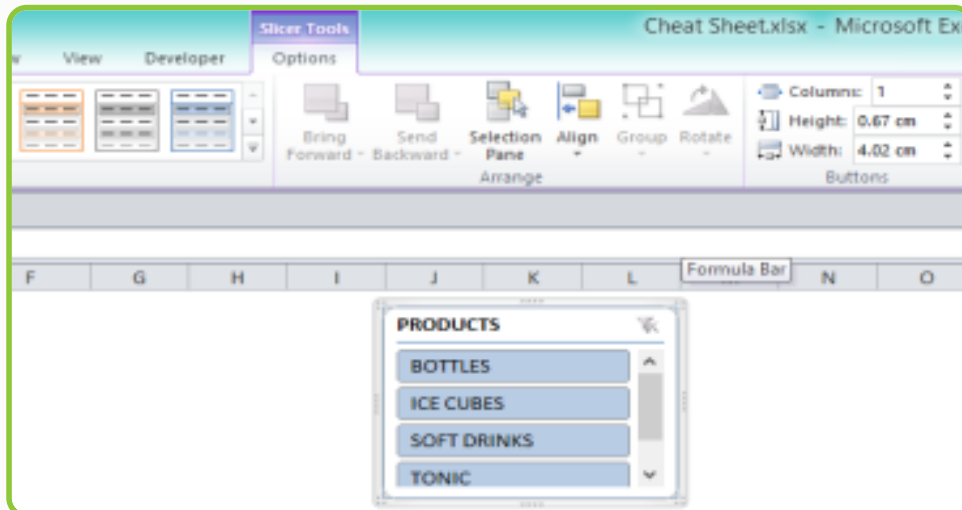
SLICERS

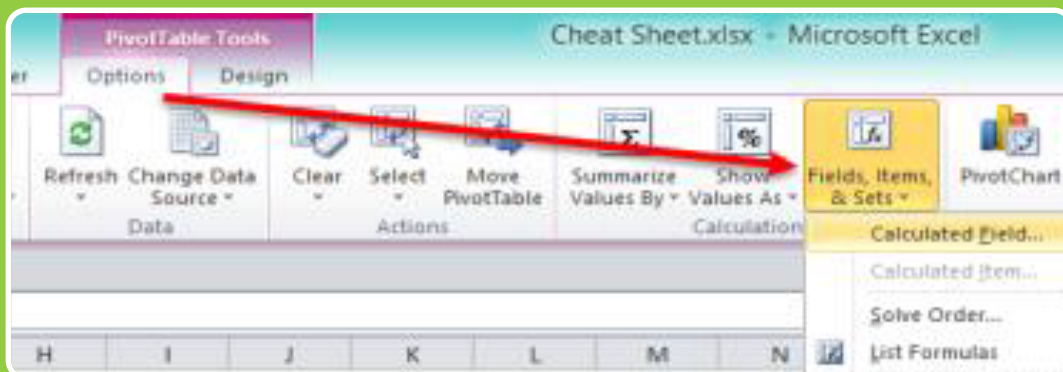Click anywhere in your Pivot Table, then choose

Options/Analyze > Slicers

Click on the Slicer to activate the

Slicer Tools/Options tab

CALCULATED FIELDS

Click in the values area of your Pivot Table, choose **Options/Analyze > Fields, Items & Sets > Calculated Field**

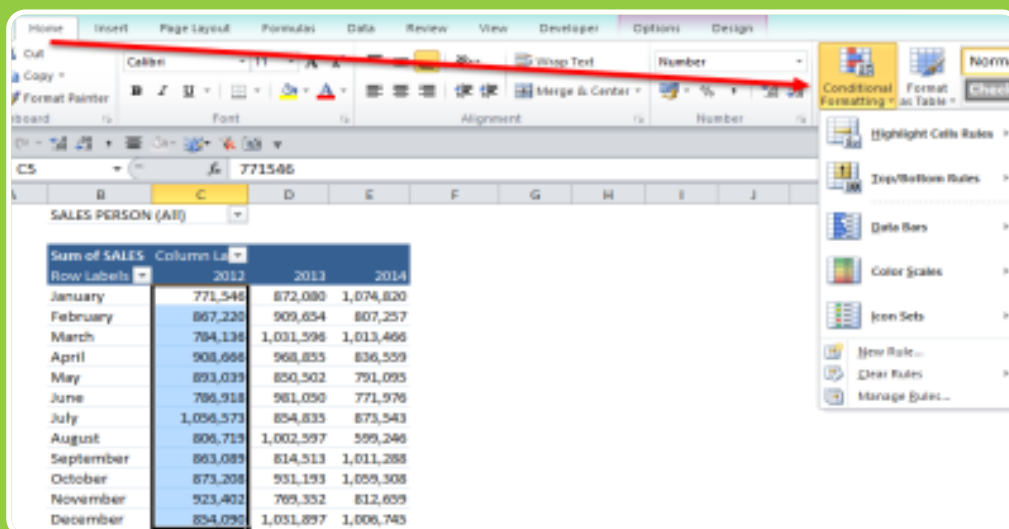| Sum of SALES	Column La ▼		
Row Labels ▼	2012	2013	2014
January	771,546	~~872,000~~	1,074,820
February	867,2~~2~~0	909,654	807,257
March	784,136	~~1,031,396~~	1,013,466
April	908,666	968,855	836,559
May	893,039	850,502	791,095
June	786,918	981,050	771,976
July	1,056,573	854,835	873,543

PIVOT CHARTS

Click anywhere in your Pivot Table, then choose   **Options/Analyze > PivotChart**
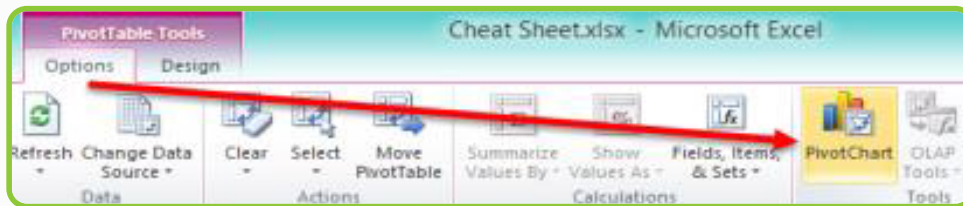
CONDITIONAL FORMATTING PIVOT TABLES

Highlight the values in your Pivot Table, then choose   Home > Conditional Formatting