



Now that we know how to create a pivot shell and we know what the different areas of our pivot table are, it's time to create our first PivotTable.

The first question we want to ask our data is:

What is the total value of all current projects, per status for each of the states?

To answer this, we're going to start by finding the value field. As we want to calculate the total value of projects, our 'Project Value' field will need to be summarised, hence that will be our value field. So let's drag that in. Grab your project value from the fields list and drag it down to the values area.

Now we can see the total project value in our pivot table. I don't know about you, but I can't easily read that number without the correct number formatting, so let's quickly fix that before we do anything else.

It's really important when we fix the number formatting that we're fixing the formatting for the field, not the cell. To change the number formatting for the field, right-click the field within the PivotTable (the number displayed) and select number format. From the number formatting dialog box, select either currency or accounting from the categories on the left, to show the dollar symbol and comma between the thousands. As our project values are all recorded in whole dollars, we don't need 2 places after the decimal, so let's reduce that to zero and click OK.

Now we can see our sum of all projects is \$390m. Remember that's all projects, including tenders that were lost, and projects that have been completed.

So let's drag those extra fields in so we can break it down by status and by year.

Drag the status field from the field list into the Rows area, to see each project status summarised on a separate row. Now we have a more accurate picture. All active projects (tenders that were won) is \$130m, but we can see that there is still \$188m worth of tenders that have been submitted but not yet won or lost. So we have \$130m of current work plus another \$188m of potential work coming up. This is useful information.

Notice that as the status field was dragged in, the number formatting adopted the attributes we assigned earlier. That's because we formatted the field, not the cells. So the formatting is automatically applied to all cells that represent that field.

When the fields are dropped into the PivotTable, Excel drops the items in each field in alphabetical order, but that doesn't really work for us.

The flow of our tendering process is: Tender Active (where we start working on the tender), then Tender – Submitted (we've compiled the tender and submitted it to our client), then we hear back from our client about our success and the status is changed to Won – Active Project or Tender – Lost. Once work on the project is all wrapped up, the status changes to Closed Project.

So let's change the order that the status' appear in our list. As the first step is 'Tender – Active', right click on that item in the PivotTable and from the right click menu, select Move, then from the pop-out, select Move "Tender – Active" to beginning. Now Tender – Active is at the top of the list. Let's do that for the next item: Tender – Submitted. Right click on Tender – Submitted and select Move,

then Move Tender – Submitted Up. You may need to repeat that step to see Tender – Submitted in second place.

Move the remaining items up or down in the list using the same method (Right click Move > Move to beginning / Move up / Move down / Move to End), until the status appear in the correct order:

- I Tender – Active
- I Tender – Submitted
- I Won – Active Project
- I Tender – Lost
- I Closed Project

This is a bit easier to read as the first 2 items are potential works, the third item is confirmed works and the last 2 are neither as they are not proceeding or are already complete.

Of course this is still summarising the data for all states for all time. So let's break it down further.

Drag the state field into the rows area. If we've dropped it beneath the Status field then our PivotTable will display the total per status, with a breakdown per state. IF we prefer it to be displayed with the total per state, split according to status, drag the Status field and drop it beneath the state field (in the rows area). But I do think we get better information when it's the other way around, so let's drop the State field beneath status.

This looks great. With the correct formatting and layout it's even easier to get real information out of our PivotTable. Information like:

- We can determine the value of current works by asking:
 - What is the value of all active projects in the Northern Territory.

This should help us determine if we have adequate staff assigned in the territory

- Or we can potential forecast future works by asking:
 - What is the value of Tenders submitted in New South Wales

This will help us determine our personnel requirements for the near future

- We can look at the time we are wasting on quotes that don't proceed by asking:
 - What is the value of all tenders lost in Western Australia?

So with just a few clicks we're able to apply formatting that makes it even easier to obtain useful information about our business performance that will now allow us to provide well informed advise and make well informed decisions.