📊 Pivot Table Chapter 2 Notes

◆ 1. Summary (Summarizing Data)

- To change how values are summarized:
    - Go to Analyze tab → **Field Settings** → **Show Values As** → Select desired summary format (e.g., Sum, Count, Average, etc.).

◆ 2. Subtotals and Grand Totaals

- You can choose whether to show **subtotals** and **grand totals** in your Pivot Table.
    - Select the Pivot Table → Go to **Design** tab → **Layout** group → Choose subtotal and grand total options.

◆ 3. Using the Same Field Multiple Times

- You can insert the **same field more than once** in the Values area and apply different calculations or number formats:
    - Insert the value field twice → Right-click on one of them → **Value Field Settings** → Use **Show Values As** to apply a different format.

◆ 4. Grouping Data

- **To group data:**
    - Select the data to group → Go to **Analyze** tab → Click **Group Selection**.
- **To ungroup data:**
    - Select grouped data → **Analyze** tab → Click **Ungroup**.

◆ 5. Drill Down (See Underlying Data)

- To view the detailed data behind a value:
    - **Double-click** on the Pivot Table value cell to open the source data in a new sheet.

◆ 6. Calculated Field

- To add a **calculated field**:
    - Go to **Analyze** tab → **Calculations** group → **Fields, Items & Sets** → **Calculated Field**.
    - Enter a field name and formula, then click **OK**.