

Excel Pivot Tables: Creating a PivotTable

↳ You can create a PivotTable from a range of data or an Excel table. You can start with an empty PivotTable to fill in the details, if you are aware of what you are looking for.

↳ You can also make use of Excel Recommended PivotTables that can give you heads up on the PivotTable layouts that are best suited for summarizing your data.

↳ You will learn how to create a PivotTable from a data range or Excel table in the Chapter Creating a PivotTable from a Table or Range.

↳ Excel gives you a more powerful way of creating a PivotTable from multiple tables, different data sources, and external data sources. It is named as ~~PowerPoint~~ PowerPivot that works on its database known as Data Model. You need to first know about the normal PivotTable as explained in this tutorial, before you venture into the power tools.

PivotTable Layout - Fields and Areas:

↳ The PivotTable layout simply depends on what fields you have selected for the report and how you have arranged them in Areas.

↳ The selection and arrangement can be done by just dragging the fields.

↳ As you drag the fields, the PivotTable layout keeps the changing and it happens in a matter of seconds.

Excel Pivot Tables:

A PivotTable is an extremely powerful tool that you can use to slice and dice data. You can track and analyze thousands of data points with a compact table that can be changed dynamically to enable you to find the different perspectives of the data. It is a simple tool to use, yet powerful. The major features of a PivotTable are as follows:

- ↳ Creating a PivotTable is extremely simple and fast.
- ↳ Enabling churning of data instantly by simple dragging of fields, sorting and filtering and different calculations on the data.
- ↳ Arriving at the suitable representation for your data as you gain insights into it.
- ↳ Ability to create reports on the fly.
- ↳ Producing multiple reports from the same PivotTable in a matter of seconds.
- ↳ Providing interactive reports to synchronize with the audience.

Exploring Data with PivotTable:

- ↳ The primary goal of using a PivotTable normally is to explore the data to extract significant and required information. You have several options to do this that include Sorting, Filtering, Nesting, Collapsing and Expanding, Grouping and Ungrouping, etc.
- ↳ You will have an overview of these options in the Chapter - Exploring Data with PivotTable.

Summarizing Values!

↳ Once you collate the data required by you by the different exploration techniques, the next step that you would like to take is to summarize the data.

↳ Excel provides you with a variety of calculation types that you can apply based on suitability and requirement.

You can also switch across different calculation types and view the results in a matter of seconds.

Updating a PivotTable:

↳ Once you have explored the data and summarized it, you need not repeat the exercise if and when the source data gets updated. You can refresh the pivotTable so that it reflects the changes in the source data.

Excel Pivot Tables - Creation:

↳ You can create a PivotTable either from a range of data or from an Excel table. In both the cases, the first row of the data should contain the headers for the columns.

↳ If you are sure of the fields to be included in the PivotTable and the layout you want to have, you can start with an empty PivotTable and construct the PivotTable.

↳ In case you are not sure which PivotTable layout is best suitable for your data, you can make use of Recommended PivotTables command of Excel to view the PivotTables

customized to your data and choose the one you like.

↳ Creating a PivotTable from a Data Range.

↳ Consider the following data range that contains the sales data for each Salesperson, in each Region and in the months of January, February and March.

To create a PivotTable from this data range, do the following —

↳ Ensure that the first row has headers. You need headers because they will be the field names in your PivotTable.

↳ Name the data range as SalesData - Range.

↳ Click on the data range — SalesData - Range.

↳ Click the INSERT tab on the Ribbon.

Click PivotTable in the Tables group. The Create PivotTable dialog box appears.

In Create PivotTable dialog box, under Choose the data that you want to analyze, you can either select a Table or Range from the current workbook or use an external data sources. As you are creating a PivotTable from a data range, select the following from the dialog box —

☐ Select Select table or range.

☐ In the Table / Range box, type the range name — SalesData - Range.

☐ Select New Worksheet under Choose where you want the PivotTable report to be placed and click OK.

You can choose to analyze multiple tables, by adding this data range to Data Model. You can learn how to analyze multiple tables, use of Data Model and how