THE UNIVERSITY of ADELAIDE

Mastering Excel Pivot Tables

Video transcript: Create a pivot chart from a PivotTable

Whilst we can create a Pivot Chart directly from an Excel data source just as easily as we can create a PivotTable, if the Pivot Table has already been created, with all of the custom calculations, comparisons and analysis - we may as well create the chart directly from the Pivot Table.

With the PivotTable selected, go to the PivotTable Analyze ribbon tab and from the Tools group, select PivotChart.

A dialog box will ask for selection of the chart type.

Scroll down the left side of the dialog box for all of the chart type groups. As we click each group, the right side of the box is updated with each chart type within each group.

Select Column and we can choose from Clustered Column, Stacked Column, 100% Stacked Column, 3D Clustered Column, 3D Stacked Column, 3D 100% Stacked Column or 3D Columns.

Select Line on the left and click on each of the options in the line group for a preview (line, stacked line, 100% stacked line, line with markers, stacked line with markers, 100% stacked line with markers and 3D line.

Do the same with each of the groups:

- Pie
- Bar
- Area
- Surface
- Radar

Unfortunately not all chart types are available with Pivot Charts. Notice as you click on each of these:

- Scatter Plot
- Map
- Stock
- Treemap
- Sunburst
- Histogram
- Box & Whisker
- Waterfall
- Funnel

The right side pane advises that you can't create this chart type with data inside a pivot table.

Never mind, the ones we can use are more than enough.

Which chart type should we use?

Well, that depends entirely upon the data being presented or compared.

A pie chart works well with one-dimensional data - that is a list: one row or one column of data, where each data point is shown as a percentage of the whole pie, but it won't accurately present 2-dimensional data (a table with multiple rows and multiple columns).

Column charts and bar charts are great for comparing the results of multiple categories on the same axis

The 100% stacked charts (bar and column) present percentages, similar to having multiple pie charts, stretched into columns or bars, laid out side by side.

Line charts are perfect for depicting linear progression, or results over time.

Radar charts, or spider charts, are used for depicting multi-dimensional data to compare 2 or more variables in a 2-dimensional chart.

So it's really up to you and your data as to which chart type you should use.

Because our PivotTable is summarising the data per date range, we'll select a line chart.

There are multiple line charts to choose from:

- A Line chart (or a line with markers) will depict each series as separate lines on the vertical axis - it makes it really easy to compare each series on the horizontal axis
- A stacked line (or a stacked line with markers) adds the value of the previous line each time, depicting the total of all series added together on the vertical axis, but making it harder to see the value of each series idnividually
- A 100% stacked line, or a 100% stacked line with markers, shows the percentage of each series (rather than the value of each series) on the horizontal axis
- The 3D line chart displays the line chart as a 3-dimensional object. It is pretty, but I do think the 3D charts are harder to read than the 2D charts, so we'll stick with 2D.

As we'd ideally like to draw attention to the number of corrective actions for each division, select either a line chart or a line chart with markers.

Perfect. We can easily see that after peaking in 2019, the number of Corrective Actions reported is trending downward for all divisions.