Course CB08

Organize and Analyze Data With Tables and Pivot Tables

by

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Organize and Analyze Data With Tables and Pivot Tables

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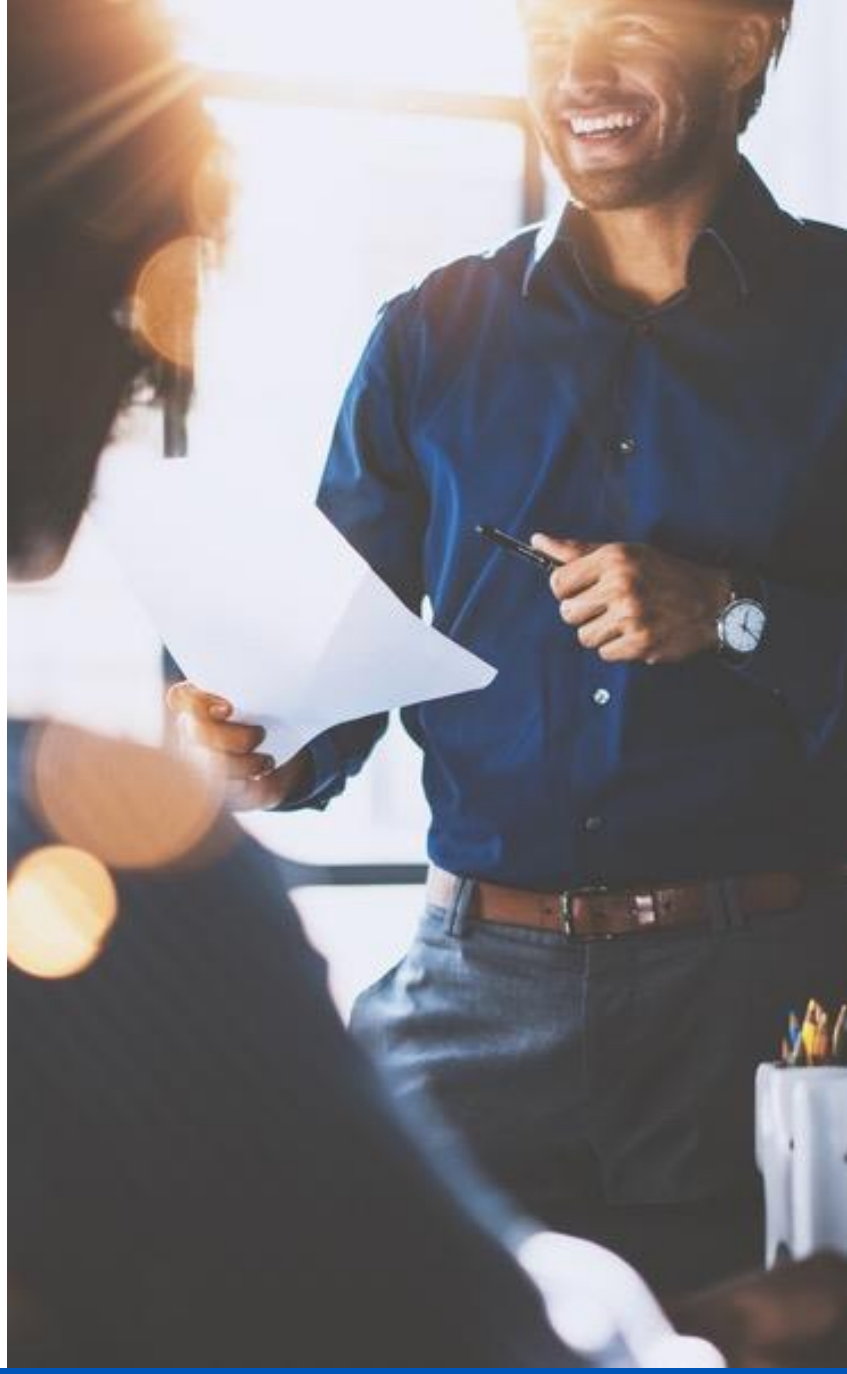
Objectives

- Analyze and subtotal data contained in an Excel dataset with filtering and subtotaling
- Summarize business data with PivotTables
- Manipulate a PivotTable to examine data



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Analyzing Data

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Interrogating Excel Lists

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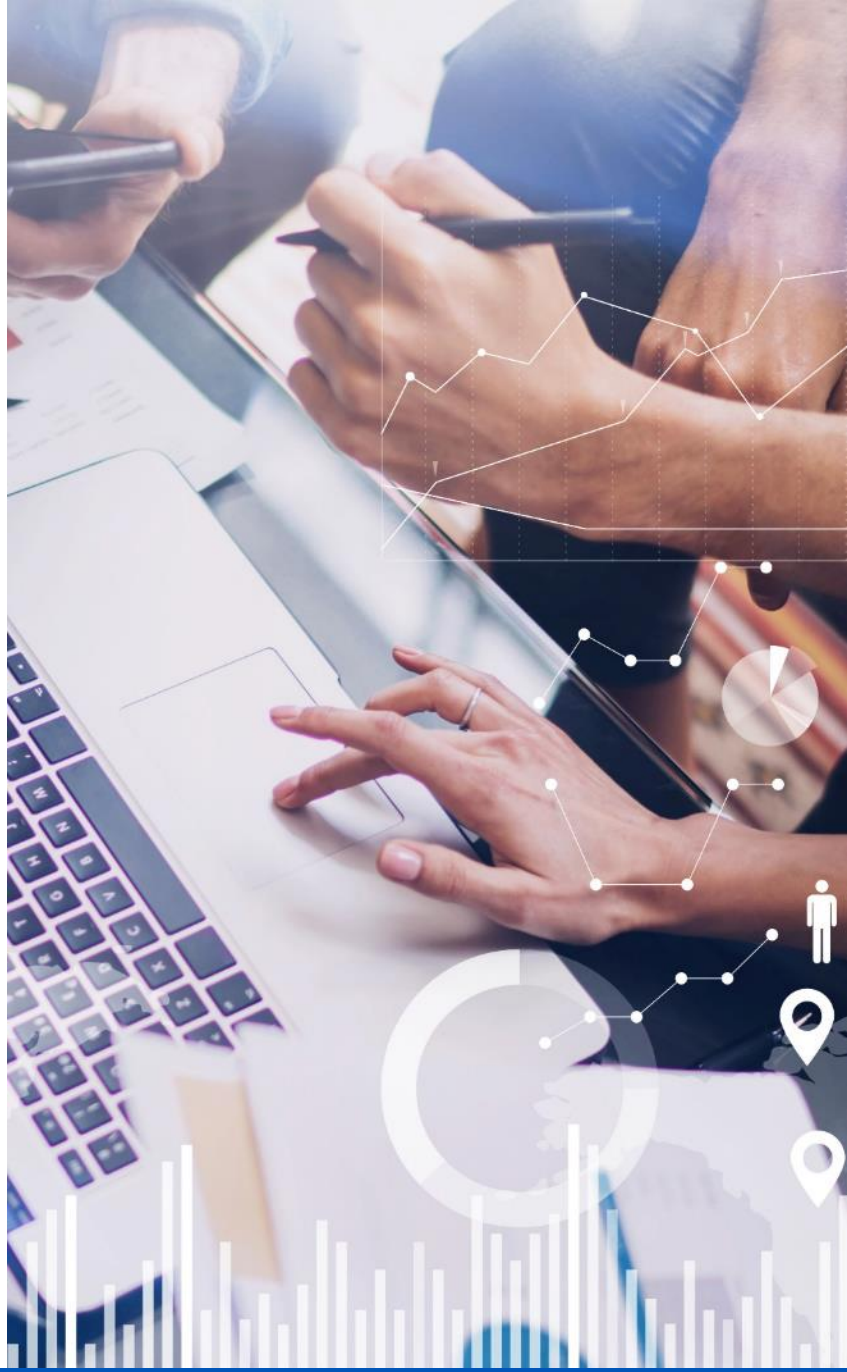
- Hands-On Exercise 1.1
- Analyzing Data With PivotTables
- Hands-On Exercise 1.2



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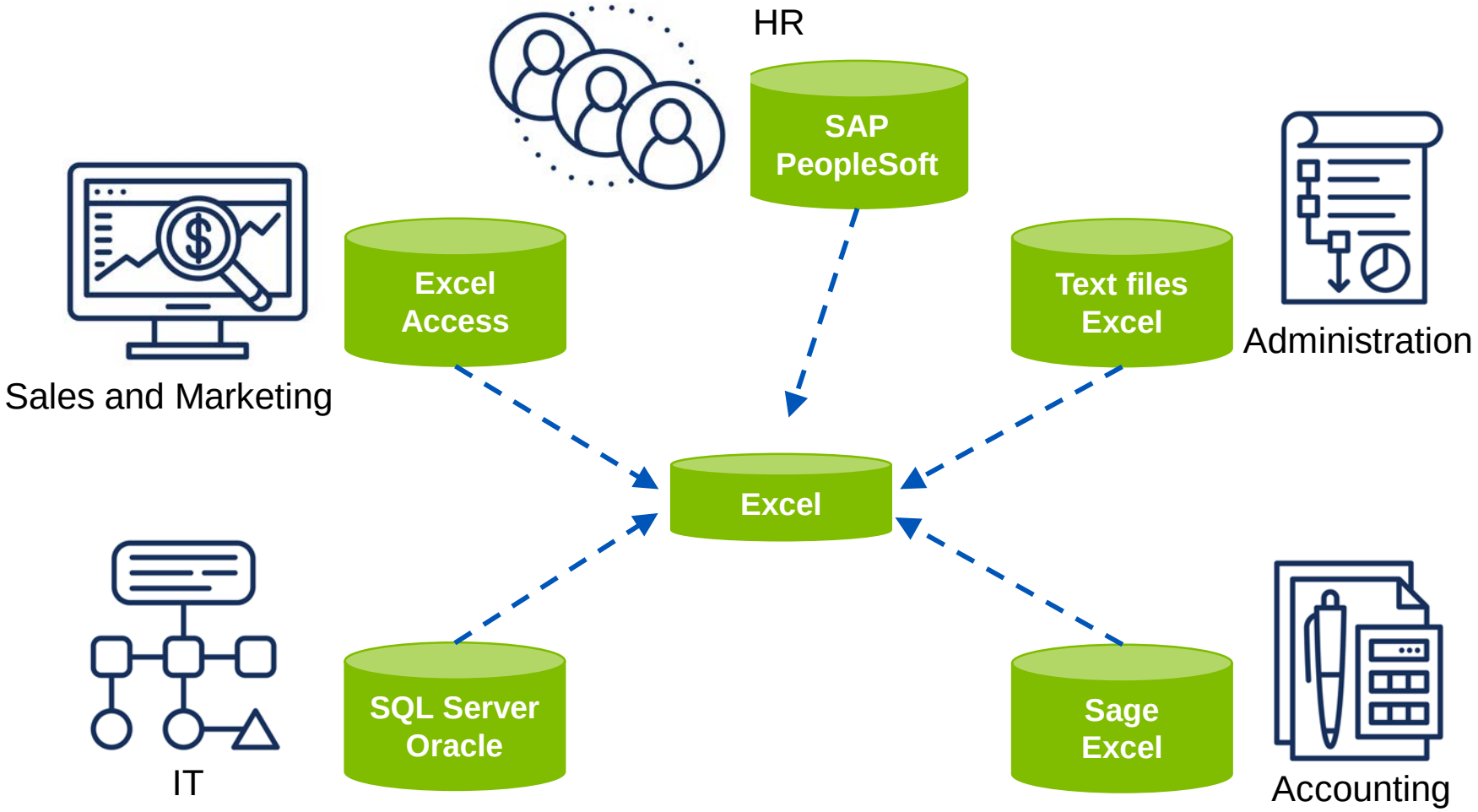
How Is Your Data Stored?



IT = information technology
SQL = structured query language

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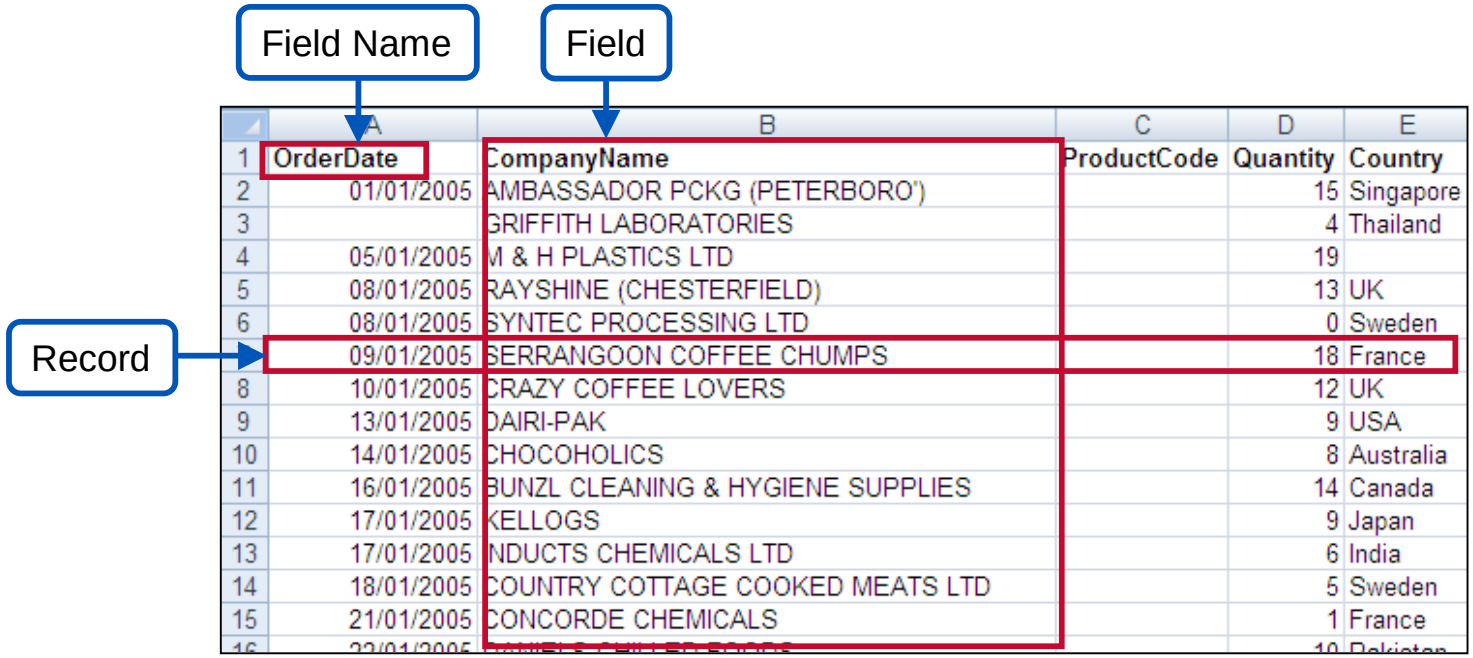
What Are Excel Lists (Datasets)?

- **Flat-file databases**
  - Columns are fields and the top row has field names
  - Rows are records
- **Contiguous with no breaks in either columns or rows**
  - IntelliSense can correctly identify the boundaries of your dataset when one cell is selected



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Sorting and Filtering Range of Data

- **Notice the tables below. Which one is a suitable data source?**

	A	B	C	D	E
1	Title		DateOut	AmountPaid	Category
2					
3	Spirited Away		12/31/2010	2.50	Animated
4	Not a movie that is seen very often				
5	Spirited Away - the children's version		virginia	2.50	Children's
6	Sahara		Jesse	war movie	29.5
7					

	A	B	C	D
8	Title	DateOut	AmountPaid	Category
9	There Will Be Blood	12/30/2010	2.50	Adventure
10	Avatar	12/30/2010	2.50	Animated
11	Five Easy Pieces	12/30/2010	2.50	Drama
12	There Will Be Blood	12/30/2010	2.50	Drama
13	Unforgiven	12/30/2010	2.50	Drama
14	Avatar	12/30/2010	2.50	Fantasy
15	What the Bleep Do We Know!?	12/30/2010	2.50	Mystery

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Overview on Types of Dataset Analysis

- **Excel analyzes datasets with**
  - Filtering
    - Lets you examine a subset of data
    - Either use AutoFilter or Advanced Filter
  - Subtotaling
    - Calculates subtotals and grand totals depending on changes in a specified field
  - PivotTables
    - Interactive table that lets you summarize and query data
    - Can analyze data from relational databases

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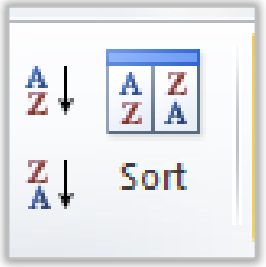
Sorting the Data

- **Organize your data quickly by sorting it**
  - Excel provides 64 levels of sort
  - Sort reorders the data according to a particular field(s)
  - Add a level for a secondary sort



- **Steps**
  - Click a cell that is within the range of contiguous data
  - If the data is contiguous, Excel will find the edges of the range (called IntelliSense)
  - Select **Data | Sort & Filter | Sort**
  - Select the field to sort by, the type of sort, and direction. Also, indicate that the range has headers
  - Click **OK**

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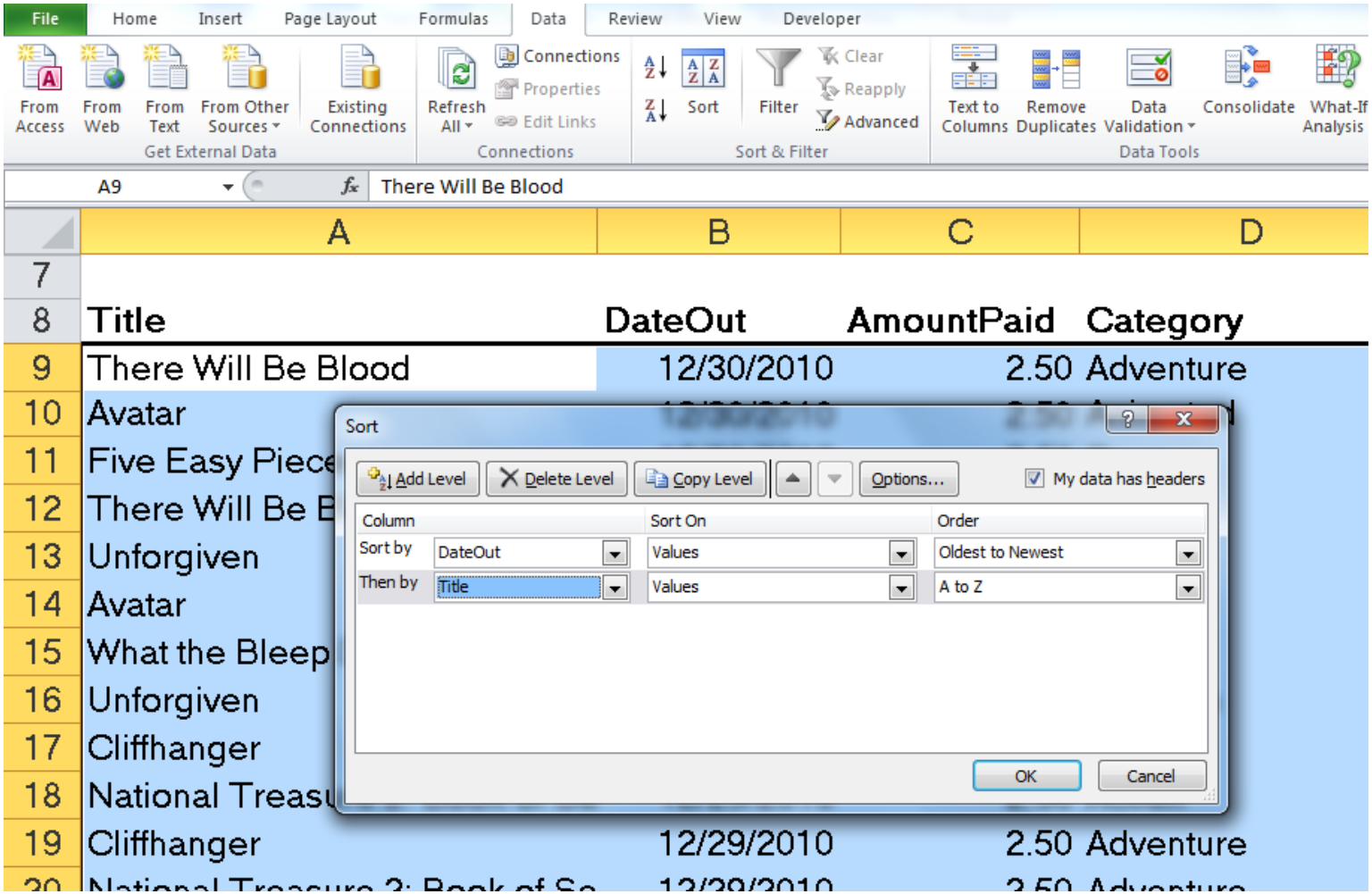
Sort Dialog



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AutoFilter

- **AutoFilter can be turned on for a contiguous range of data**
  - Click a cell within a contiguous range of data
  - Select **Data | Sort & Filter | Filter** button

- **Filter buttons appear in the header row on each column**
  - Click the icon for a particular column to select criteria
    - Can also sort
  - Icon at top changes, identifying filter

Status	Icon
No filter	
Sort ascending/descending	
Filtered/filtered with sort	

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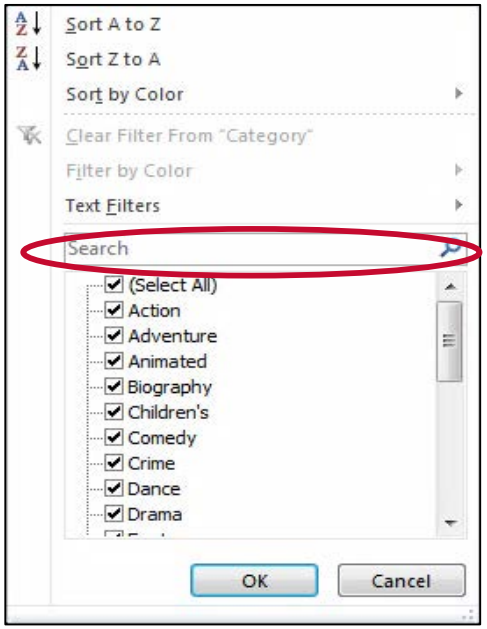
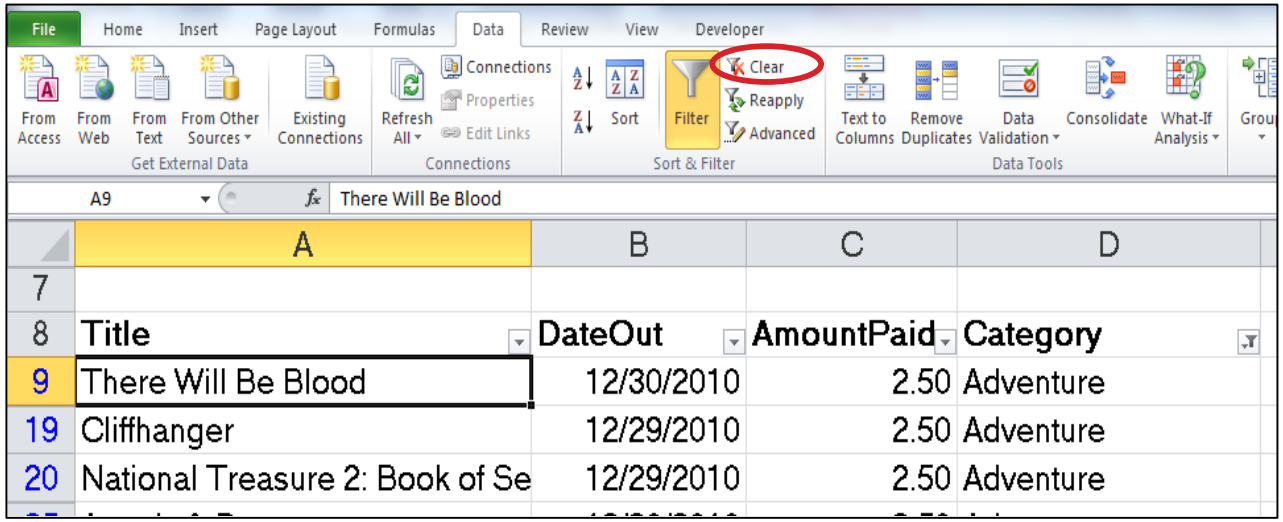
Filtering an Excel Recordset

- **Click on a drop down to enter criterion for a column**
  - Type a value in the search box *or*
  - Click the desired checkboxes
  - Click **OK**
    - Excel returns a dataset of those records that meet the criteria
- **Select Data | Sort & Filter | Clear to show all records again**





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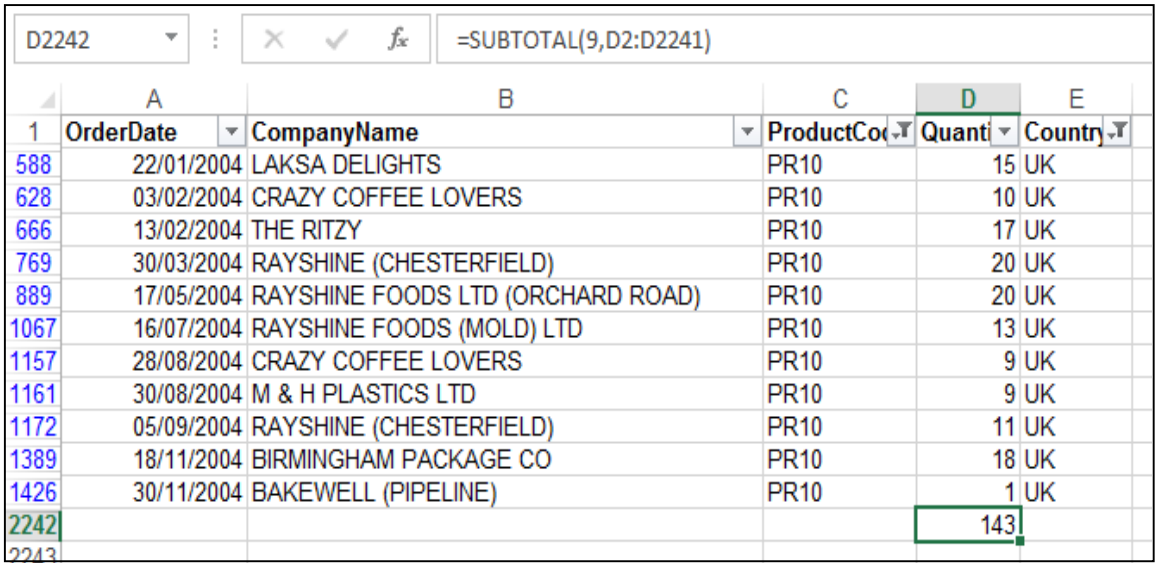
Subtotal Function With a Filtered Dataset

- **Subtotal a column with filters**
  - Use AutoSum tool
  - Applies the `SUBTOTAL()` function
  - Sums up visible records

- **`SUBTOTAL(function_num,ref1)`**
  - `function_num` = value that specifies function to apply `ref1` = reference to the entire field



	A	B	C	D	E
1	OrderDate	CompanyName	ProductCo	Quanti	Country
588	22/01/2004	LAKSA DELIGHTS	PR10	15	UK
628	03/02/2004	CRAZY COFFEE LOVERS	PR10	10	UK
666	13/02/2004	THE RITZY	PR10	17	UK
769	30/03/2004	RAYSHINE (CHESTERFIELD)	PR10	20	UK
889	17/05/2004	RAYSHINE FOODS LTD (ORCHARD ROAD)	PR10	20	UK
1067	16/07/2004	RAYSHINE FOODS (MOLD) LTD	PR10	13	UK
1157	28/08/2004	CRAZY COFFEE LOVERS	PR10	9	UK
1161	30/08/2004	M & H PLASTICS LTD	PR10	9	UK
1172	05/09/2004	RAYSHINE (CHESTERFIELD)	PR10	11	UK
1389	18/11/2004	BIRMINGHAM PACKAGE CO	PR10	18	UK
1426	30/11/2004	BAKEWELL (PIPELINE)	PR10	1	UK
2242				143	
2243					

Used with ranges	Used in tables	Function
1	101	AVERAGE
2	102	COUNT
3	103	COUNTA
4	104	MAX
5	105	MIN
6	106	PRODUCT
7	107	STDEV
8	108	STDEVP
9	109	SUM
10	110	VAR
11	111	VARP

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Sort, Select, and Subtotal a Range of Data

Do Now

1. Open the file `C:\CB08\01_AutoFilter.xlsx`
2. With the instructor try sorting and selecting information
3. Try out `SUBTOTAL` function with the filtered list

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Excel Tables

- **Tables are groups of associated data**
  - Usually have headers, with data below
  - Coordinates with SharePoint
- **Tables provide a database area in the spreadsheet**
  - Analyze groups of data
  - Sort and select data
  - Subtotal data at the end of a column with a Total row
    - Use drop-downs to define the function to be used

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Creating a New Table

- **Entering data in an Excel worksheet doesn't make it an Excel table**
  - You must insert a table from an existing range
- **Steps**
  - Click a cell in a contiguous range of data
  - Choose **Insert | Tables | Table**

  Or
  - Quick key <Ctrl><T>
  - Verify the table range
    - IntelliSense finds contiguous rows and columns
  - Specify whether the table has headers (column headings)
  - Click **OK**

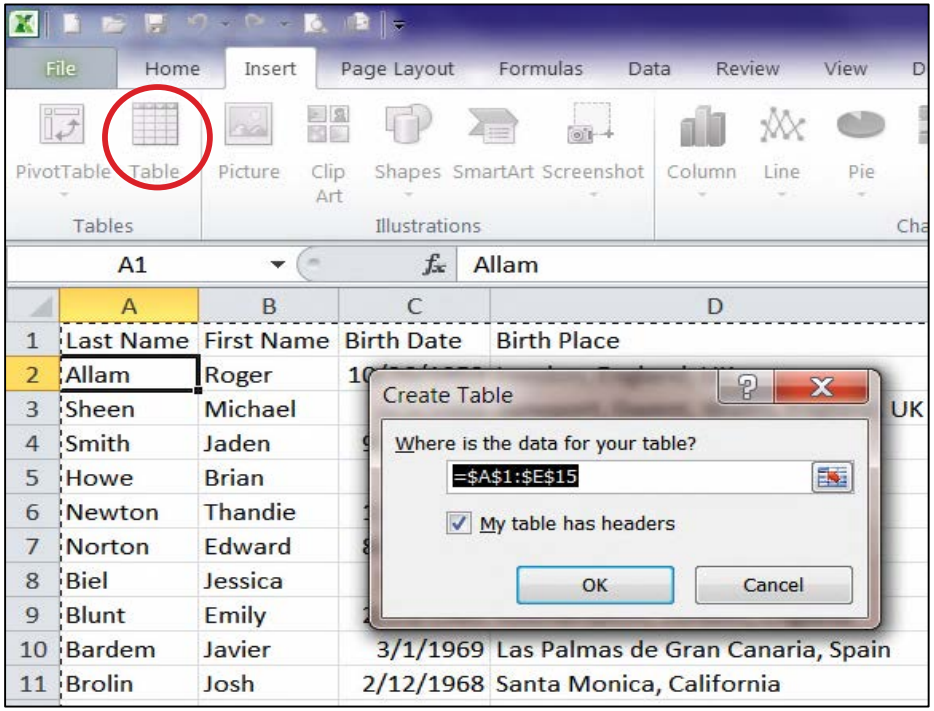

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Table Tools

- **Table tools appear when the active cell is in the table area**
  - Modify the table's design

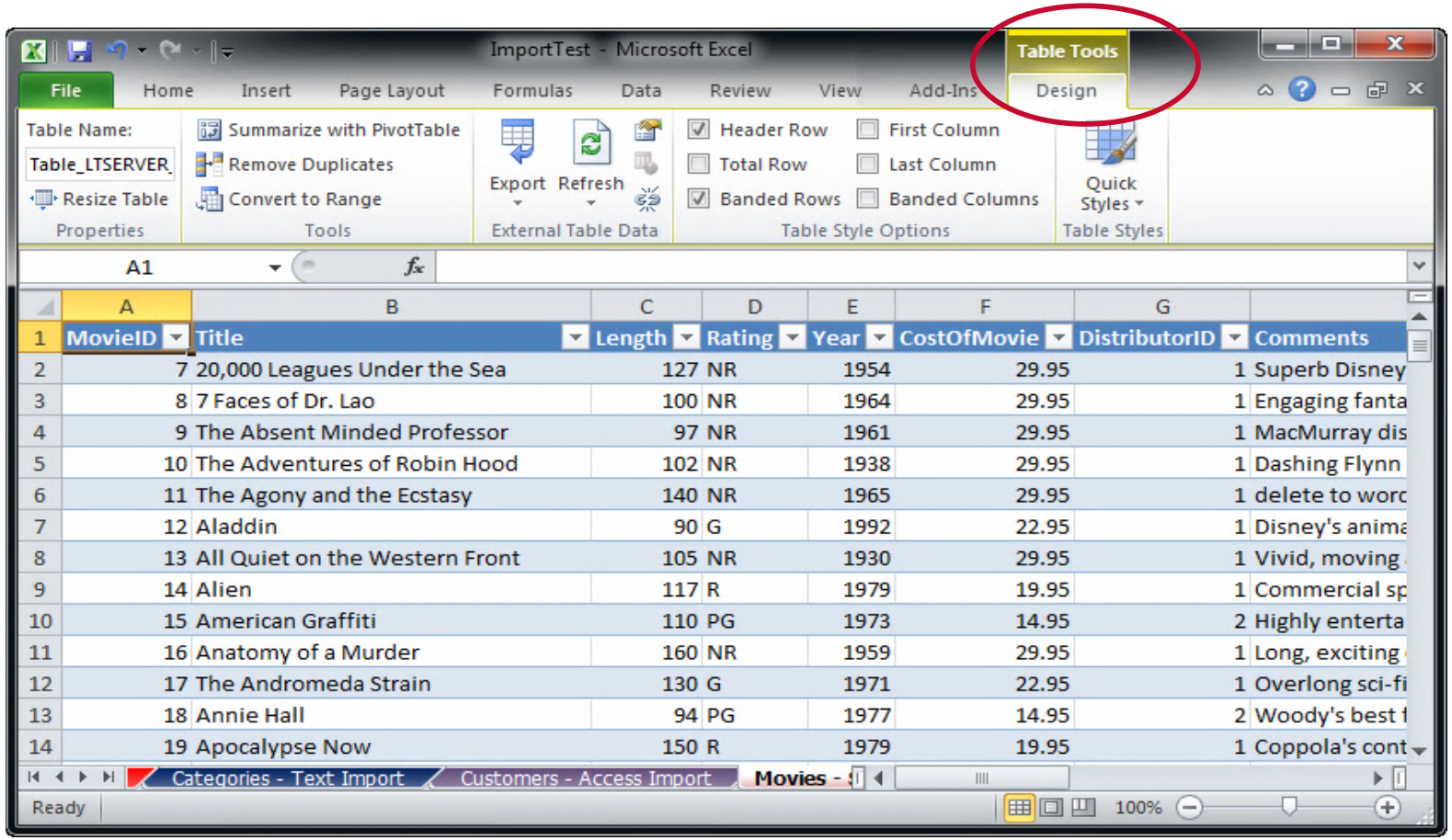

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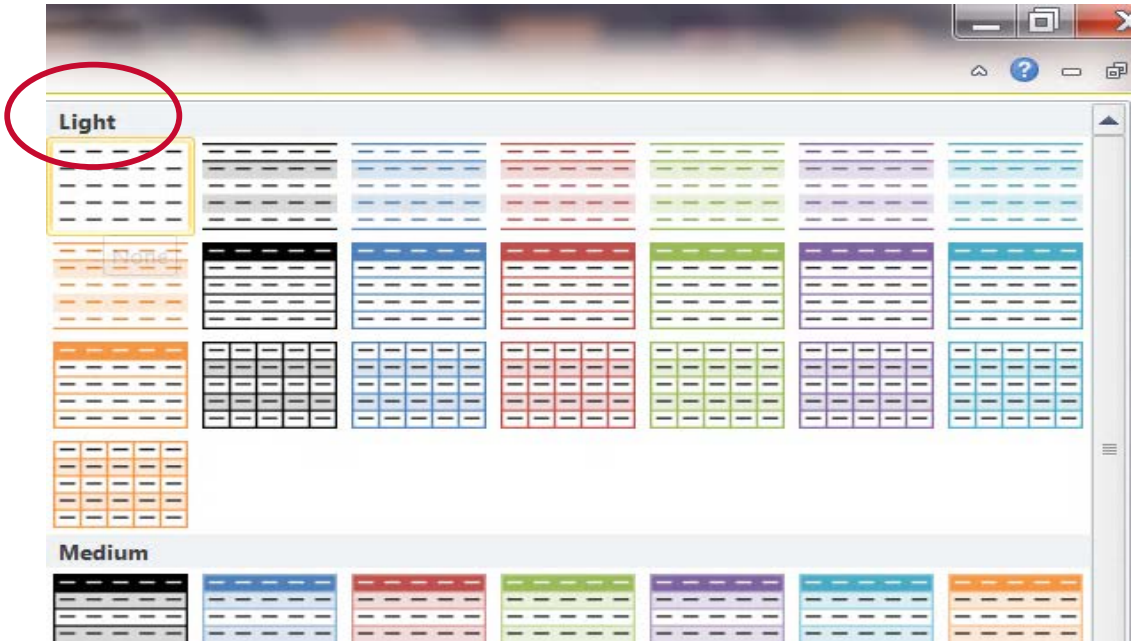
Table Styles

- **Excel automatically picks a table style after you insert a table**
- **Use the Table Tools | Design tab to**
  - Select a different table style
- **To choose no style, under the Light category, select None**



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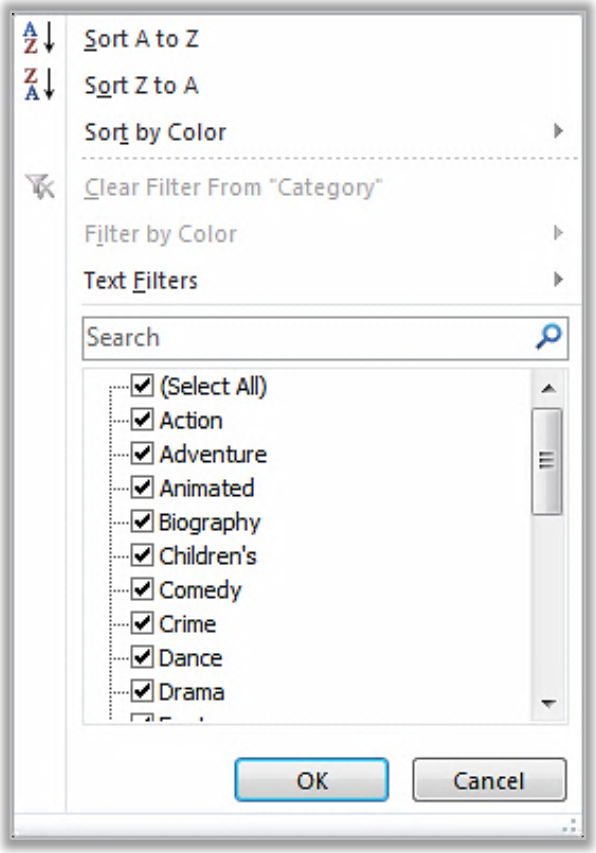
Sorting and Filtering Table Data

- **Similar to the AutoFilter, table data can be easily sorted and filtered**
  - Filter buttons turn on by default after you insert a table
  - Can turn them off by selecting **Data | Sort & Filter | Filter** button
- **Select column header drop-down**
  - Choose sort order
  - Filter by selecting which data to see
- **Icon at top of column changes, identifying filter**

Status	Icon
No filter	
Sort ascending/descending	
Filtered/filtered with sort	



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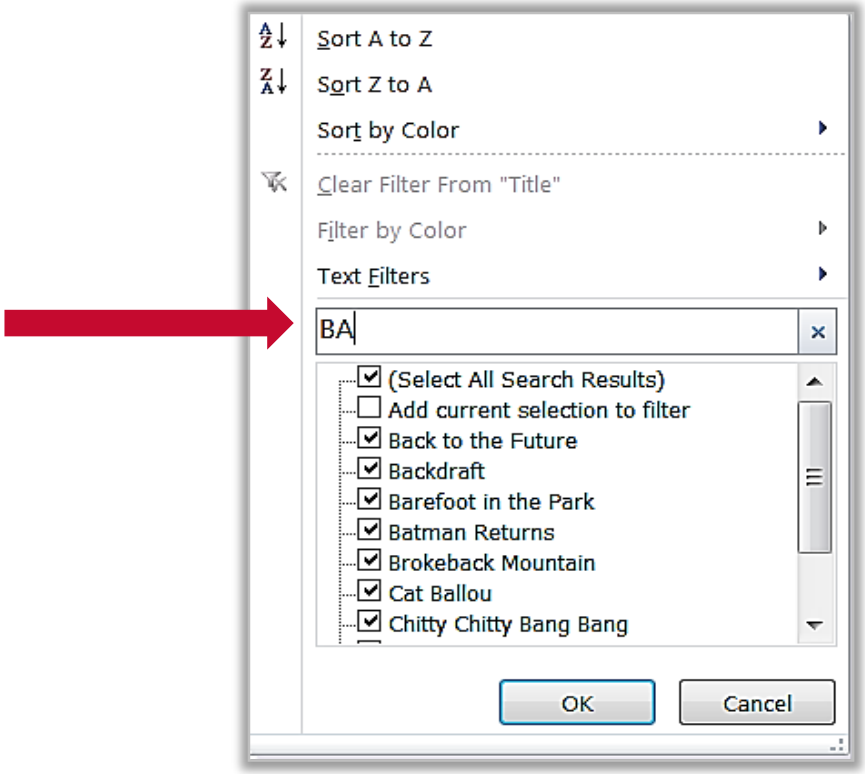
Search: Filter the Choices With the Search Box

- Large datasets can produce many filter choices
- Narrow the choice by using the Search option
- Available for both the table and the AutoFilter



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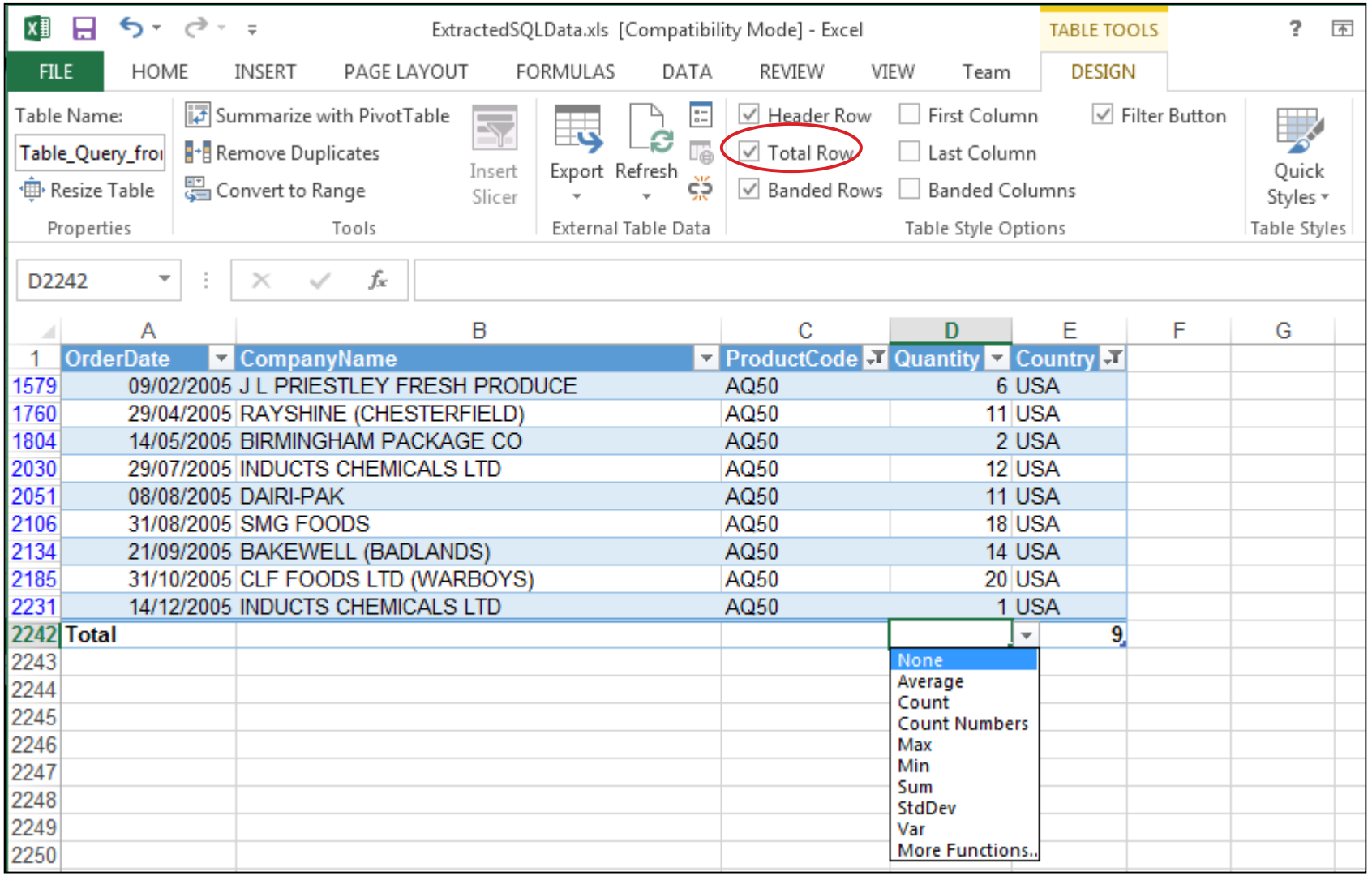
Add Subtotals—Turn on the Total Row



	A	B	C	D	E	F	G
1	OrderDate	CompanyName	ProductCode	Quantity	Country		
1579	09/02/2005	J L PRIESTLEY FRESH PRODUCE	AQ50	6	USA		
1760	29/04/2005	RAYSHINE (CHESTERFIELD)	AQ50	11	USA		
1804	14/05/2005	BIRMINGHAM PACKAGE CO	AQ50	2	USA		
2030	29/07/2005	INDUCTS CHEMICALS LTD	AQ50	12	USA		
2051	08/08/2005	DAIRI-PAK	AQ50	11	USA		
2106	31/08/2005	SMG FOODS	AQ50	18	USA		
2134	21/09/2005	BAKEWELL (BADLANDS)	AQ50	14	USA		
2185	31/10/2005	CLF FOODS LTD (WARBOYS)	AQ50	20	USA		
2231	14/12/2005	INDUCTS CHEMICALS LTD	AQ50	1	USA		
2242	Total				9		
2243							
2244							
2245							
2246							
2247							
2248							
2249							
2250							

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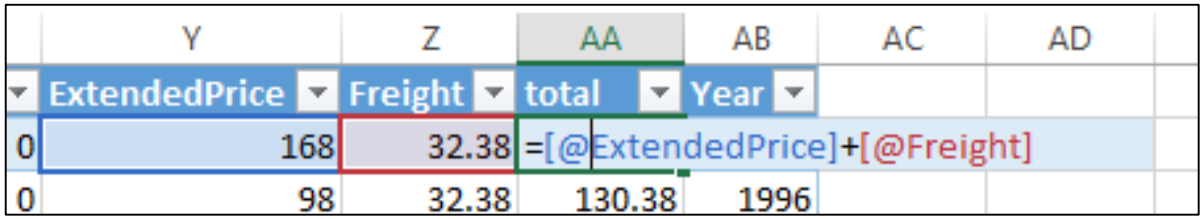
Managing Tables of Data

- **Add Columns with Formulas**
  - Table has its own Formula Writing, copies formulas down



- **Insert a row in a table without affecting other datasets on the worksheet**
  - Home | Cells | Insert Table Rows Above (or Below)

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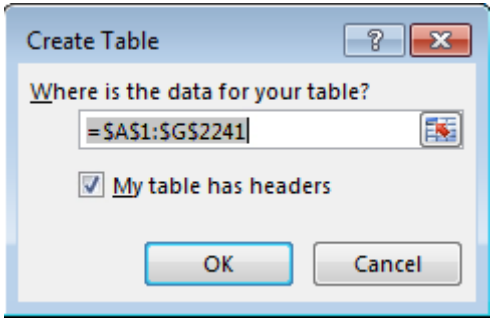
Create a Table

Do Now

1. **Open the file `C:\CB08\02_Create_a_Table.xlsx`**
   - Verify that the active cell is A1
   - Click on Insert | Tables |Table
   - Click on OK to accept the parameters in the Create Table Dialog



2. **With your instructor**
   - Examine the color schemes for the table
   - Pick all records where the country is India and the product code is AQ10
   - Remove filters
   - Add a column to the end of the table
   - Create a revenue column that multiples Quantity * Price
   - Turn on the totals row
   - Add a new row to the bottom of the table

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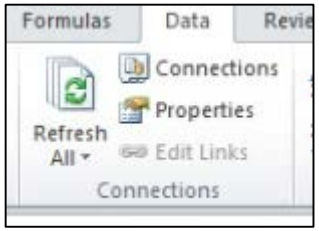
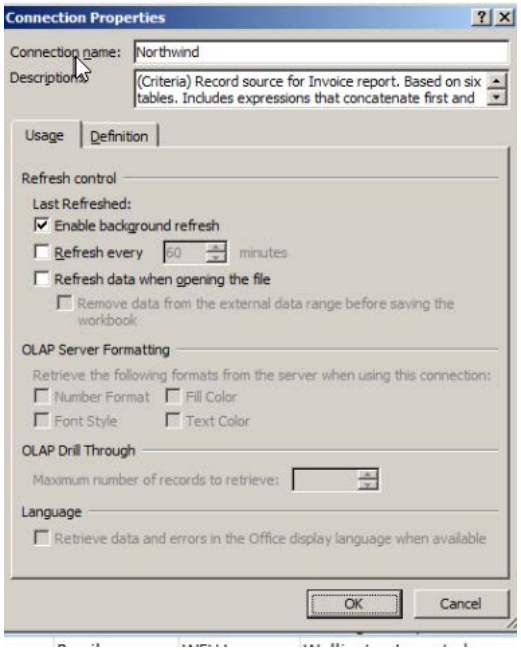
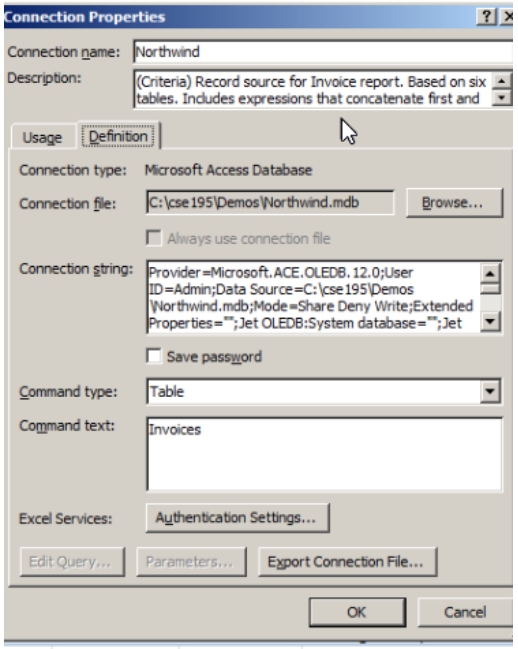
Connect to External Data

- **Connect to External Data**
  - Data | Get External Data
- **See and manage connections**
  - Data | Connections | Properties
  - Use Connection over again
- **Usage**
  - Configure how the data in the workbook is refreshed
  - Configure the server format
- **Definition**
  - Authentication settings
  - Data Source







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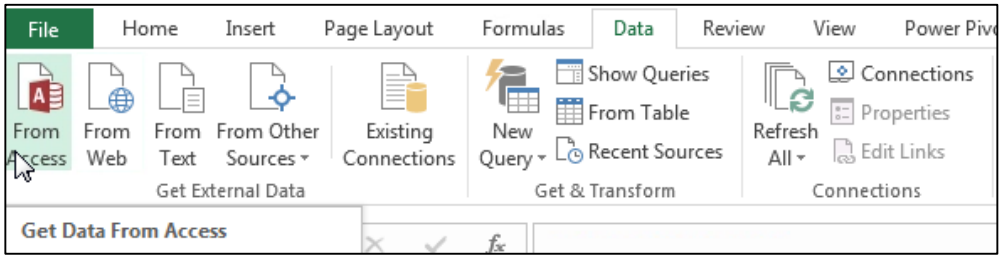
Connect to External Data

Do Now

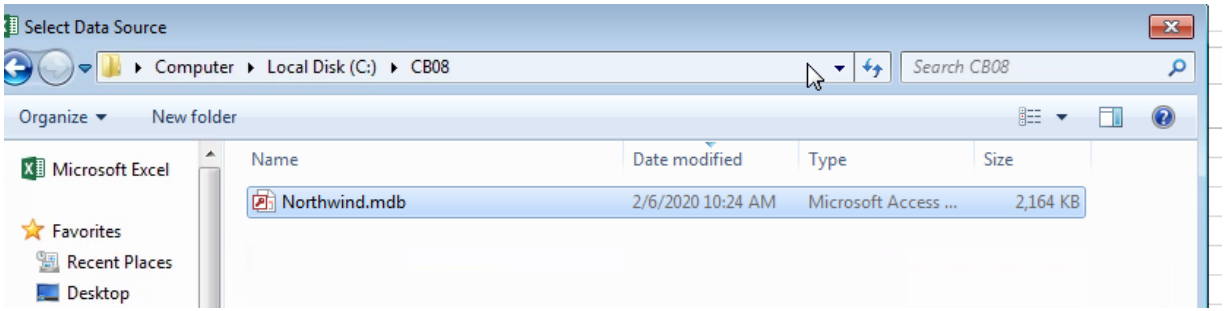
1. **Use the same file from the previous exercise**
   - Click on the + next to the worksheet tab to create a new worksheet

   - Call the new sheet Access File

2. **Click on Data | Get External Data | From Access**



3. **Navigate to `C:\CB08\Northwind.mdb` then click on Open**



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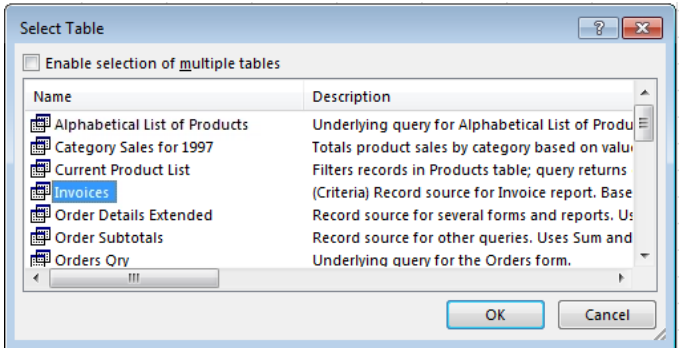
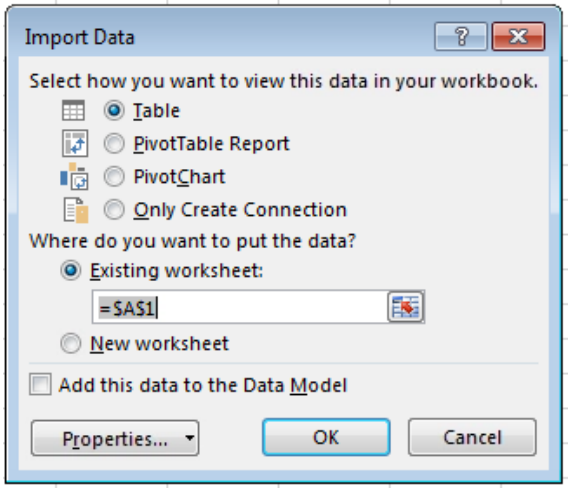
Connect to External Data (Continued)

Do Now

4. From the Select Table dialog click on Invoices then click on OK



5. Verify from the Import Data screen that you are viewing the data in a table, putting the data in A1



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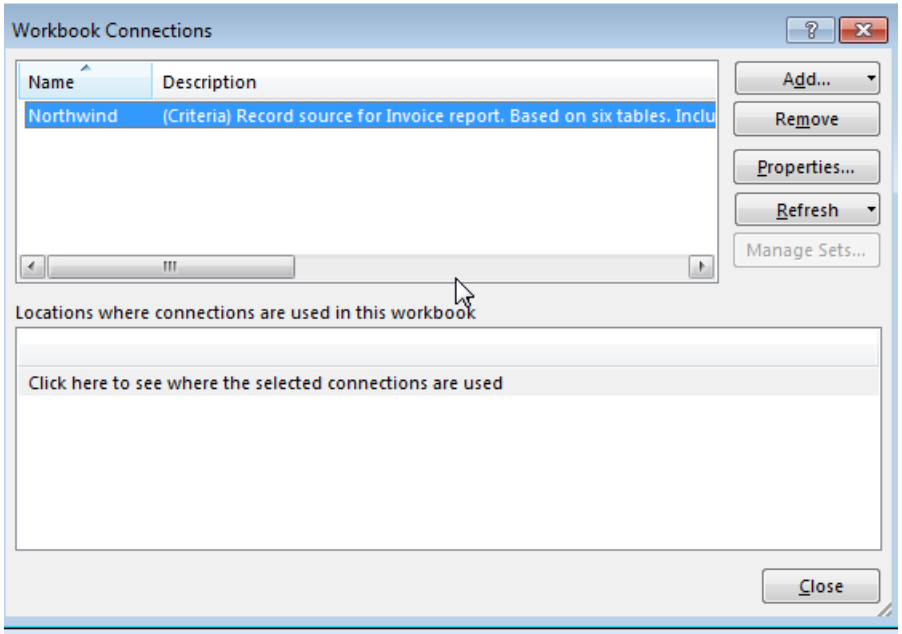
Connect to External Data (Continued)

Do Now

6. Click on Data | Connections | Connections to view the connection



7. With your instructor, investigate the Properties window

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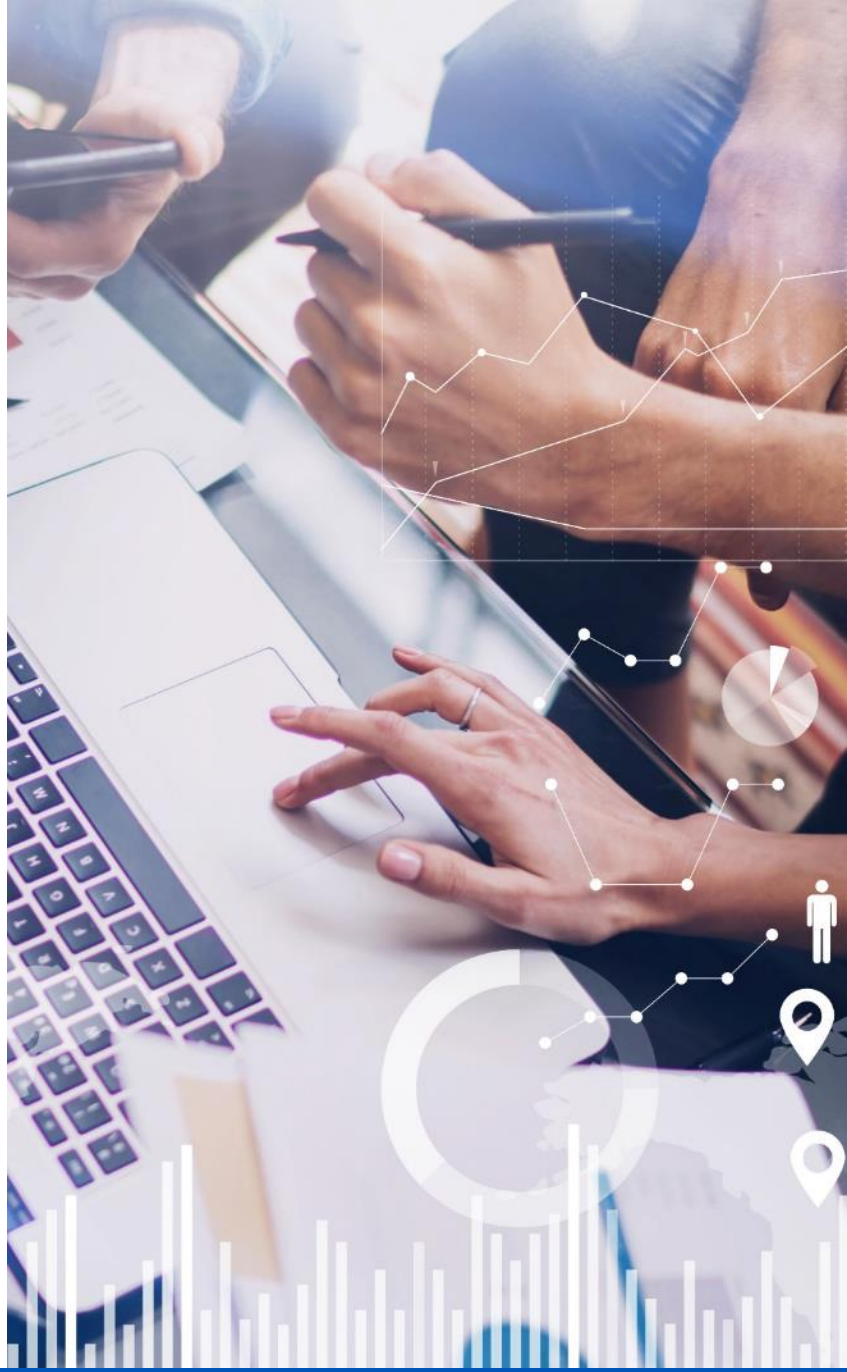
- Analyzing Data With PivotTables
- Hands-On Exercise 1.2



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Database Analysis

- **Analyze large datasets such as relational databases with**
  - PivotTables
    - Interactive table to combine and compare datasets
    - Report on multiple related tables in Excel
  - PowerPivots (2010/2013)
    - Build multidimensional cubes
      - Hierarchical views of data
    - Report on data from different sources
  - Power Views (2013)
    - Visual interpretation of data
      - Could be multidimensional data

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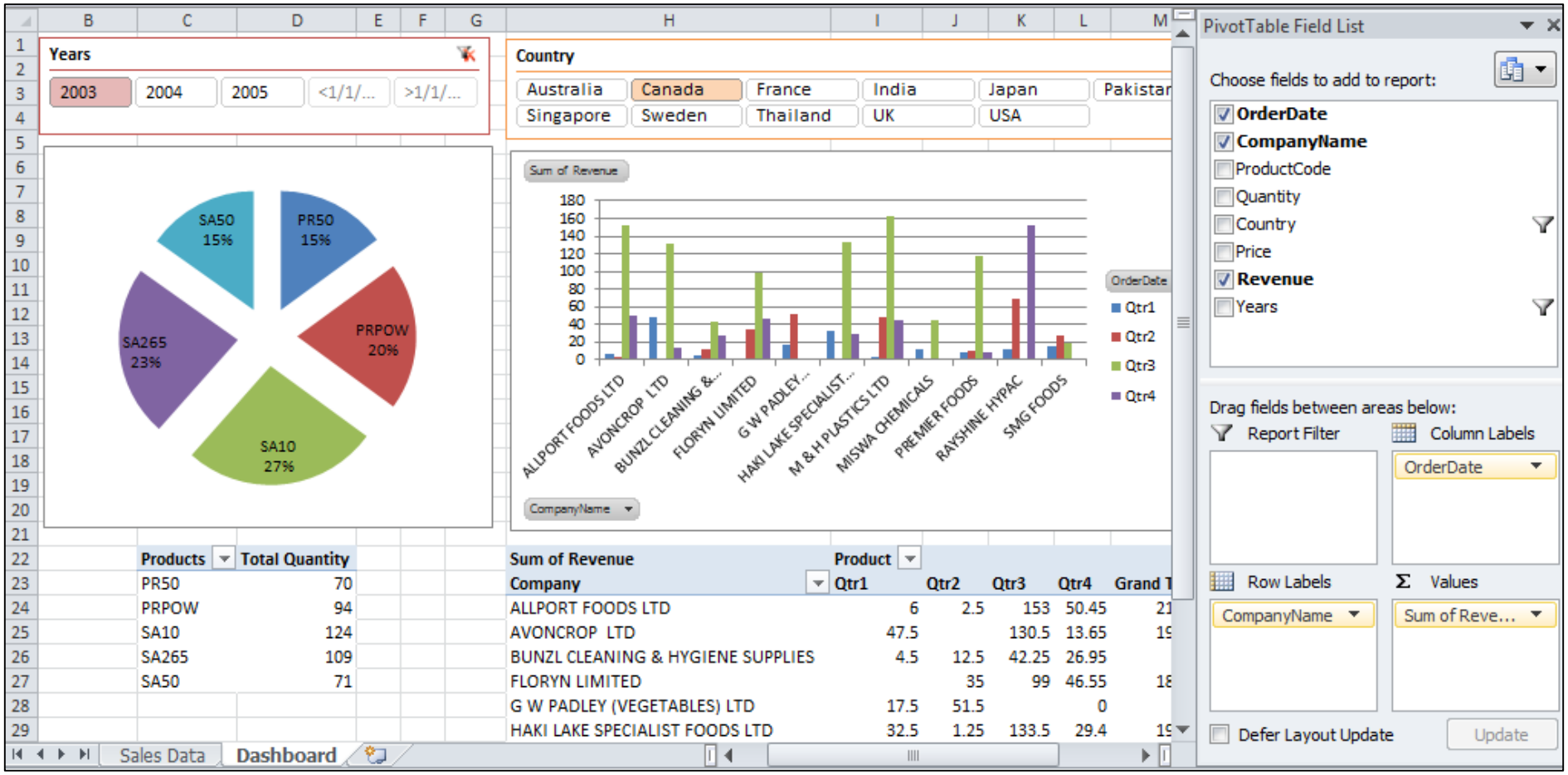
PivotTables and PivotCharts



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PivotTables and PivotCharts

- **A PivotTable is an interactive table**
  - Summarizes large amounts of data
  - Allows viewing and manipulating data in a variety of ways
    - Can rotate rows and columns
- **A PivotChart is the graphical representation of a PivotTable**
  - Calculates totals from a long dataset of figures
  - Compares multiple facts about each summary total
- **Excel 2010/2013 introduced further features to aid dashboard creation**
  - Slicer
  - Sparklines

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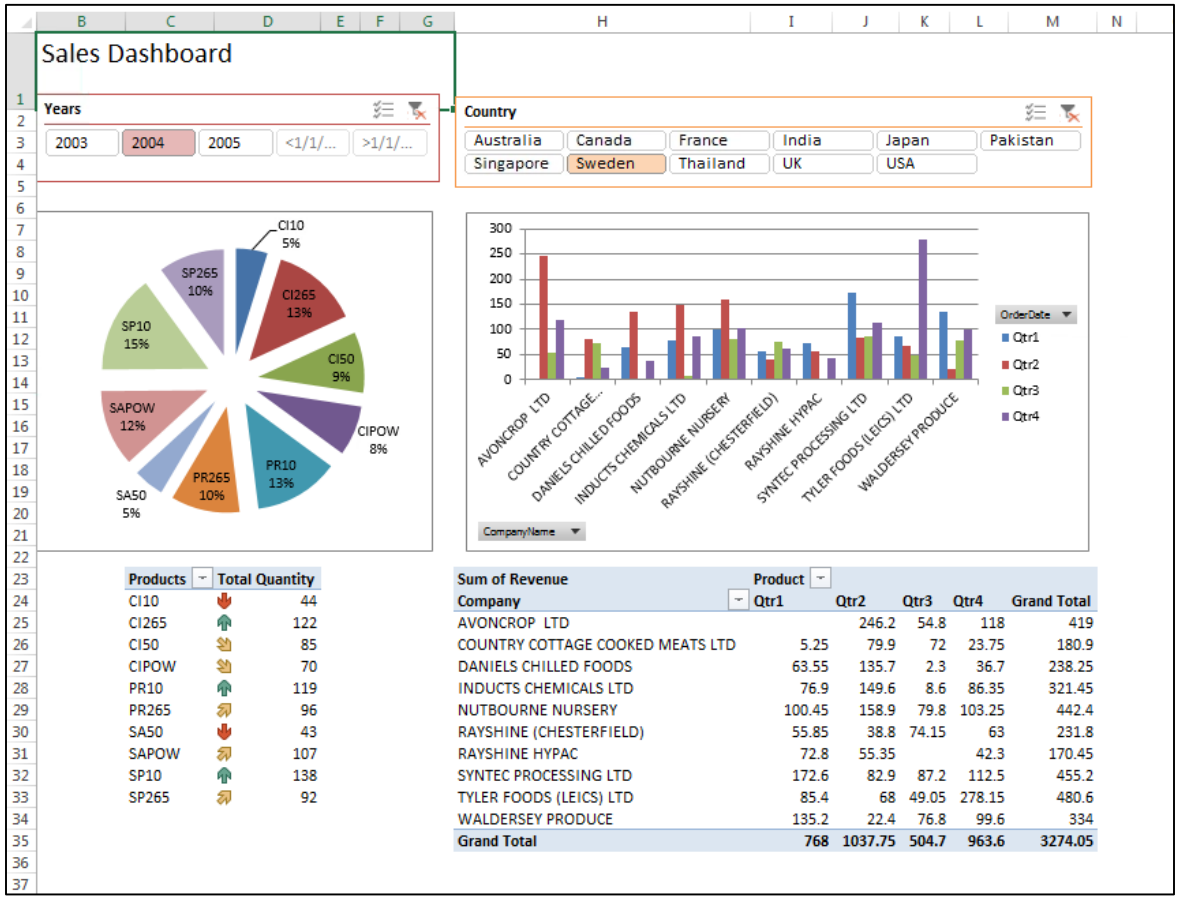
Try Out a Pivot Table Dashboard

Do Now

- **Open the file `C:\CB08\03_Dashboard.xlsx`**
  - With your instructor, try out slicers
  - Observe pivot tables and pivot charts



Products	Total Quantity
CI10	44
CI265	122
CI50	85
CIPOW	70
PR10	119
PR265	96
SA50	43
SAPOW	107
SP10	138
SP265	92

Sum of Revenue	Product				
Company	Qtr1	Qtr2	Qtr3	Qtr4	Grand Total
AVONCROP LTD		246.2	54.8	118	419
COUNTRY COTTAGE COOKED MEATS LTD	5.25	79.9	72	23.75	180.9
DANIELS CHILLED FOODS	63.55	135.7	2.3	36.7	238.25
INDUCTS CHEMICALS LTD	76.9	149.6	8.6	86.35	321.45
NUTBOURNE NURSERY	100.45	158.9	79.8	103.25	442.4
RAYSHINE (CHESTERFIELD)	55.85	38.8	74.15	63	231.8
RAYSHINE HYPAC	72.8	55.35		42.3	170.45
SYNTEC PROCESSING LTD	172.6	82.9	87.2	112.5	455.2
TYLER FOODS (LEICS) LTD	85.4	68	49.05	278.15	480.6
WALDERSEY PRODUCE	135.2	22.4	76.8	99.6	334
Grand Total	**768**	**1037.75**	**504.7**	**963.6**	**3274.05**

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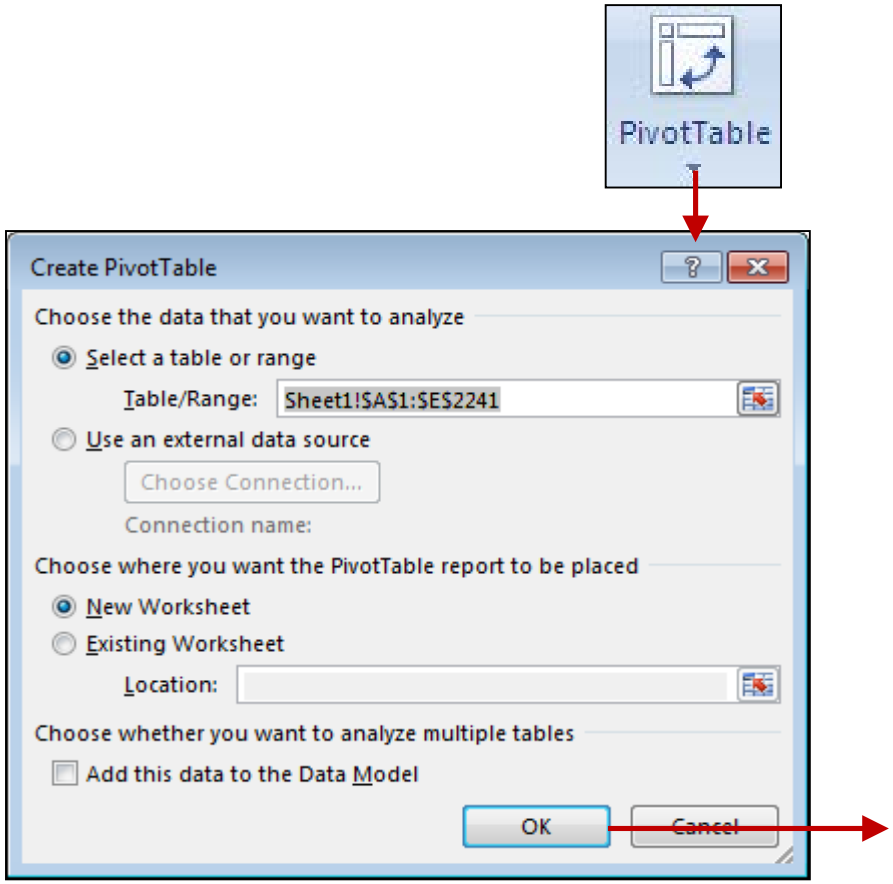
Creating a PivotTable

Demo

- **From the Ribbon, select Insert | PivotTable**
- **Data can come from**
  - Within the current workbook
  - An external data source
    - Text files
    - Excel files
    - Access files
    - SQL Server
    - Oracle



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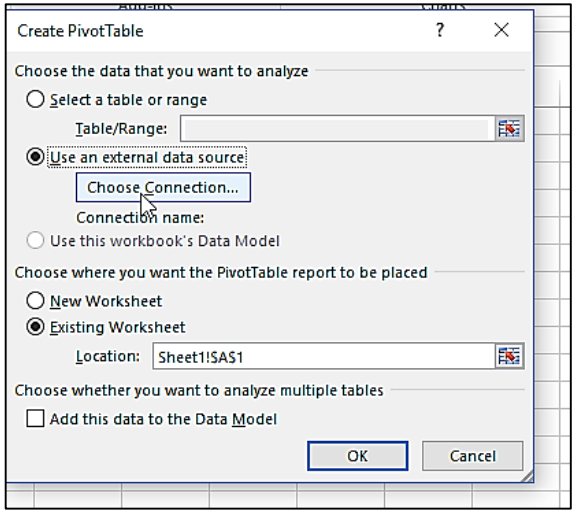
Steps to Connect to a Named Range—Worksheet File

1



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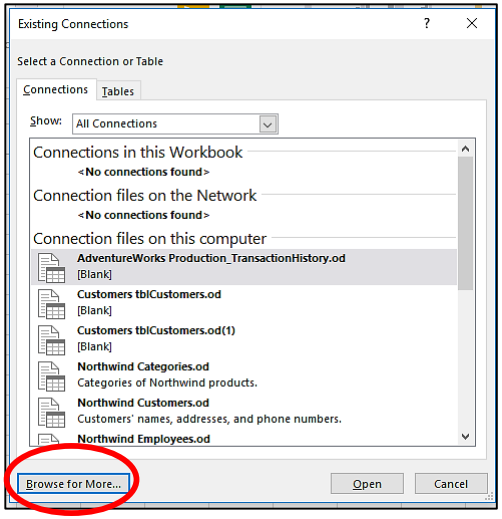

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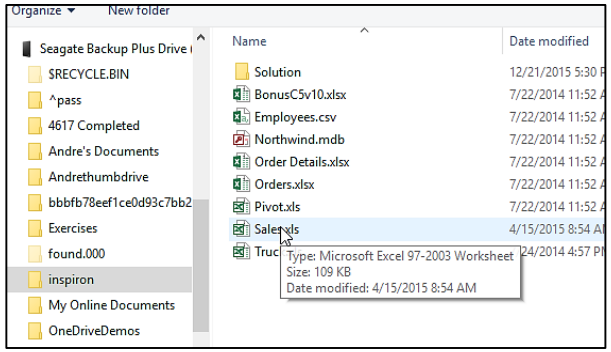

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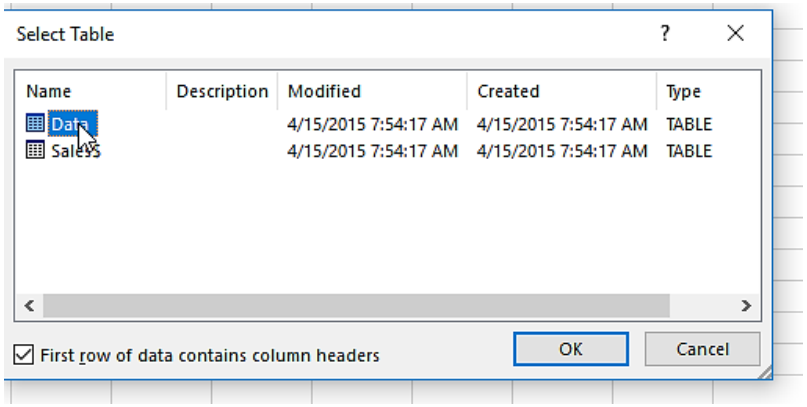

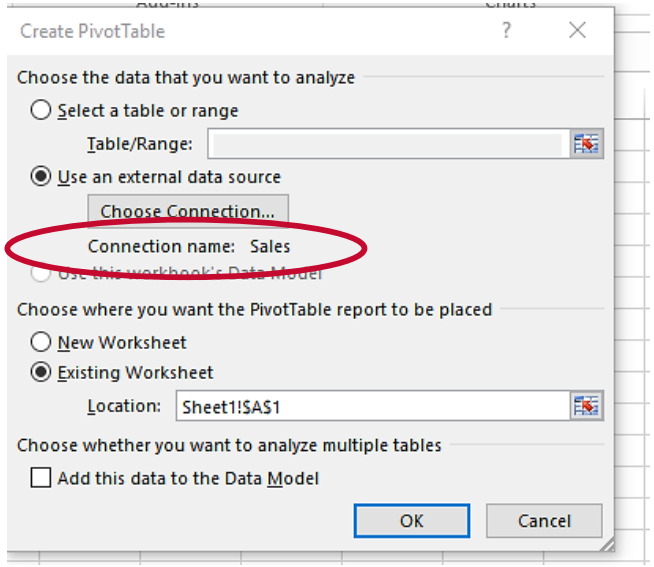

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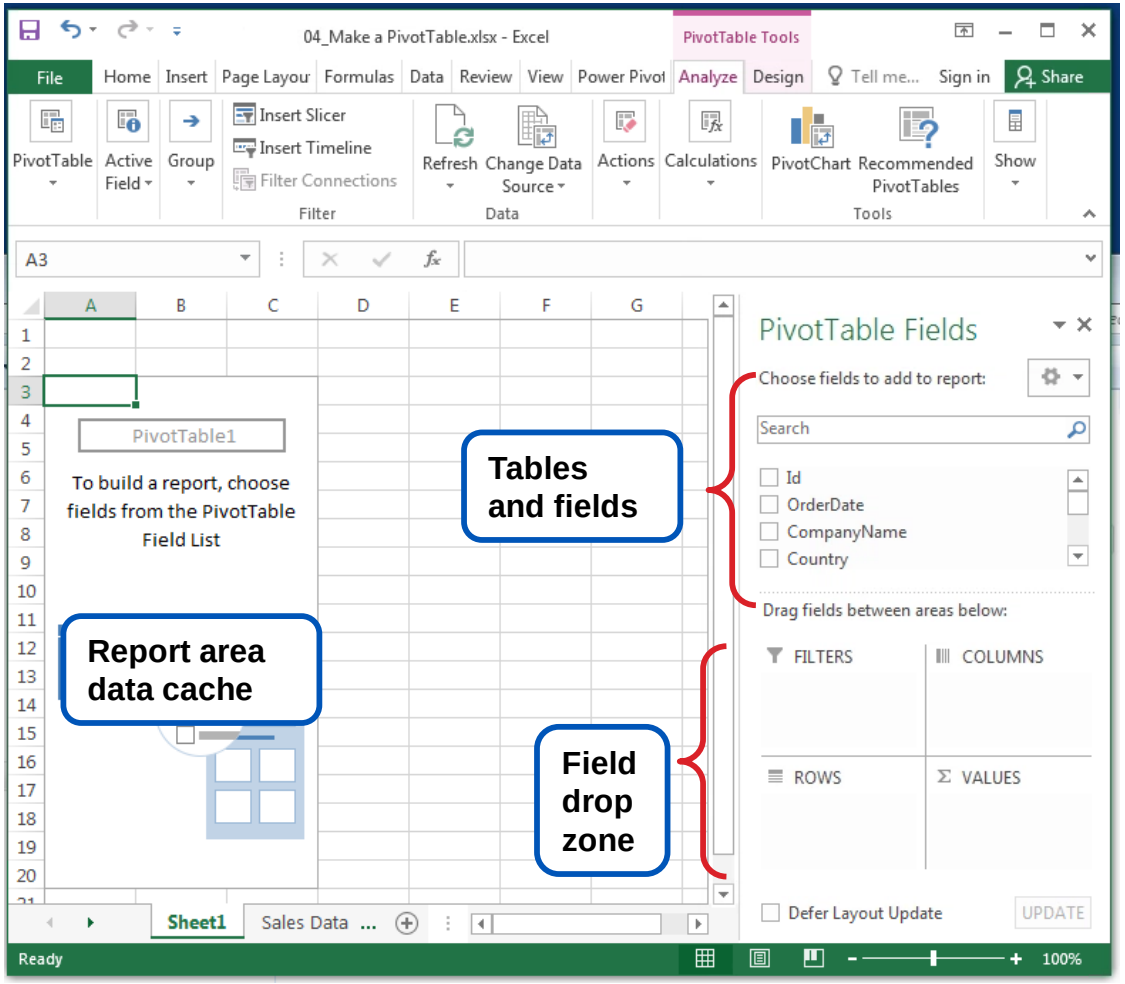
PivotTable Field List: Report and Field Areas

- **PivotTable creates a cache of data**
  - Places the data in memory
  - Report area represents the data
  - Active cell must be in the report area to work with the PivotTable
- **Column headers from data become PivotTable fields**
  - Drag fields into the Field drop zone area to build report

  OR
  - Click checkbox next to field
  - Right-click on field and choose the action



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Parts of the PivotTable

- **Table describes the different parts of the PivotTable**

Description	Area
Filters the report at the top level	Filters
Defines groups/categories of column headings	Columns
Defines groups/categories of row headings	Rows
Details being summarized	Values

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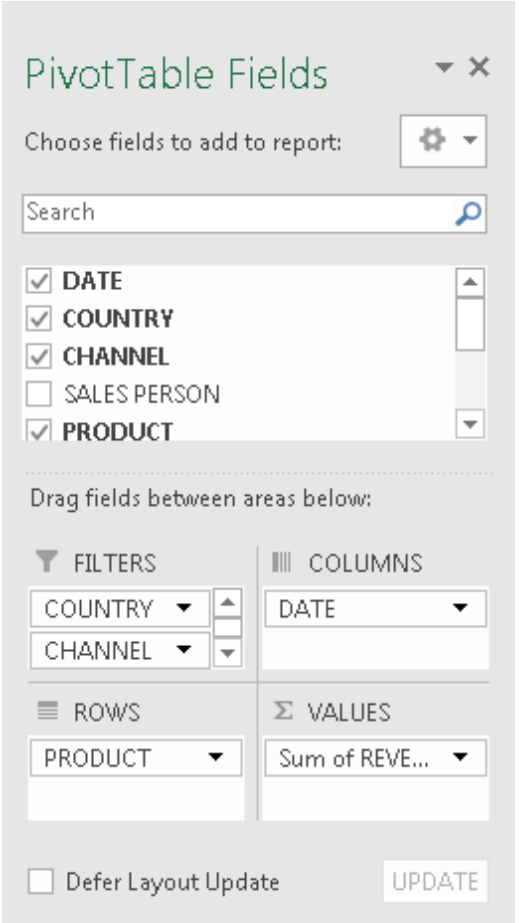
What Goes Where?

- **Depends on the question you want answered**
  - Example: How do I see the revenue per quarter for each product?

	A	B	C	D	E	F
1	COUNTRY	(All)				
2	CHANNEL	(All)				
3						
4	**Sum of REVENUES**	**DATE**				
5	**PRODUCT**	**Qtr1**	**Qtr2**	**Qtr3**	**Qtr4**	**Grand Total**
6	Aqua Aroma	372,116	60,445	57,757	45,206	535,524
7	CleanIt	14,145	1,950	13,530	29,745	59,370
8	Proven	36,715	21,797	31,867	28,622	119,001
9	Sanitize	57,135	69,538	72,162	47,936	246,771
10	Sparkle	17,775	14,400	16,875	9,900	58,950
11	**Grand Total**	**497,886**	**168,130**	**192,191**	**161,409**	**1,019,616**



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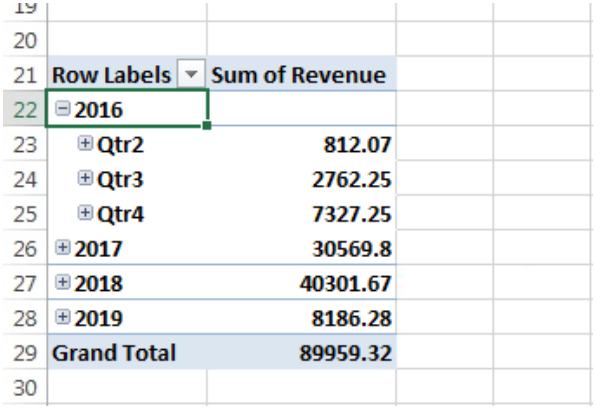
Create a Pivot table

Do Now

1. **Open the file `C:\CB08\04_Make a PivotTable.xls`**
2. **With your instructor, create a pivot table**



	Row Labels	Sum of Revenue
20		
21	Row Labels	Sum of Revenue
22	⊟2016	
23	⊞Qtr2	812.07
24	⊞Qtr3	2762.25
25	⊞Qtr4	7327.25
26	⊞2017	30569.8
27	⊞2018	40301.67
28	⊞2019	8186.28
29	Grand Total	89959.32
30		

3. **Create a Pivot table from an External data source**
   - Observe Connection Properties

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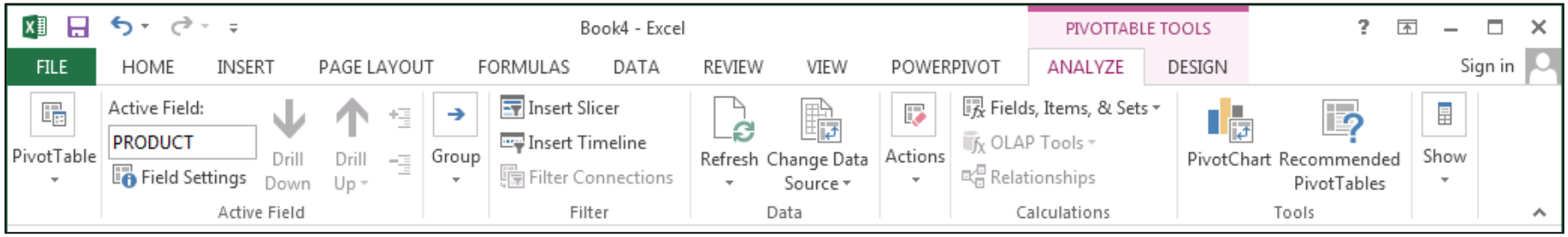
What Can I Do to My PivotTable?



- **PivotTable Tools—context-sensitive**
- **ANALYZE**
  - Helps to interpret the data:
    - PivotCharts
    - Create groups
    - Create calculations
    - Create filters
- **DESIGN**
  - Formats the PivotTable
  - Changes the layout

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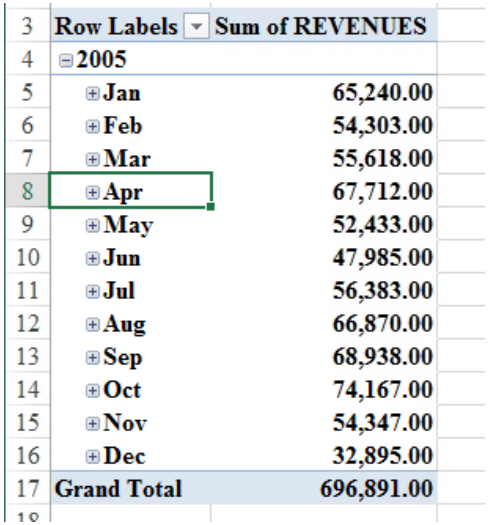
Grouping Your Data

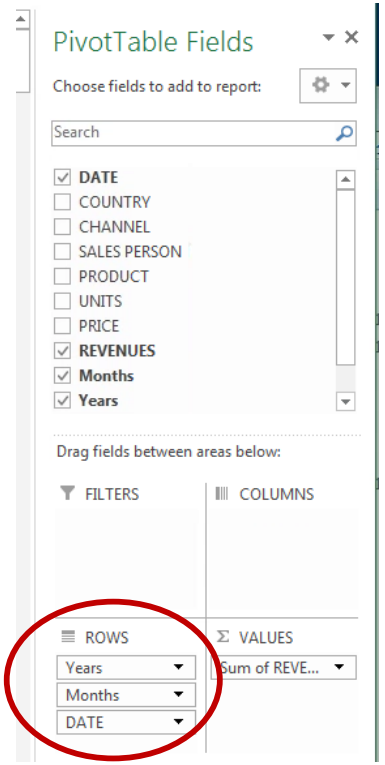
- **By Default, dates are grouped**
  - System creates a hierarchy
    - New fields are created from the Date field
  - + and – signs allow you to collapse or expand a group

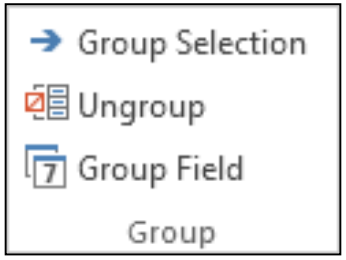
- **Change the grouping**
  - Pivot Table Tools | Analyze | Group

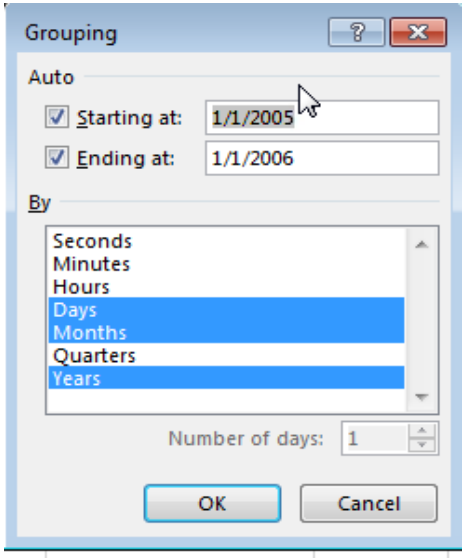
  OR
  - Right-click on Date field
    - Group



	Row Labels	Sum of REVENUES
3		
4	⊟2005	
5	⊞Jan	65,240.00
6	⊞Feb	54,303.00
7	⊞Mar	55,618.00
8	⊞Apr	67,712.00
9	⊞May	52,433.00
10	⊞Jun	47,985.00
11	⊞Jul	56,383.00
12	⊞Aug	66,870.00
13	⊞Sep	68,938.00
14	⊞Oct	74,167.00
15	⊞Nov	54,347.00
16	⊞Dec	32,895.00
17	Grand Total	696,891.00







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Grouping Your Data

	A	B	C	D	E	F	G	H	I
4	Sum of REVENUES	Column Labels							
5	Row Labels	1/1/2005	1/2/2005	1/4/2005	1/5/2005	1/6/2005	1/11/2005	1/16/2005	1/17/2005
6	Dan Clifford	2275		1625					
7	Jonathan Mark		2000				1600		
8	Karen Lee				2275			650	3237
9	Megan Strutt								
10	Wayne Sarten					1200			
11	Grand Total	2275	2000	1625	2275	1200	1600	650	3237

Before

	A	B	C	D	E	F	G	H	I	J	K	L	M
4	Sum of REVENUES	Column Labels											
5	Row Labels	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
6	Dan Clifford	5500	2702	9676	1800	6535	8091	5550	5474		2041	10240	1950
7	Jonathan Mark	4950		1300	2400		1950		4944	338	1352		900
8	Karen Lee	9112	3261	2450	6246	2769	12570	9835	13609	4850	12943	9478	1404
9	Megan Strutt	4000	2990		4642	2392		1794	2700	1600		975	
10	Wayne Sarten	1200	2250		2925	1950	6175	4645	2418		2925	400	598
11	Grand Total	24762	11203	13426	18013	13646	28786	21824	29145	6788	19261	21093	4852

After

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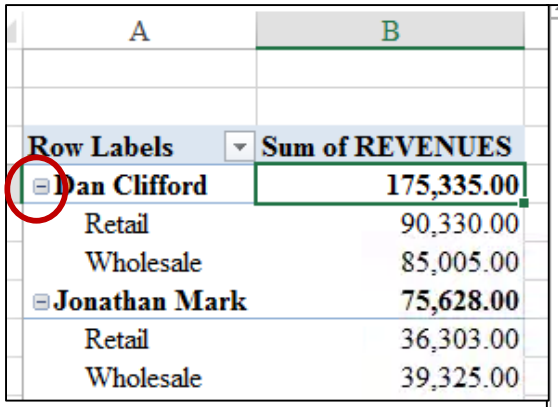
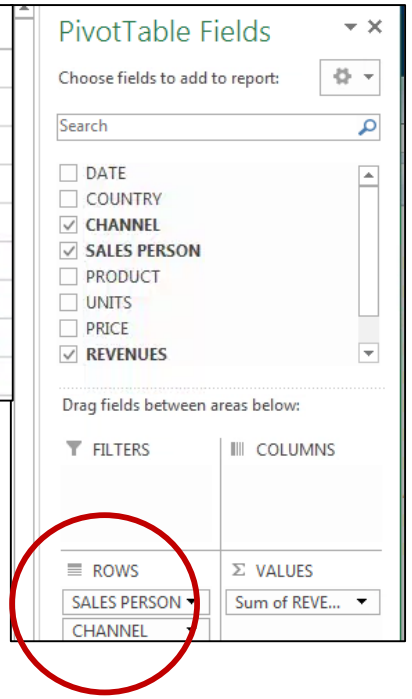
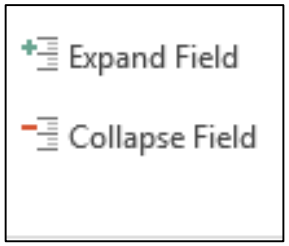
Groups: Hide and Show Detail

- **Create other groups by populating the Row area with more than one field**
- **Show or Hide detail**
  - Expand/Collapse a row or column heading
- **Expand or Collapse entire Field**
  - Click on Pivot Table Tools | Options | Active Field
  - Right Click to reveal the short cut menu Expand/Collapse to hide or show values
- **Show what makes up a value**
  - Double-click a data item to drill down
    - Displays details in a new sheet



A	B
Row Labels	Sum of REVENUES
Dan Clifford	175,335.00
Retail	90,330.00
Wholesale	85,005.00
Jonathan Mark	75,628.00
Retail	36,303.00
Wholesale	39,325.00





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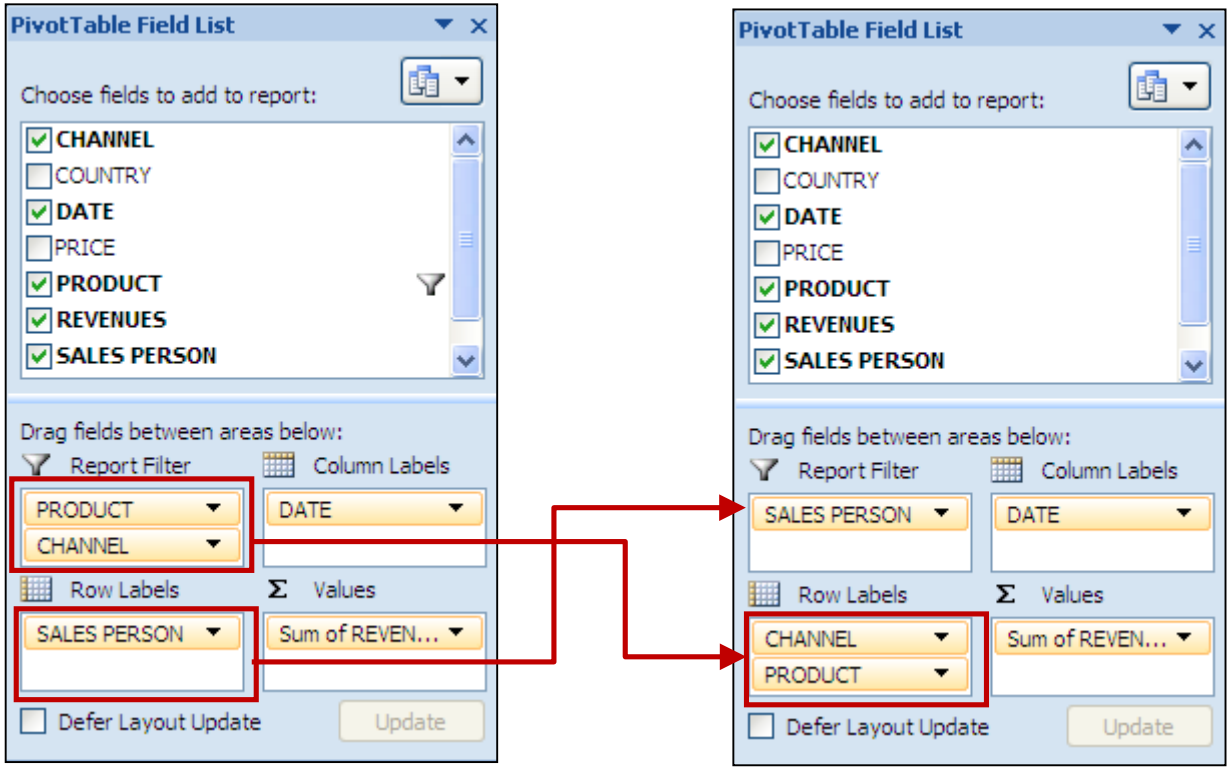
Pivoting

- **Change the perspective of the PivotTable**
  - Drag a field and drop it into a new field location in Field List areas
  - Example: I want to see the product breakdown for each channel



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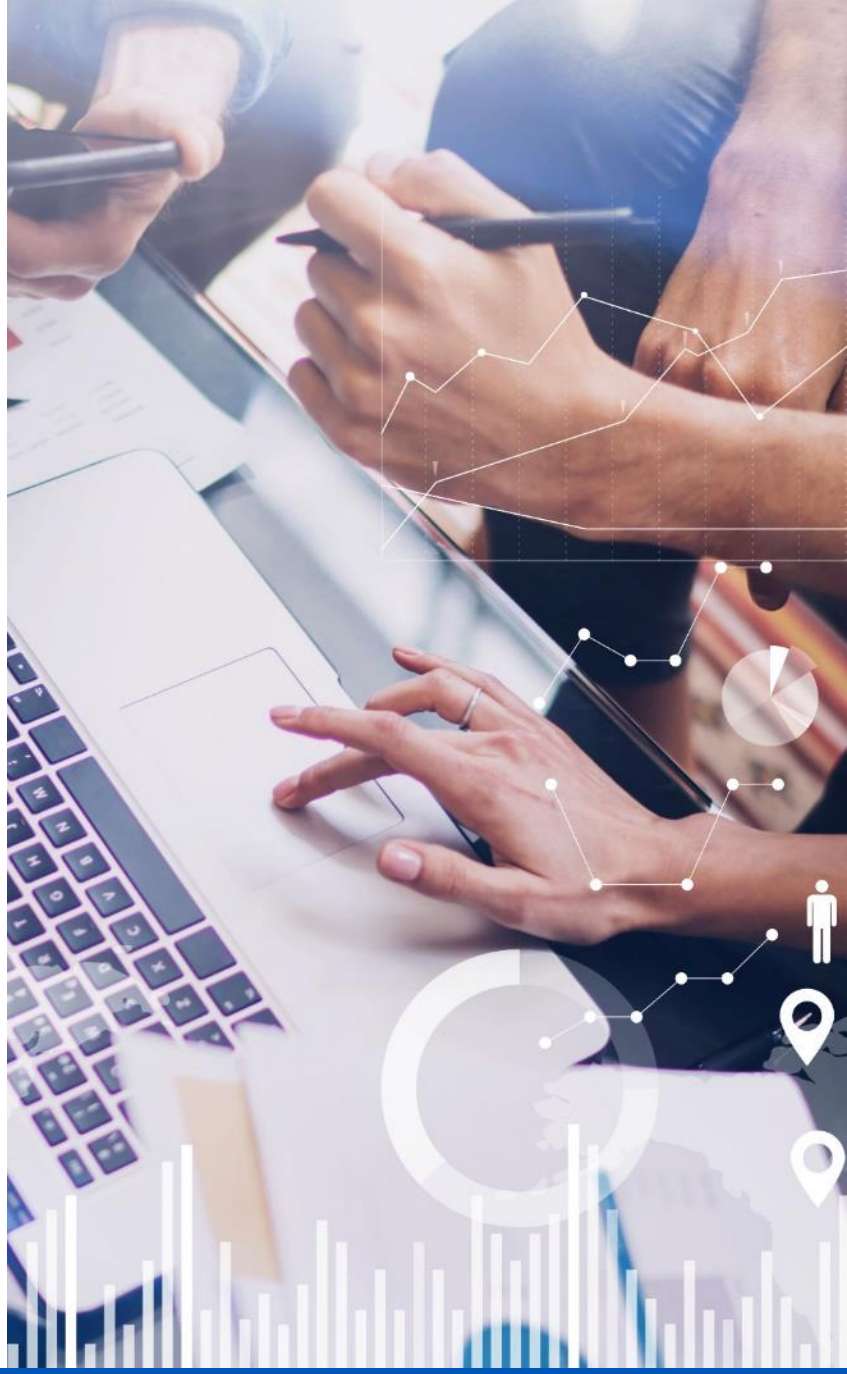
Contents

- Interrogating Excel Lists
- Creating PivotTables and PivotCharts

Hands-On Exercise 1.1

- Analyzing Data With PivotTables
- Hands-On Exercise 1.2



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Hands-On Exercise 1.1

Exercise Manual

- **In your Exercise Manual, please refer to Hands-On Exercise 1.1: Reporting Data in a PivotTable**

Main exercise	Your team has to produce a report for the board for the sales data in different countries. You will prepare the data in the form of a PivotTable.
Bonus	You will examine how to refresh a PivotTable and extract data from an Access database.

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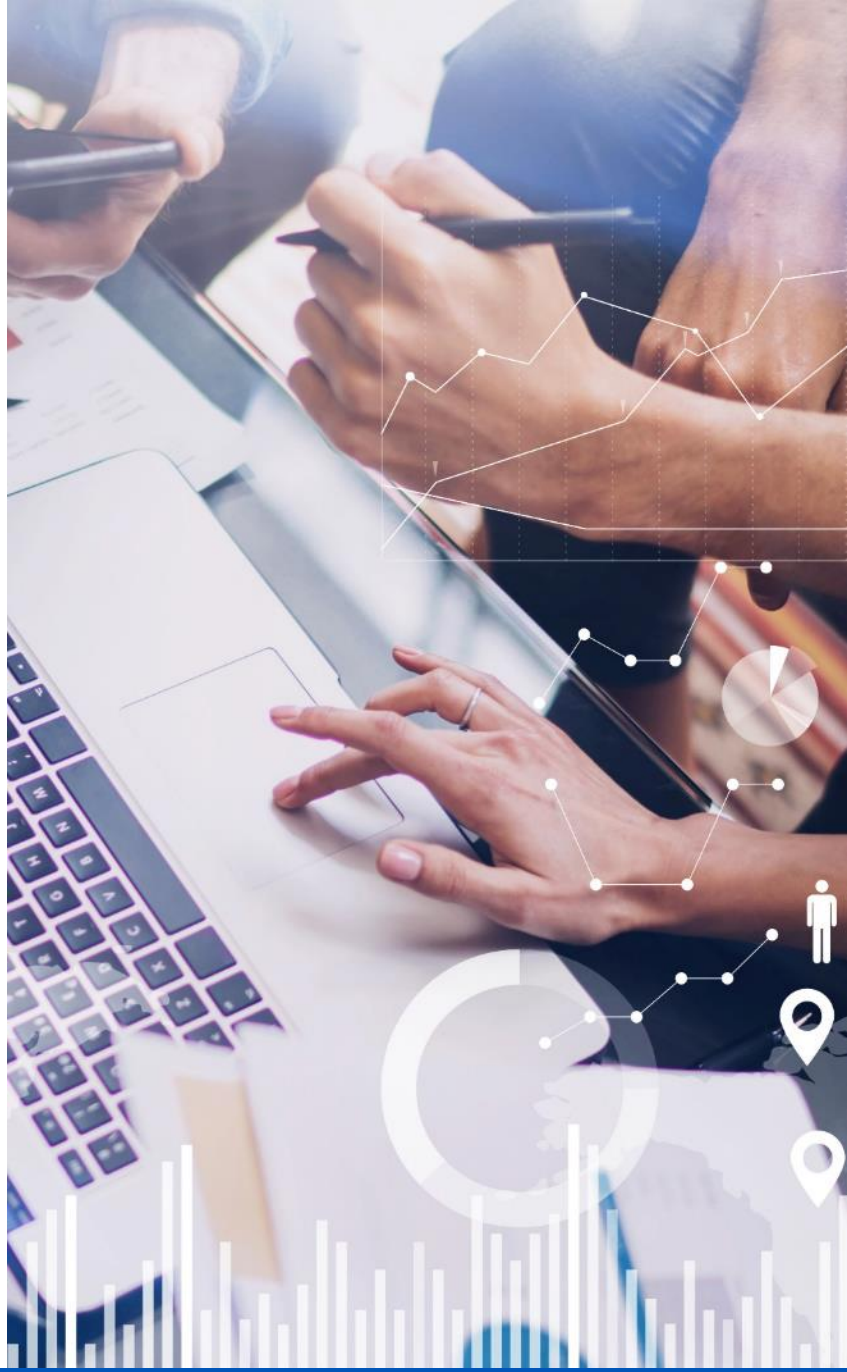
- Hands-On Exercise 1.2



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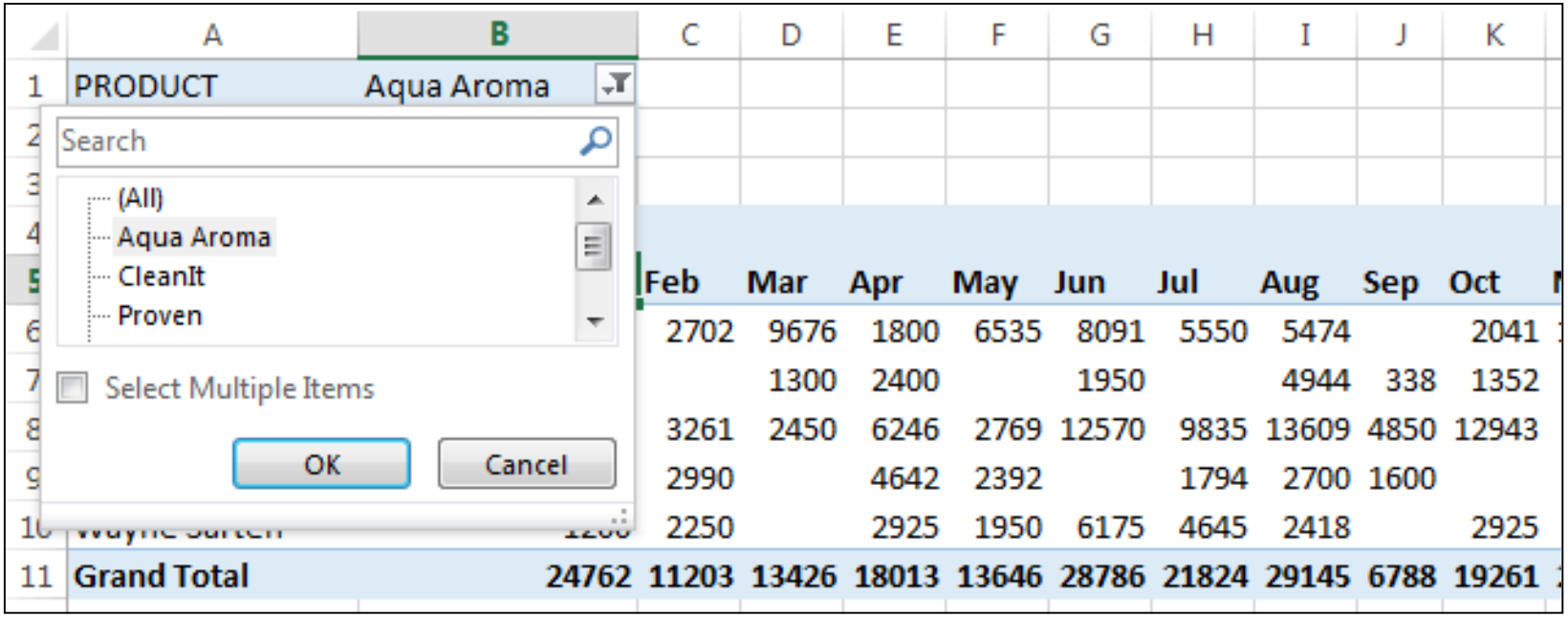
Filter by Filter

- **Use the Report Filter**
- **Filter by a single item**
  - Example: I want to see the revenue generated for Aqua Aroma
- **Filter by multiple items**
  - "Select Multiple Items" checkbox



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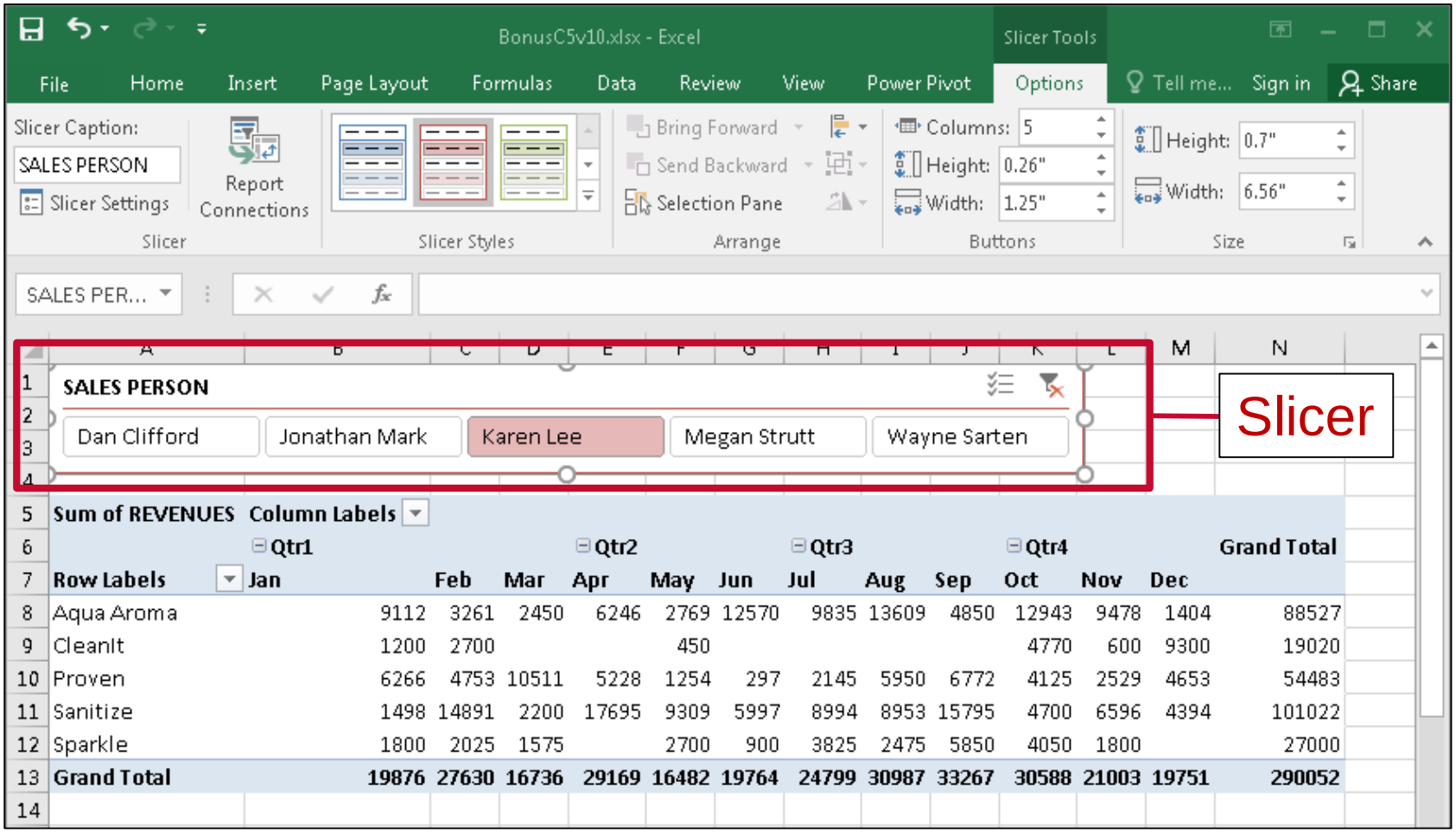
Filter by Slicer



Sum of REVENUES	Column Labels												
	Qtr1			Qtr2			Qtr3			Qtr4			Grand Total
Row Labels	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Aqua Aroma	9112	3261	2450	6246	2769	12570	9835	13609	4850	12943	9478	1404	88527
CleanIt	1200	2700			450					4770	600	9300	19020
Proven	6266	4753	10511	5228	1254	297	2145	5950	6772	4125	2529	4653	54483
Sanitize	1498	14891	2200	17695	9309	5997	8994	8953	15795	4700	6596	4394	101022
Sparkle	1800	2025	1575		2700	900	3825	2475	5850	4050	1800		27000
Grand Total	**19876**	**27630**	**16736**	**29169**	**16482**	**19764**	**24799**	**30987**	**33267**	**30588**	**21003**	**19751**	**290052**

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Filter by Slicer

- **Filter data visually by adding a slicer to a PivotTable**
  1. Make PivotTable active
     - Click in PivotTable
  2. Insert | Filters | Slicer
     - “Insert Slicers” dialog box appears
  3. Select the field to “slice” the data
     - Boxes/buttons appear for each item in the field
- **Use the buttons to filter the PivotTable**
- **Connect more than one PivotTable to the same slicer**

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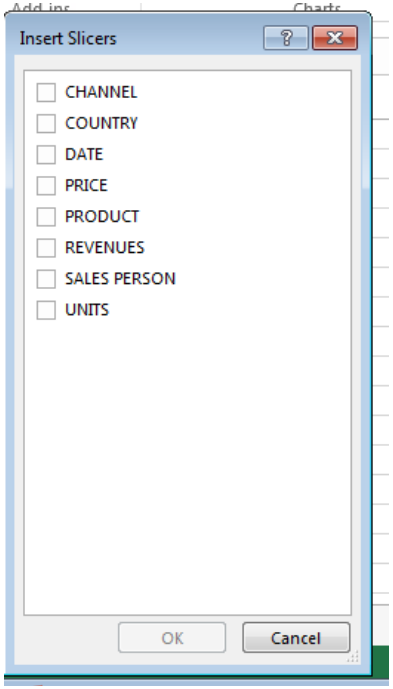
Create a Slicer

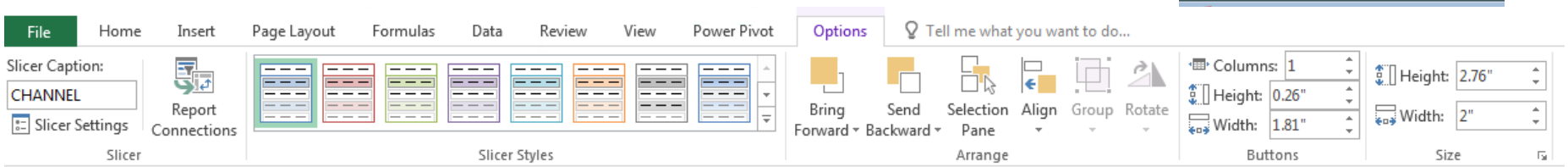
Do Now

1. **Open the file `C:\CB08\05_Pivot tables with Slicer.xlsx`**

2. **Verify that you are in the pivot table**
   - Add in a slicer
     - Click on Insert | Filters | Slicer
     - Click on the box next to Channel and Country
     - Click on OK



3. **Investigate the slicer tools**
   - Slicer Styles to change colors
   - Buttons group | Columns to change columns from 1 to many



4. **Leave the file open**

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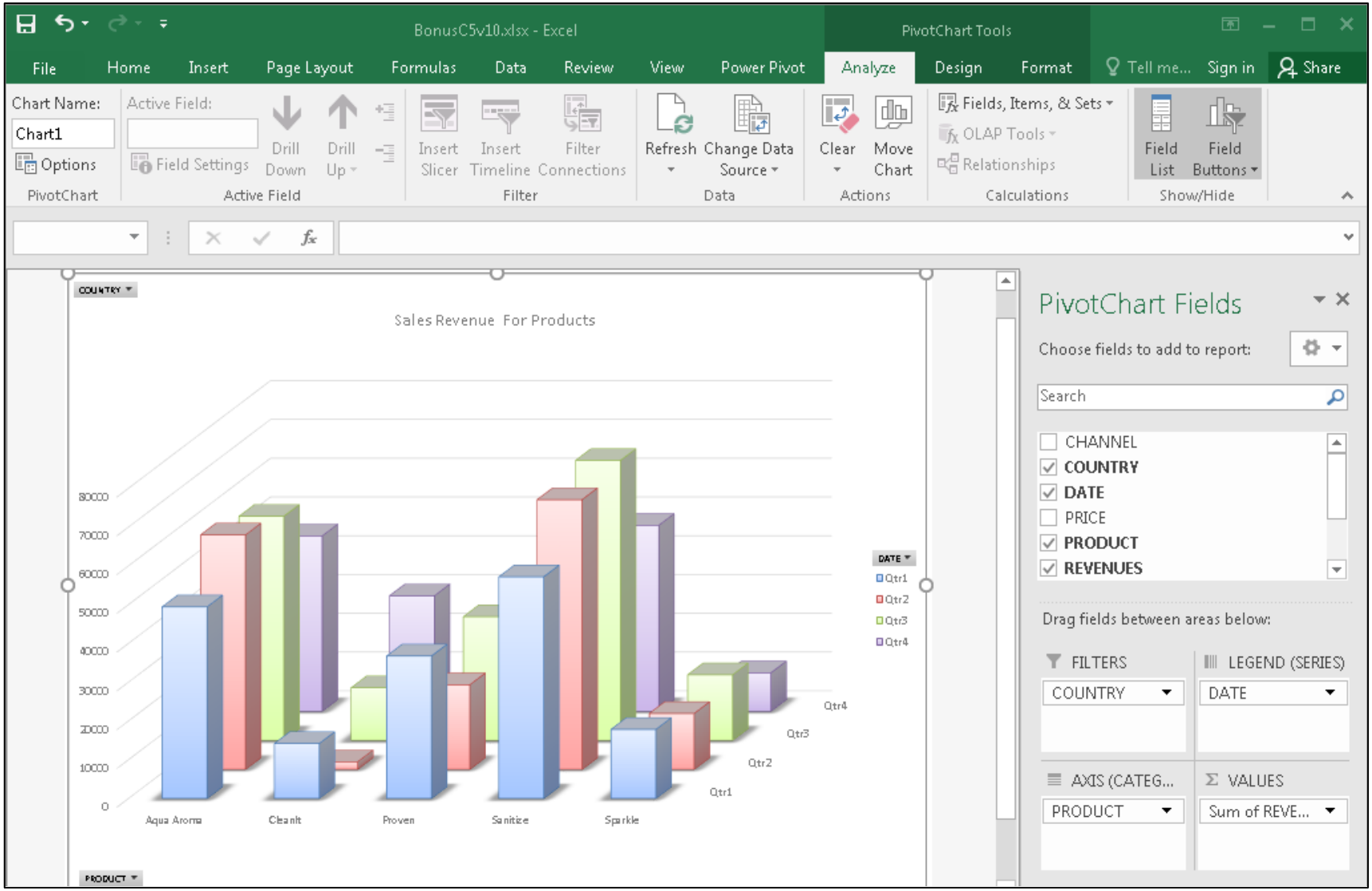
PivotCharts



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PivotCharts

- **Display the detail you want to chart on the PivotTable**
  - From the PivotTable Tools, select **Options | Tools | PivotChart**

- **Pivot fields like a PivotTable**
- **Configure using PivotChart Tools**
  - Analyze: specific PivotChart commands
  - Design, Layout, Format: generic chart commands

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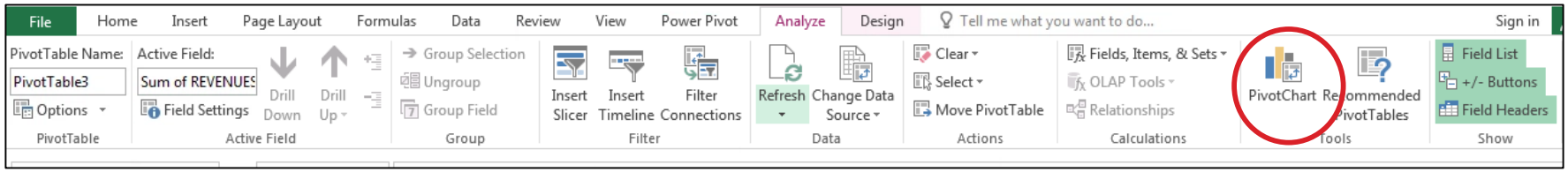
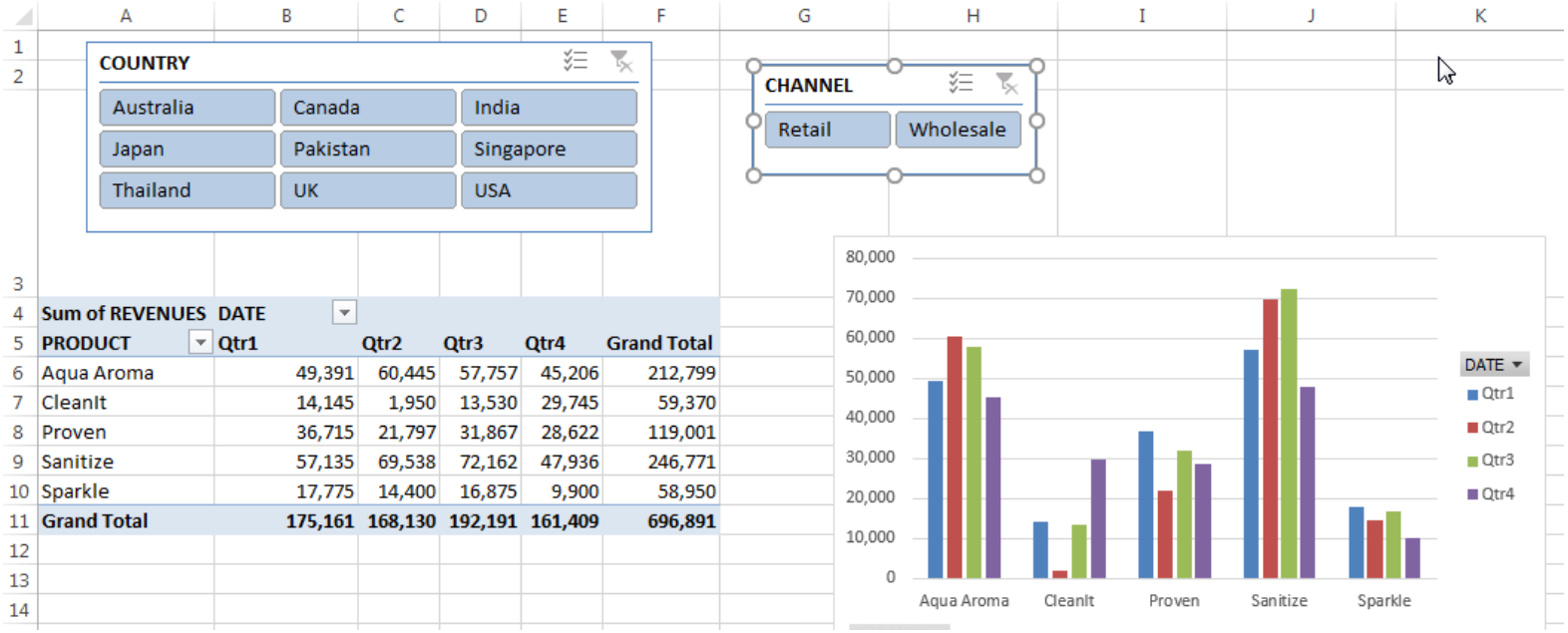
Create Pivot Chart

Do Now

1. Using the existing file, click inside the pivot table
2. Click on PivotTable tools | Analyze | Tools | PivotChart





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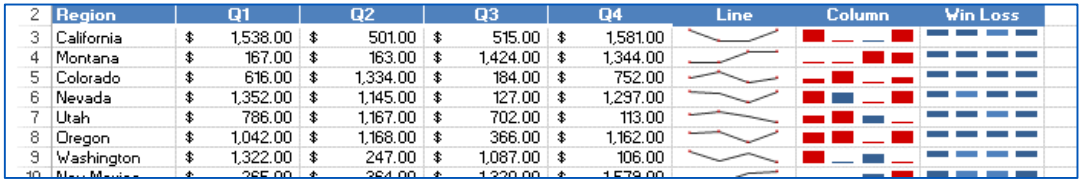
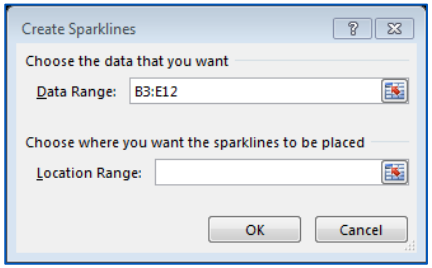
Visually Present Data With Sparklines

- **Sparklines are trend charts placed inside a range of cells**
  - Types: Line, Column, Win/Loss

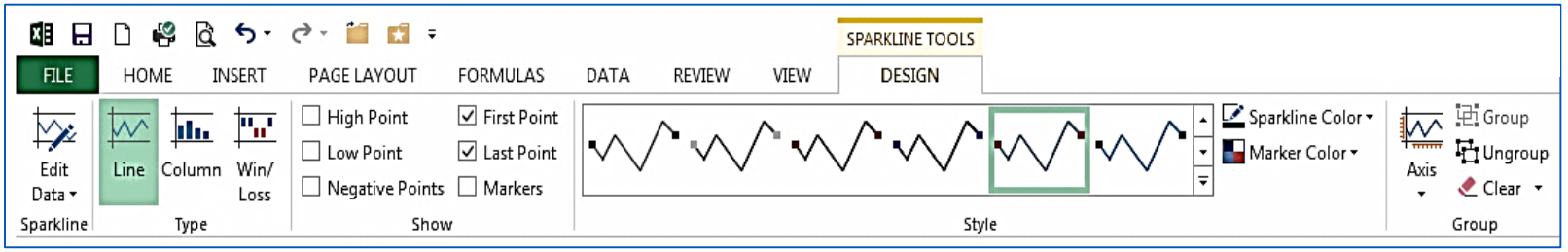


	Region	Q1	Q2	Q3	Q4	Line	Column	Win Loss
3	California	$ 1,538.00	$ 501.00	$ 515.00	$ 1,581.00			
4	Montana	$ 167.00	$ 163.00	$ 1,424.00	$ 1,344.00			
5	Colorado	$ 616.00	$ 1,334.00	$ 184.00	$ 752.00			
6	Nevada	$ 1,352.00	$ 1,145.00	$ 127.00	$ 1,297.00			
7	Utah	$ 786.00	$ 1,167.00	$ 702.00	$ 113.00			
8	Oregon	$ 1,042.00	$ 1,168.00	$ 366.00	$ 1,162.00			
9	Washington	$ 1,322.00	$ 247.00	$ 1,087.00	$ 106.00			

- **Create Sparklines:**
  - Select the numbers to be graphed
  - Click Insert | Sparklines | Line
  - Indicate the Location Range of the chart
  - Click OK



- **Sparkline tools allow you to change the design and format**



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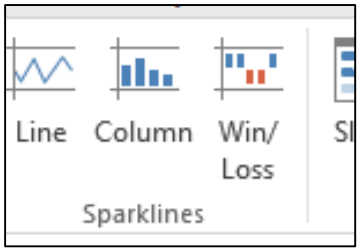
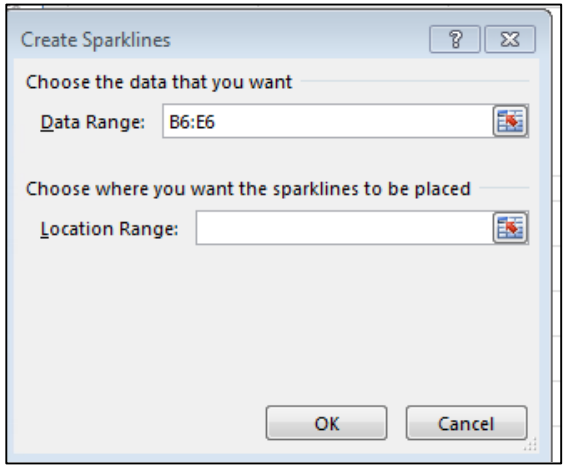
Enhance the Pivot Table With Sparklines

Do Now

1. **Using the same file as the previous exercise**
2. **Select cells B6:E6 to highlight Aqua Aroma Sales by Quarter**
3. **Click on Insert | Sparklines | Column**



4. **In the create Sparklines Dialog**
   - Verify the data range
   - Click into the Location Range Box
   - Point to cell on G6
   - Click on OK



Sum of REVENUES	DATE				
PRODUCT	Qtr1	Qtr2	Qtr3	Qtr4	Grand Total
Aqua Aroma	49,391	60,445	57,757	45,206	212,799
CleanIt	14,145	1,950	13,530	29,745	59,370
Proven	36,715	21,797	31,867	28,622	119,001
Sanitize	57,135	69,538	72,162	47,936	246,771

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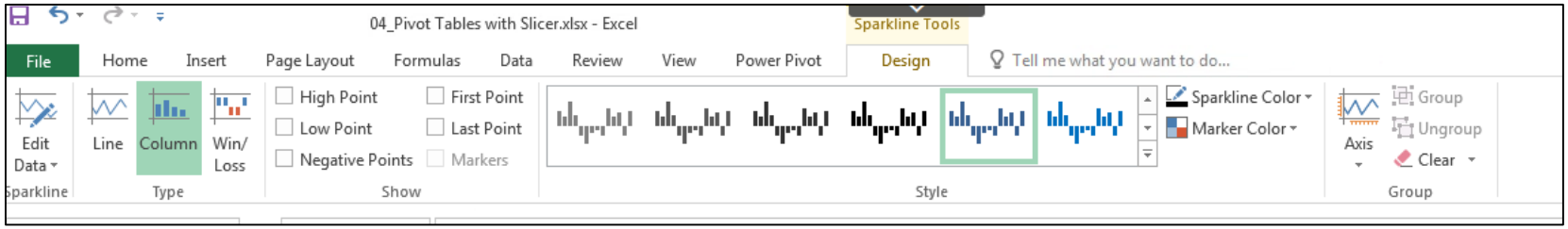
Enhance the Pivot Table With Sparklines (Continued)

Do Now

5. **Using Sparkline tools | Design | Show**
   - Click on box next to High Point and Low point
   - From the Style group investigate the various styles



6. **Drag the fill handle down to fill the sparklines**

Sum of REVENUES	DATE				
PRODUCT	Qtr1	Qtr2	Qtr3	Qtr4	Grand Total
Aqua Aroma	49,391	60,445	57,757	45,206	212,799
CleanIt	14,145	1,950	13,530	29,745	59,370
Proven	36,715	21,797	31,867	28,622	119,001
Sanitize	57,135	69,538	72,162	47,936	246,771
Sparkle	17,775	14,400	16,875	9,900	58,950
Grand Total	**175,161**	**168,130**	**192,191**	**161,409**	**696,891**

7. **Filter the data by country. Notice how the sparklines have changed**

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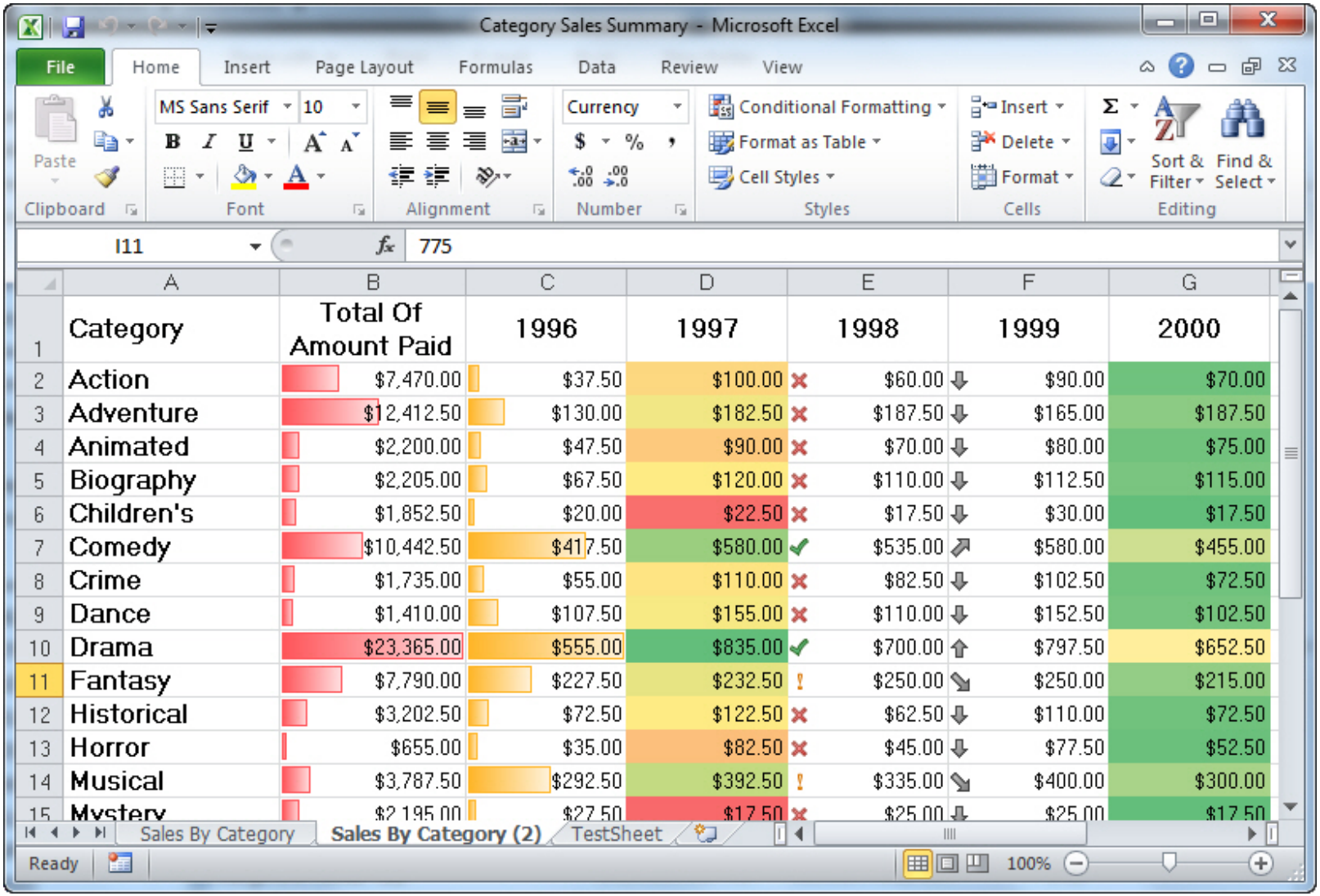
Conditionally Formatting Cells and Data



	A	B	C	D	E	F	G
1	Category	Total Of Amount Paid	1996	1997	1998	1999	2000
2	Action	$7,470.00	$37.50	$100.00	$60.00	$90.00	$70.00
3	Adventure	$12,412.50	$130.00	$182.50	$187.50	$165.00	$187.50
4	Animated	$2,200.00	$47.50	$90.00	$70.00	$80.00	$75.00
5	Biography	$2,205.00	$67.50	$120.00	$110.00	$112.50	$115.00
6	Children's	$1,852.50	$20.00	$22.50	$17.50	$30.00	$17.50
7	Comedy	$10,442.50	$417.50	$580.00	$535.00	$580.00	$455.00
8	Crime	$1,735.00	$55.00	$110.00	$82.50	$102.50	$72.50
9	Dance	$1,410.00	$107.50	$155.00	$110.00	$152.50	$102.50
10	Drama	$23,365.00	$555.00	$835.00	$700.00	$797.50	$652.50
11	Fantasy	$7,790.00	$227.50	$232.50	$250.00	$250.00	$215.00
12	Historical	$3,202.50	$72.50	$122.50	$62.50	$110.00	$72.50
13	Horror	$655.00	$35.00	$82.50	$45.00	$77.50	$52.50
14	Musical	$3,787.50	$292.50	$392.50	$335.00	$400.00	$300.00
15	Mystery	$2,195.00	$27.50	$17.50	$25.00	$25.00	$17.50

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Conditionally Formatting Cells and Data

- **Conditional formatting formats data based on cell value**
- **Benefits**
  - Helps highlight important data
  - Visually identify trends in data
  - Find data breakpoints
    - Who has sold *X* amount
    - Who is getting paid more than they generate in revenue
    - Highest-performing or lowest-performing students
  - Conditional formatting overrides manual formatting
- **The steps**
  - Select cell or range
  - Select **Home | Styles | Conditional Formatting**
  - Select format type

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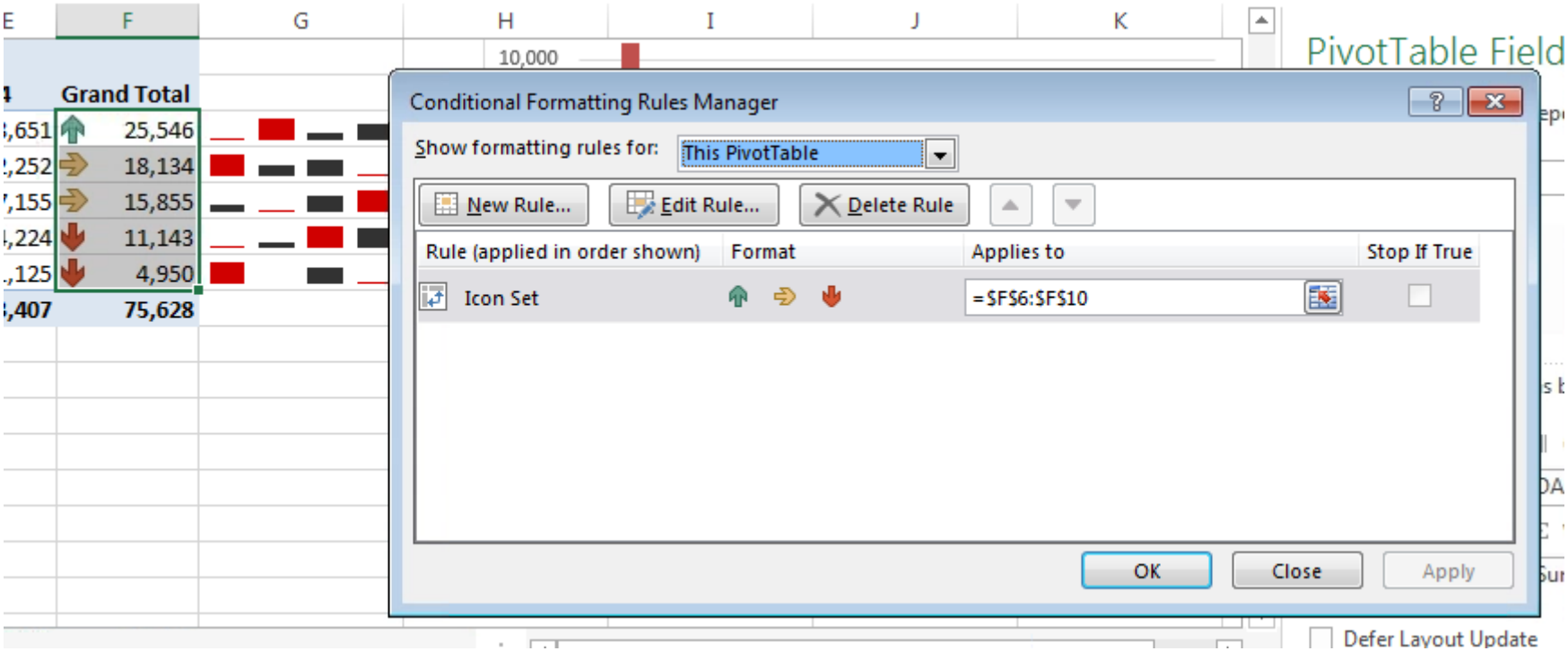
Managing Conditional Formatting

- **Manage conditional formatting by selecting Home | Styles | Conditional Formatting | Manage Rules**



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Enhance the Pivot Table With Conditional Formatting

Do Now

1. Using the same file as the previous exercise
2. Select cells F6:F10 to highlight the Grand Total
3. Right-click the mouse, select Sort | Largest to Smallest
4. Click on Home | Conditional Formatting | Icon Sets | 3 arrows

Sum of REVENUES	DATE				
PRODUCT	Qtr1	Qtr2	Qtr3	Qtr4	Grand Total
Sanitize	1,903	10,492	4,500	8,651	25,546
Aqua Aroma	6,250	4,350	5,282	2,252	18,134
CleanIt	2,685	450	5,565	7,155	15,855
Proven	779	1,650	4,490	4,224	11,143
Sparkle	2,025		1,800	1,125	4,950

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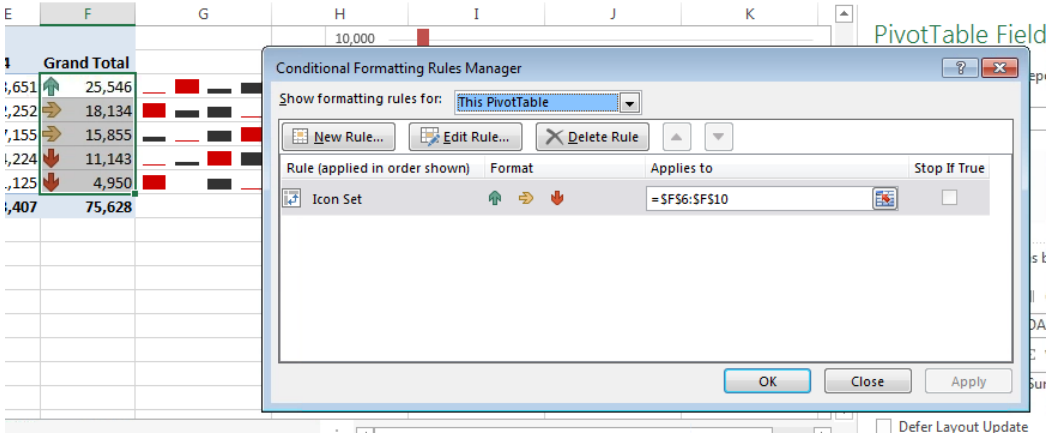
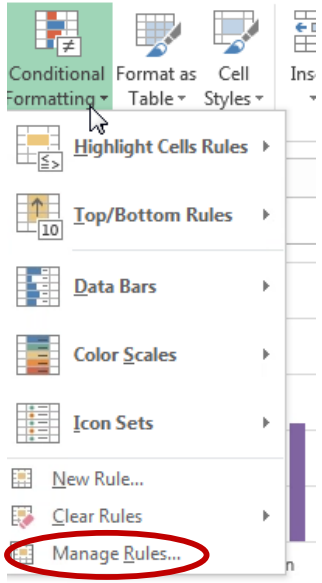
Enhance the Pivot Table With Conditional Formatting

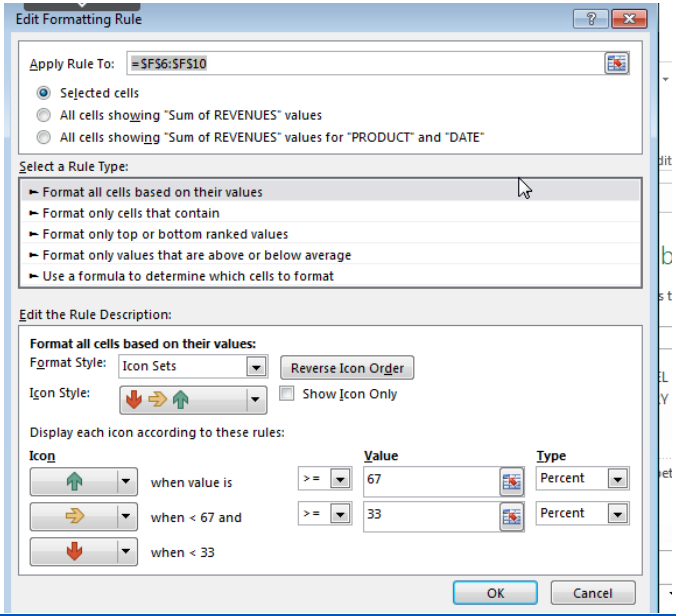
Do Now

5. **Investigate the cell rules, click on Home | Conditional Formatting drop down | Manage Rules**





6. **Click on Edit Rule**
   - Observe Rule description



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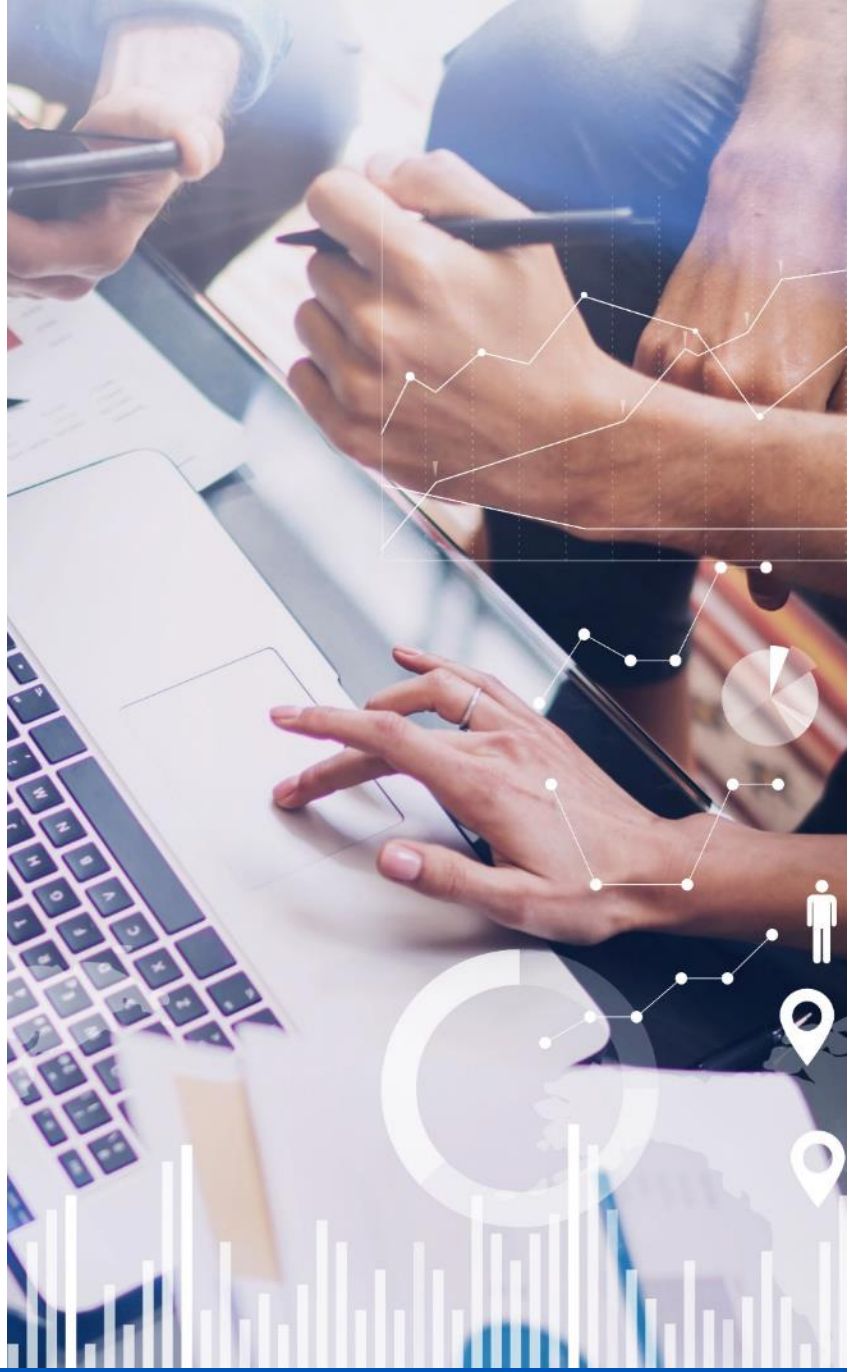
- Interrogating Excel Lists
- Creating PivotTables and PivotCharts
- Hands-On Exercise 1.1
- Analyzing Data With PivotTables

Hands-On Exercise 1.2



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Hands-On Exercise 1.2

Exercise Manual

- **In your Exercise Manual, please refer to Hands-On Exercise 1.2: Analyzing Data With PivotTables**

Main exercise	The board has lots of questions to ask you regarding the sales data for the different countries. You need to provide some quick answers.
Bonus	You will add custom formulas and create a PivotChart from the PivotTable.

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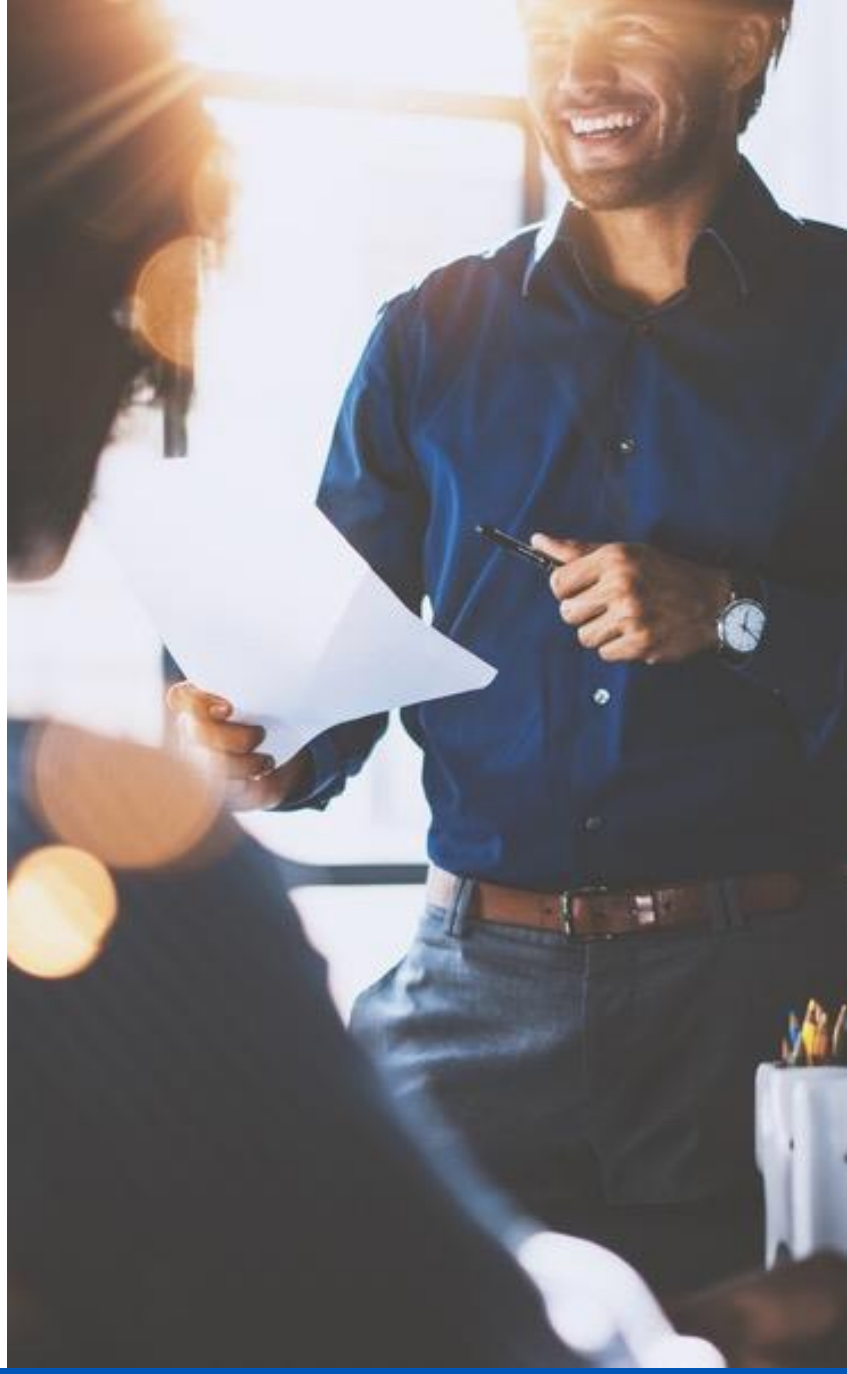
Objectives

- Analyze and subtotal data contained in an Excel dataset with filtering and subtotaling
- Summarize business data with PivotTables
- Manipulate a PivotTable to examine data



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