



Excel

Pivot tables and charts

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Pivot table

- A pivot table is an interactive table that automatically crosses the information of several fields of a data table and presents summaries or maths/statistical operations.
- Its structure can easily be changed through the insertions, rotation or reconfiguration of the fields used in its rows or columns, allowing the observation of different results and information
- Note: if the data of the original table are changed, you need to update the pivot table

	A	B	C	D	E	F
1	Month	Products	Store	Region	Qtt	Sales
2	January	Accessories	Porto	North	70	1 707,00 €
3	January	Stationary	Lisboa	South	94	1 292,00 €
4	January	Gifts	Lisboa	South	79	781,00 €
5	January	Tobacco	Lisboa	South	95	1 368,00 €
6	February	Accessories	Aveiro	Centre	116	1 587,00 €
7	February	Stationary	Braga	North	88	787,00 €
8	February	Stationary	Porto	North	52	1 903,00 €
9	February	Tobacco	Setubal	South	117	2 205,00 €
10	February	Gifts	Porto	North	69	755,00 €
11	March	Gifts	Setubal	South	111	875,00 €
12	March	Tobacco	Porto	North	89	2 316,00 €
13	March	Stationary	Braga	North	50	2 285,00 €
14	March	Gifts	Braga	North	113	1 691,00 €
15	April	Tobacco	Aveiro	Centre	118	948,00 €
16	April	Tobacco	Braga	North	81	1 624,00 €
17	April	Tobacco	Lisboa	South	86	2 280,00 €
18	April	Accessories	Coimbra	Centre	82	1 084,00 €
19	May	Accessories	Setubal	South	68	956,00 €
20	May	Stationary	Lisboa	South	80	1 916,00 €
21	May	Gifts	Aveiro	Centre	89	2 266,00 €
22	May	Gifts	Coimbra	Centre	99	2 082,00 €
23	June	Accessories	Coimbra	Centre	51	1 064,00 €
24	June	Accessories	Lisboa	South	54	1 373,00 €
25	June	Gifts	Aveiro	Centre	116	850,00 €
26	June	Gifts	Braga	North	108	1 629,00 €

Crossing store and product data presenting a summary total (sum) of sales, allowing filter by region

	A	B	C	D	E	F
1	Region	(All)				
2						
3	Sum of Sales	Column Labels				
4	Row Labels	Accessories	Gifts	Stationary	Tobacco	Grand Total
5	Aveiro	1587	3116		948	5651
6	Braga		3320	3072	1624	8016
7	Coimbra	2148	2082			4230
8	Lisboa	1373	781	3208	3648	9010
9	Porto	1707	755	1903	2316	6681
10	Setubal	956	875		2205	4036
11	Grand Total	7771	10929	8183	10741	37624
12						
13						
14						
15						
16						
17						
18						
19						
20						
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22						
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26						
27						
28						
29						

PivotTable Fields

Choose fields to add to report:

Search

☐ Month
☒ **Products**
☒ **Store**
☒ **Region**
☐ Qtt
☒ **Sales**

More Tables...

Drag fields between areas below:

Filters
Region

Columns
Products

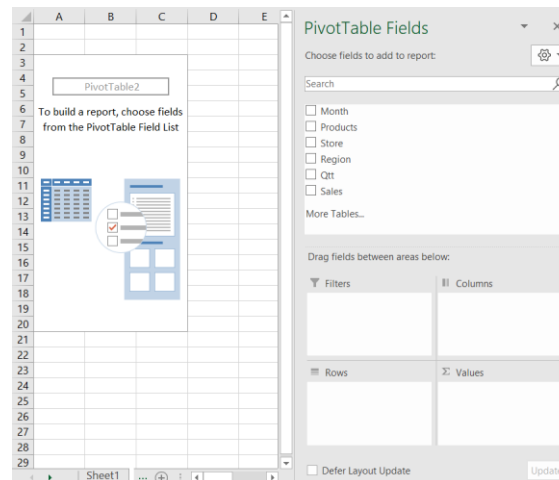
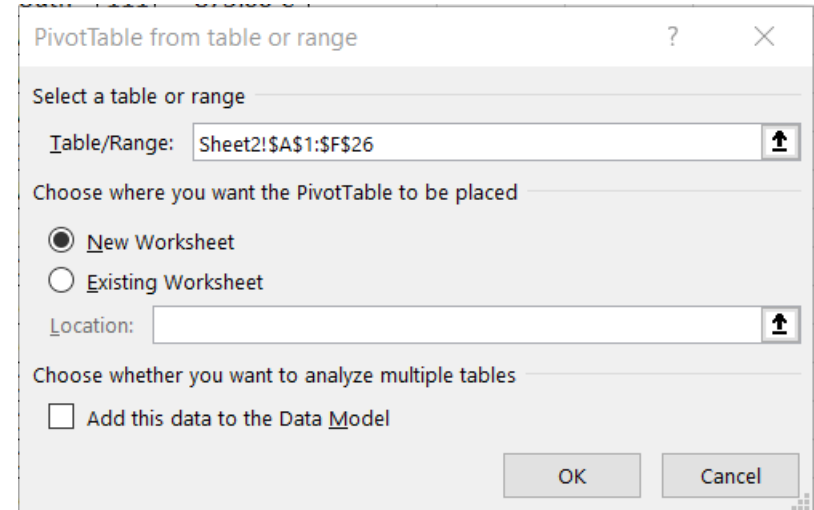
Rows
Store

Σ Values
Sum of Sales

☐ Defer Layout Update Update

How to

1. Select original table
2. Tab "Insert" > Group "Tables" > Command "Pivot Table"
3. Fill the dialog "PivotTable from Table or Range", considering:
 - Choose data
 - Table/Range: original table
 - Choose where you want PivotTable to be placed:
 - New Worksheet
 - Existing Worksheet
4. Configure the PivotTable by selecting in the dialog "PivotTable Fields", dragging from "Choose fields to add to report" to the areas below



Pivot table areas

Filters: allow identifying a field of the original table that can be used to filter the pivot table. Useful when there is a relation between at least two columns in the original table (e.g: store, region)

Rows: identify the fields on the original table that contain the values to be presented on the pivot table's rows. When several are chosen, the first is displayed only once and the remain are repeated

Columns: identify the fields in the original table that contain the values to be presented on the pivot table's columns. When several are chosen, the first is displayed only once and the remain are repeated

Values: identify the fields of the original table that contain the values to be summarised through a certain mathematical/statistical operation. The summaries are obtained according to the crossing of the data of the rows and columns



Configuring pivot tables

- Change the fields of the pivot table areas:
 - Insert a field: drag it from the list above
 - Remove a field: unselect the field on the list above
 - Change a field's position: drag it to the desired box
- Applying filters
 - Add: click on the selection field of the desired label. Select:
 - Label filters: applied directly to the values of the label's items. Several criteria can be applied
 - Value filters: applied over the values of the values area according to the selected label. Several criteria can be applied
 - List of values: select from the list
 - Remove: select the label's selection field. On the list select "Clear filter from (nameofthefield)"
- Changing the summary functions in the Values area:
 - Click on the field to change
 - Choose "Value Field Settings..."
 - Choose the function

Configuring pivot tables

- Creating calculated **fields and items**: field that results from the application of an expression/formula that uses at least one of the original table's fields
 - Select any cell of the pivot table
 - (Contextual) tab "PivotTable Analyse" > Group "Calculations" > Command "Fields, Items & Sets" > Calculated Field / Calculated Item
 - Define the name
 - Define the formula
 - Click Add
 - Click OK

Insert Calculated Field

Name: Field1 Add

Formula: = 0 Delete

Fields:

- Month
- Products
- Store
- Region
- Qty
- Sales

Insert Field

OK Close

Insert Calculated Item in "Products"

Name: Formula1 Add

Formula: = 0 Delete

Fields:

- Month
- Products
- Store
- Region
- Qty
- Sales

Items:

- Accessories
- Gifts
- Stationary
- Tobacco

Insert Field Insert Item

OK Close

Configuring pivot tables

- Grouping items: allow combining a set of related items in a group.
 - Manual grouping:
 - Select the cells with the item labels to group
 - (Contextual) tab “PivotTable Analyse” > Group “Group” > “Group selection”
 - Automatic grouping (numerical fields / date / time)
 - Select one of the label’s items
 - (Contextual) tab “PivotTable Analyse” > Group “Group” > “Group field”
- Totals and subtotals
 - Grand totals
 - Select a cell on the pivot table
 - (Contextual) tab “Design” > Group “Layout” > Command “Grand Totals” > choose
 - Subtotals
 - Select a cell on the pivot table
 - (Contextual) tab “Design” > Group “Layout” > Command “Subtotals” > choose

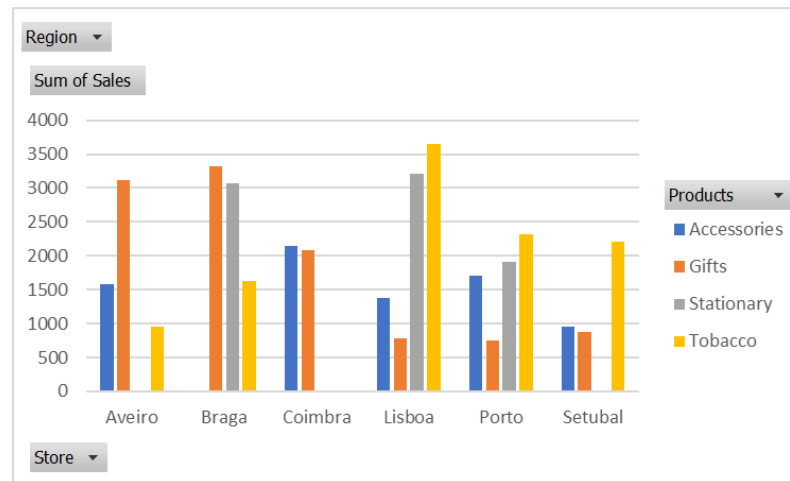
Pivot charts

From a data table

- Select the original data table
- Tab “Insert” > Group “Charts” > Command “PivotChart” > “PivotChart”
- Configure as a pivot table

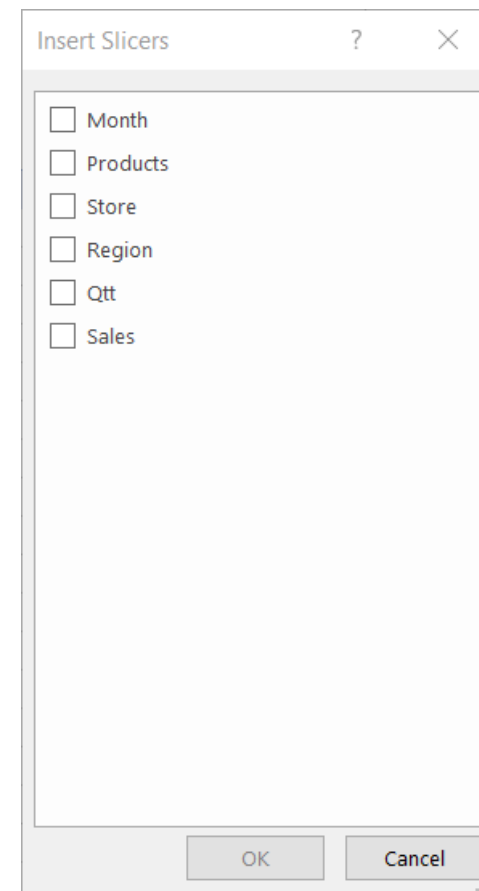
• From a pivot table:

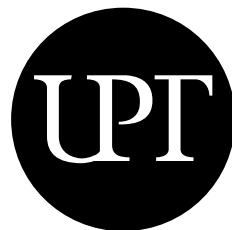
- Select a cell on the pivot table
- (Contextual) tab “PivotTable Analyse” > Group “Tools” > Command “PivotChart”



Slicers

- Create
 - Select a cell on the pivot table
 - (Contextual) tab “PivotTable Analyse” > Group “Filter” > Command “Insert Slicer”
 - Select the elements to insert the slicers
 - Ok
- Share
 - Select the slicer to be shared
 - (Contextual) tab “Slicer” > Group “Slicer” > Command “Report Connections”
 - Choose the table to share the slicer with





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