

Excel Pivot Tables - Tools

In the worksheet containing a PivotTable, the Ribbon will contain the PivotTable Tools, with ANALYZE and DESIGN Tabs. The ANALYZE tab has several commands that will enable you to explore the data in the PivotTable. The DESIGN tab commands will be useful to structure the PivotTable with various report options and style options.

You will learn the ANALYZE commands in this chapter. You will learn the DESIGN commands in the Chapter - Aesthetic Reports with PivotTables.

ANALYZE Commands

The commands on the Ribbon of ANALYZE tab include the following –

- Expanding and Collapsing a Field.
- Grouping and Ungrouping Field Values.
- Active Field Settings.
- PivotTable Options.




Expanding and Collapsing a Field

If you have nested fields in your PivotTable, you can expand and collapse a single item or you can expand and collapse all the items of the active field.


Consider the following PivotTable, wherein you have Salesperson field nested under Region field.

	A	B	C	D	E
1					
2					
3	Sum of Order Amount	Column Labels ▼			
4	Row Labels ▼	January	February	March	Grand Total
5	[-] East	1690	1950	700	4340
6	Albertson, Kathy	925	1375	350	2650
7	Post, Melissa	765	575	350	1690
8	[-] North	1140	1720	300	3160
9	Thompson, Shannon	1140	1720	300	3160
10	[-] South	3110	3975	3790	10875
11	Davis, William	1100	235	600	1935
12	Flores, Tia	1655	985	1925	4565
13	Walters, Chris	355	2755	1265	4375
14	[-] West	3150	1515	525	5190
15	Brennan, Michael	2750	550	400	3700
16	Dumlao, Richard	400	965	125	1490
17	Grand Total	9090	9160	5315	23565

Click the  symbol to the left of East. The item East of the field Region will collapse.

	A	B	C	D	E
1					
2					
3	Sum of Order Amount	Column Labels ▼			
4	Row Labels ▼	January	February	March	Grand Total
5	[+] East	1690	1950	700	4340
6	[-] North	1140	1720	300	3160
7	Thompson, Shannon	1140	1720	300	3160
8	[-] South	3110	3975	3790	10875
9	Davis, William	1100	235	600	1935
10	Flores, Tia	1655	985	1925	4565
11	Walters, Chris	355	2755	1265	4375
12	[-] West	3150	1515	525	5190
13	Brennan, Michael	2750	550	400	3700
14	Dumlao, Richard	400	965	125	1490
15	Grand Total	9090	9160	5315	23565

As you can observe, the other items - North, South and West of the field Region are not collapsed. If you want to collapse any of them, repeat the steps that you have done for East.

- Click on the  symbol to the left of East. The item East of the field Region will expand.

If you want to collapse all the items of a field at once, do the following –

- Click any of the items of the field – Region.
- Click the ANALYZE tab on the Ribbon.
- Click Collapse Field in the Active Field group.

The screenshot shows the Excel interface with the PivotTable Tools - Analyze tab active. The 'Collapse Field' button is highlighted in the 'Active Field' group. The PivotTable Fields task pane on the left shows 'Region' selected. The PivotTable in the background shows a summary of order amounts by region and month.

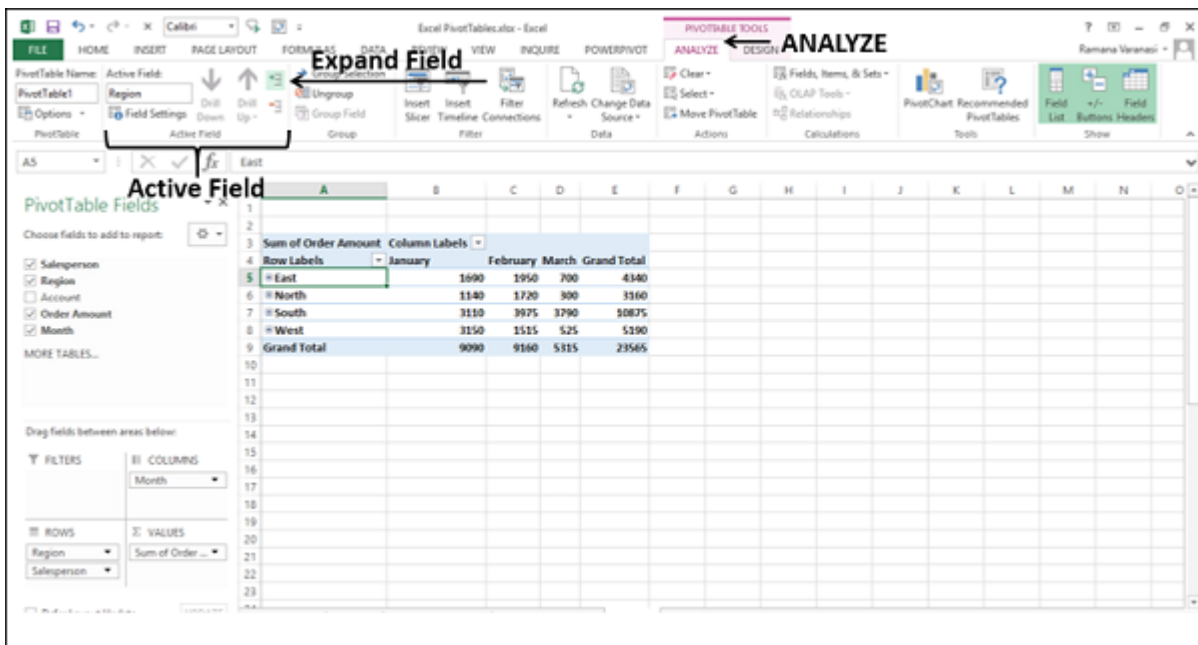
Row Labels	January	February	March	Grand Total
East	1690	1950	700	4340
North	1140	1720	300	3160
South	3110	3975	3790	10875
West	3150	1515	525	5190
Grand Total	9090	9160	5315	23565

All the items of the field Region will be collapsed.

	A	B	C	D	E
1					
2					
3	Sum of Order Amount	Column Labels			
4	Row Labels	January	February	March	Grand Total
5	East	1690	1950	700	4340
6	North	1140	1720	300	3160
7	South	3110	3975	3790	10875
8	West	3150	1515	525	5190
9	Grand Total	9090	9160	5315	23565

If you want to expand all the items of a field at once, do the following –

- Click on any of the items of the field – Region.
- Click the ANALYZE tab on the Ribbon.
- Click Expand Field in the Active Field group.



All the items of the field Region will be expanded.

Grouping and Ungrouping Field Values

You can group and ungroup field values to define your own clustering. For example, you might want to know the data combining East and North regions.

- Select the East and North items of the Region field in the PivotTable, along with the nested Salesperson field items.
- Click the ANALYZE tab on the Ribbon.
- Click Group Selection in the group – Group.

Group Selection

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW INC

PivotTable Name: PivotTable1 Active Field: Region

Options Field Settings Drill Down Drill Up

Group Selection Ungroup Group Field Group

Group

A5 : fx East

	A	B	C	D	E	F	G
1							
2							
3	Sum of Order Amount	Column Labels					
4	Row Labels	January	February	March	Grand Total		
5	East	1690	1950	700	4340		
6	Albertson, Kathy	925	1375	350	2650		
7	Post, Melissa	765	575	350	1690		
8	North	1140	1720	300	3160		
9	Thompson, Shannon	1140	1720	300	3160		
10	South	3110	3975	3790	10875		
11	Davis, William	1100	235	600	1935		
12	Flores, Tia	1655	985	1925	4565		
13	Walters, Chris	355	2755	1265	4375		
14	West	3150	1515	525	5190		
15	Brennan, Michael	2750	550	400	3700		
16	Dumlao, Richard	400	965	125	1490		
17	Grand Total	9090	9160	5315	23565		

Selection

The items – East and North will be grouped under the name Group1. In addition, a new South is created under which South is nested and a new West is created under which West is nested.

PivotTable Fields

Choose fields to add to report:

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

Drag fields between areas below:

Region2

Region2

Region

Salesperson

Month

Sum of Order ...

	A	B	C	D	E
1					
2					
3	Sum of Order Amount	Column Labels			
4	Row Labels	January	February	March	Grand Total
5	Group1				
6	East	1690	1950	700	4340
7	Albertson, Kathy	925	1375	350	2650
8	Post, Melissa	765	575	350	1690
9	North	1140	1720	300	3160
10	Thompson, Shannon	1140	1720	300	3160
11	South				
12	South	3110	3975	3790	10875
13	Davis, William	1100	235	600	1935
14	Flores, Tia	1655	985	1925	4565
15	Walters, Chris	355	2755	1265	4375
16	West				
17	West	3150	1515	525	5190
18	Brennan, Michael	2750	550	400	3700
19	Dumlao, Richard	400	965	125	1490
20	Grand Total	9090	9160	5315	23565

You can also observe that a new field – Region2 is added in the PivotTable Fields list, which appears in the ROWS area.

- Select the South and West items of the Region2 field in the PivotTable, along with the nested Region and Salesperson field items.
- Click the ANALYZE tab on the Ribbon.
- Click Group Selection in the group – Group.

Group Selection

PivotTable Fields

Choose fields to add to report:

- ☐ Account
- ☒ Order Amount
- ☒ Month
- ☒ Region2

Drag fields between areas below:

FILTERS

COLUMNS

Month

ROWS

Region2

Region

Salesperson

VALUES

Sum of Order ...

Sum of Order Amount	Column Labels	January	February	March	Grand Total
Group1					
East		1690	1950	700	4340
Albertson, Kathy		925	1375	350	2650
Post, Melissa		765	575	350	1690
North		1140	1720	300	3160
Thompson, Shannon		1140	1720	300	3160
South		3110	3975	3790	10875
South		1100	235	600	1935
Davis, William		1655	985	1925	4565
Flores, Tia		2755	1265		4375
Walters, Chris					
West		3150	1515	525	5190
West		2750	550	400	3700
Brennan, Michael		400	965	125	1490
Dumlao, Richard					
Grand Total		9090	9160	5315	23565

The items – South and West of the field Region will be grouped under the name Group2.

PivotTable Fields

Choose fields to add to report:

- ☒ Order Amount
- ☒ Month
- ☒ Region2

MORE TABLES

Drag fields between areas below:

FILTERS

Region2

ROWS

Region2

Region

Salesperson

COLUMNS

Month

VALUES

Sum of Order ...

	A	B	C	D	E
1					
2					
3	Sum of Order Amount	Column Labels			
4	Row Labels	January	February	March	Grand Total
5	Group1				
6	East	1690	1950	700	4340
7	Albertson, Kathy	925	1375	350	2650
8	Post, Melissa	765	575	350	1690
9	North	1140	1720	300	3160
10	Thompson, Shannon	1140	1720	300	3160
11	Group2				
12	South	3110	3975	3790	10875
13	Davis, William	1100	235	600	1935
14	Flores, Tia	1655	985	1925	4565
15	Walters, Chris	355	2755	1265	4375
16	West	3150	1515	525	5190
17	Brennan, Michael	2750	550	400	3700
18	Dumlao, Richard	400	965	125	1490
19	Grand Total	9090	9160	5315	23565
20					
21					

To ungroup a group, do the following –

- Click on the Group Name.
- Click the ANALYZE tab.
- Click Ungroup in the group – Group.

PivotTable Fields

Choose fields to add to report:

- ☐ Account
- ☒ Order Amount
- ☒ Month
- ☒ Region2

Drag fields between areas below:

FILTERS

Region2

Region

Salesperson

COLUMNS

Month

VALUES

Sum of Order ...

	A	B	C	D	E	F
1						
2						
3	Sum of Order Amount	Column Labels				
4	Row Labels	January	February	March	Grand Total	
5	Group1					
6	East	1690	1950	700	4340	
7	Albertson, Kathy	925	1375	350	2650	
8	Post, Melissa	765	575	350	1690	
9	North	1140	1720	300	3160	
10	Thompson, Shannon	1140	1720	300	3160	
11	Group2					
12	South	3110	3975	3790	10875	
13	Davis, William	1100	235	600	1935	
14	Flores, Tia	1655	985	1925	4565	
15	Walters, Chris	355	2755	1265	4375	
16	West	3150	1515	525	5190	
17	Brennan, Michael	2750	550	400	3700	
18	Dumlao, Richard	400	965	125	1490	
19	Grand Total	9090	9160	5315	23565	
20						
21						

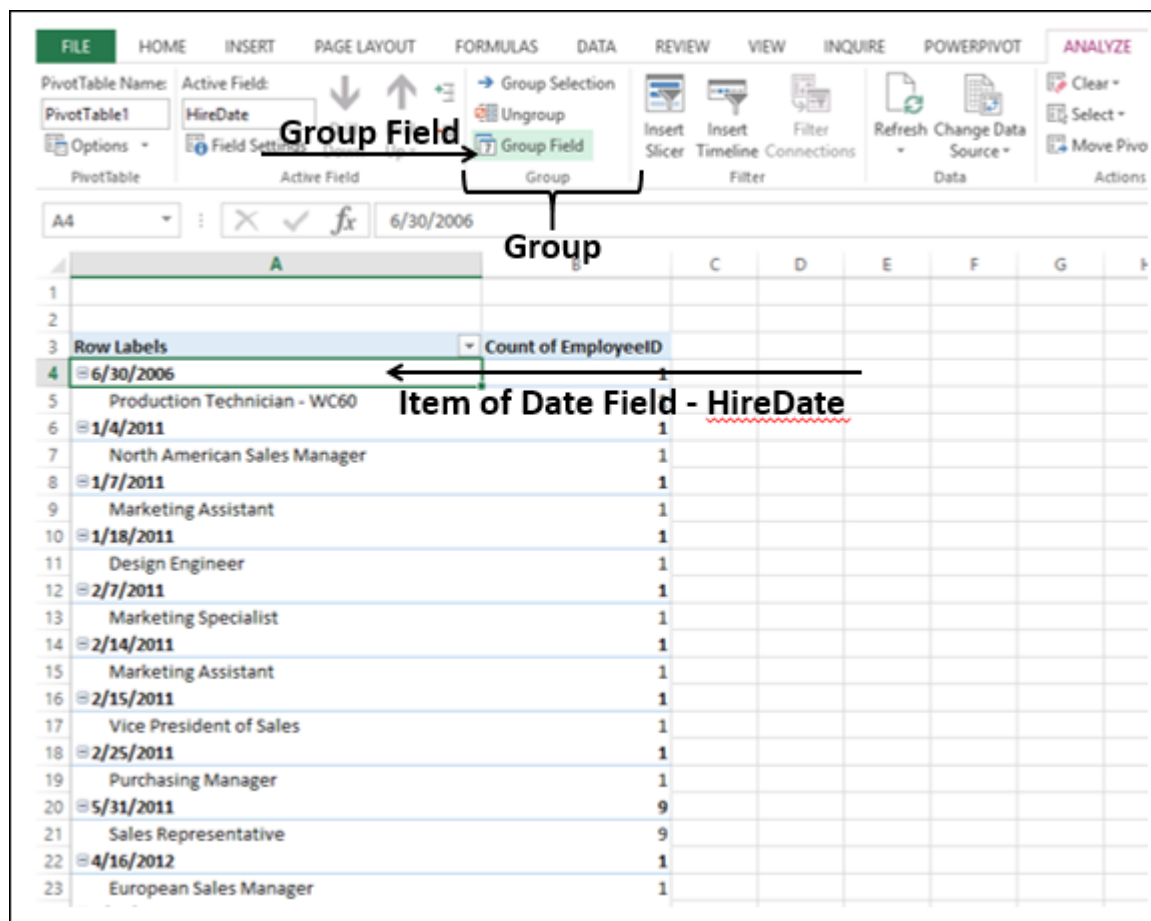
Grouping by a Date Field

Consider the following PivotTable, wherein you have the employee data summarized by Count of EmployeeID, hiredate wise and title wise.

	A	B
1		
2		
3	Row Labels	Count of EmployeeID
4	6/30/2006	1
5	Production Technician - WC60	1
6	1/4/2011	1
7	North American Sales Manager	1
8	1/7/2011	1
9	Marketing Assistant	1
10	1/18/2011	1
11	Design Engineer	1
12	2/7/2011	1
13	Marketing Specialist	1
14	2/14/2011	1
15	Marketing Assistant	1
16	2/15/2011	1
17	Vice President of Sales	1
18	2/25/2011	1
19	Purchasing Manager	1
20	5/31/2011	9
21	Sales Representative	9
22	4/16/2012	1
23	European Sales Manager	1

Suppose you want to group this data by the HireDate field that is a Date field into years and quarters.

- Click on a Date item in the PivotTable.
- Click the ANALYZE tab on the Ribbon.
- Click Group Field in the group – Group.



The Grouping dialog box appears.

- Set the dates for – Starting at and Ending at.
- Select Quarters and Years in the box under By. To select / deselect multiple items, keep the Ctrl-key pressed.
- Click OK.

Grouping ? X

Auto

☒ Starting at: 6/30/2006

☒ Ending at: 12/31/2015

By

Seconds
Minutes
Hours
Days
Months
Quarters
Years

Number of days: 1

OK Cancel

The HireDate field values will be grouped into Quarters, nested in Years.

	A	B
1		
2		
3	Row Labels	Count of EmployeeID
4	2006	
5	Qtr2	1
6	Production Technician - WC60	1
7	2011	
8	Qtr1	7
9	Design Engineer	1
10	Marketing Assistant	2
11	Marketing Specialist	1
12	North American Sales Manager	1
13	Purchasing Manager	1
14	Vice President of Sales	1
15	Qtr2	9
16	Sales Representative	9
17	2012	
18	Qtr2	3
19	European Sales Manager	1
20	Sales Representative	2
21	Qtr3	1
22	Sales Representative	1
23	2013	

If you want to ungroup this grouping, you can do as shown earlier, by clicking **Ungroup** in the group – Group on the Ribbon.

Active Value Field Settings

You can set a field options by clicking on a value of that field. Consider the example of sales data that we used earlier in this chapter.

	A	B	C	D	E
1					
2					
3	Sum of Order Amount	Column Labels			
4	Row Labels	January	February	March	Grand Total
5	East	1690	1950	700	4340
6	Albertson, Kathy	925	1375	350	2650
7	Post, Melissa	765	575	350	1690
8	North	1140	1720	300	3160
9	Thompson, Shannon	1140	1720	300	3160
10	South	3110	3975	3790	10875
11	Davis, William	1100	235	600	1935
12	Flores, Tia	1655	985	1925	4565
13	Walters, Chris	355	2755	1265	4375
14	West	3150	1515	525	5190
15	Brennan, Michael	2750	550	400	3700
16	Dumlao, Richard	400	965	125	1490
17	Grand Total	9090	9160	5315	23565
18					

Suppose you want to set the options for the Region field.

- Click on East. On the Ribbon, in the Active Field group, in the Active Field box, Region will be displayed.
- Click on **Field Settings**. The Field Settings dialog box appears.

Active Field

Field Settings

Field Settings Dialog Box

Source Name: Region
Custom Name: Region

Subtotals & Filters | Layout & Print

Subtotals

☒ Automatic
☐ None
☐ Custom

Select one or more functions:

Sum
Count
Average
Max
Min
Product

Filter

☐ Include new items in manual filter

OK Cancel

Row Labels	January	February	March	Grand Total
East	1690	1950	700	
Albertson, Kathy	925	1375	350	
Post, Melissa	765	575	350	
North	1140	1720	300	
Thompson, Shannon	1140	1720	300	
South	3110	3975	3790	
Davis, William	1100	235	600	
Flores, Tia	1655	985	1925	
Walters, Chris	355	2755	1265	
West	3150	1515	525	
Brennan, Michael	2750	550	400	
Dumlao, Richard	400	965	125	
Grand Total	9090	9160	5315	

You can set your preferences for the field – Region.

PivotTable Options

You can set the PivotTable Options according to your preferences.

- Click on the PivotTable.
- Click the ANALYZE tab.
- Click Options in the PivotTable group.

Options

PivotTable

ANALYZE

Row Labels	January	February	March	Grand Total
East	1690	1950	700	4340
Albertson, Kathy	925	1375	350	2650
Post, Melissa	765	575	350	1690
North	1140	1720	300	3160
Thompson, Shannon	1140	1720	300	3160
South	3110	3975	3790	10875
Davis, William	1100	235	600	1935
Flores, Tia	1655	985	1925	4565
Walters, Chris	355	2755	1265	4375
West	3150	1515	525	5190
Brennan, Michael	2750	550	400	3700
Dumlao, Richard	400	965	125	1490
Grand Total	9090	9160	5315	23565

The **PivotTable Options** dialog box appears. You can set your preferences in the dialog box.

The screenshot shows the 'PivotTable Options' dialog box with the 'Layout & Format' tab selected. The 'PivotTable Name' is 'PivotTable1'. The 'Layout' section includes options for merging cells, compact form indentation, and report filter area display. The 'Format' section includes options for error values, empty cells, autofit, and preserving formatting.

PivotTable Options ? X

PivotTable Name:

Layout & Format | Totals & Filters | Display | Printing | Data | Alt Text

Layout

☐ Merge and center cells with labels

When in compact form indent row labels: character(s)

Display fields in report filter area: ▼

Report filter fields per column:

Format

☐ For error values show:

☒ For empty cells show:

☒ Autofit column widths on update

☒ Preserve cell formatting on update

OK Cancel