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# UNLOCKING THE POWER OF PIVOT TABLES IN EXCEL

## TRANSFORM YOUR DATA ANALYSIS!



FUTURE\_VISION\_COMPUTERS\_PIVOT\_TABLES - Excel (Product Activation Failed)

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do

Cut Copy Format Painter Clipboard

Font Alignment Number Styles Cells Editing

Calibri 11 A A Wrap Text General Conditional Formatting as Table Normal Bad Good Neutral Calculation Check Cell Explanatory... Input AutoSum Fill Sort & Filter Select Add-ins

X34

A B C D E F G H I J K L M N O P Q R S T U V W X

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TM

CALL CENTER DATASET

Resolved	Y	Z				
Count of Satisfaction rating	Column Labels					
Row Labels	Air Conditioner	Fridge	Television	Toaster	Washing Machine	Grand Total
Becky	31	23	35	33	32	154
Dan	36	26	46	42	27	177
Diane	28	31	43	35	31	168
Greg	28	27	35	32	33	155
Jim	35	38	33	31	36	173
Joe	35	33	35	38	28	169
Martha	27	29	30	30	36	152
Stewart	32	35	30	33	33	163
<b>Grand Total</b>	<b>252</b>	<b>242</b>	<b>287</b>	<b>274</b>	<b>256</b>	<b>1311</b>

Sheet1 Data

# WHAT IS A PIVOT TABLE?

A PIVOT TABLE IS A POWERFUL TOOL IN EXCEL THAT ALLOWS YOU TO SUMMARIZE, ANALYZE, AND PRESENT LARGE DATASETS IN A CLEAR AND ORGANIZED WAY.



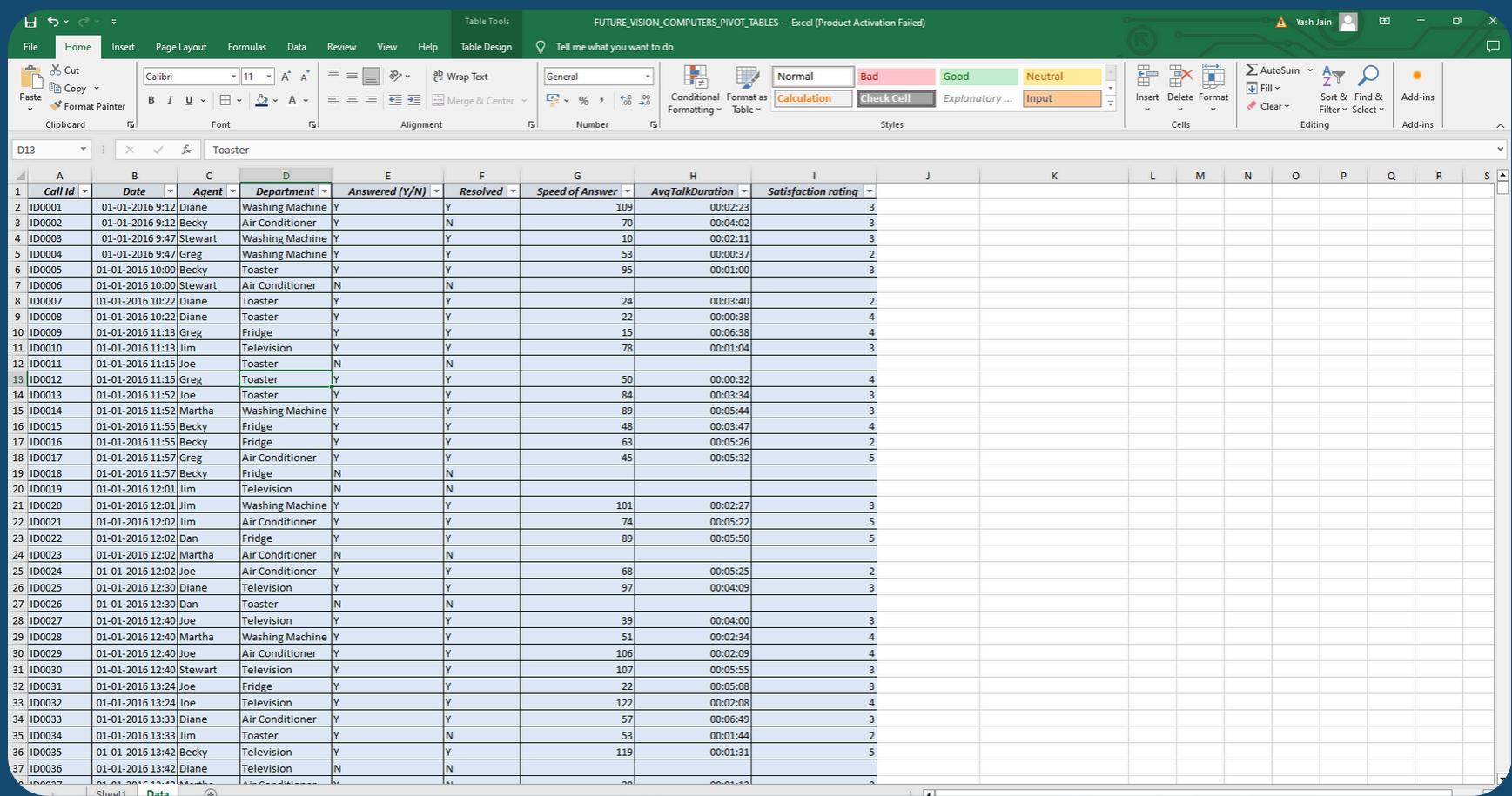


## WHY USE PIVOT TABLES?

- QUICKLY SUMMARIZE LARGE DATASETS
- EASILY MANIPULATE DATA VIEWS
- GENERATE INSIGHTFUL REPORTS AND CHARTS!

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The screenshot shows a Microsoft Excel spreadsheet titled "FUTURE\_VISION\_COMPUTERS\_PIVOT\_TABLES - Excel (Product Activation Failed)". The data is organized in a table with the following columns:

	Call Id	Date	Agent	Department	Answered (Y/N)	Resolved	Speed of Answer	AvgTalkDuration	Satisfaction rating	J	K	L	M	N	O	P	Q	R	S
1	ID0001	01-01-2016 9:12	Diane	Washing Machine	Y	Y	109	00:02:23	3										
2	ID0002	01-01-2016 9:12	Becky	Air Conditioner	Y	N	70	00:04:02	3										
3	ID0003	01-01-2016 9:47	Stewart	Washing Machine	Y	Y	10	00:02:11	3										
4	ID0004	01-01-2016 9:47	Greg	Washing Machine	Y	Y	53	00:00:37	2										
5	ID0005	01-01-2016 10:00	Becky	Toaster	Y	Y	95	00:01:00	3										
6	ID0006	01-01-2016 10:00	Stewart	Air Conditioner	N	N													
7	ID0007	01-01-2016 10:22	Diane	Toaster	Y	Y	24	00:03:40	2										
8	ID0008	01-01-2016 10:22	Diane	Toaster	Y	Y	22	00:00:38	4										
9	ID0009	01-01-2016 11:13	Greg	Fridge	Y	Y	15	00:06:38	4										
10	ID0010	01-01-2016 11:13	Jim	Television	Y	Y	78	00:01:04	3										
11	ID0011	01-01-2016 11:15	Joe	Toaster	N	N													
12	ID0012	01-01-2016 11:15	Greg	Toaster	Y	Y	50	00:00:32	4										
13	ID0013	01-01-2016 11:52	Joe	Toaster	Y	Y	84	00:03:34	3										
14	ID0014	01-01-2016 11:52	Martha	Washing Machine	Y	Y	89	00:05:44	3										
15	ID0015	01-01-2016 11:55	Becky	Fridge	Y	Y	48	00:03:47	4										
16	ID0016	01-01-2016 11:55	Becky	Fridge	Y	Y	63	00:05:26	2										
17	ID0017	01-01-2016 11:57	Greg	Air Conditioner	Y	Y	45	00:05:32	5										
18	ID0018	01-01-2016 11:57	Becky	Fridge	N	N													
19	ID0019	01-01-2016 12:01	Jim	Television	N	N													
20	ID0020	01-01-2016 12:01	Jim	Washing Machine	Y	Y	101	00:02:27	3										
21	ID0021	01-01-2016 12:02	Jim	Air Conditioner	Y	Y	74	00:05:22	5										
22	ID0022	01-01-2016 12:02	Dan	Fridge	Y	Y	89	00:05:50	5										
23	ID0023	01-01-2016 12:02	Martha	Air Conditioner	N	N													
24	ID0024	01-01-2016 12:02	Joe	Air Conditioner	Y	Y	68	00:05:25	2										
25	ID0025	01-01-2016 12:30	Diane	Television	Y	Y	97	00:04:09	3										
26	ID0026	01-01-2016 12:30	Dan	Toaster	N	N													
27	ID0027	01-01-2016 12:40	Joe	Television	Y	Y	39	00:04:00	3										
28	ID0028	01-01-2016 12:40	Martha	Washing Machine	Y	Y	51	00:02:34	4										
29	ID0029	01-01-2016 12:40	Joe	Air Conditioner	Y	Y	106	00:02:09	4										
30	ID0030	01-01-2016 12:40	Stewart	Television	Y	Y	107	00:05:55	3										
31	ID0031	01-01-2016 13:24	Joe	Fridge	Y	Y	22	00:05:08	3										
32	ID0032	01-01-2016 13:24	Joe	Television	Y	Y	122	00:02:08	4										
33	ID0033	01-01-2016 13:33	Diane	Air Conditioner	Y	Y	57	00:06:49	3										
34	ID0034	01-01-2016 13:33	Jim	Toaster	Y	N	53	00:01:44	2										
35	ID0035	01-01-2016 13:42	Becky	Television	Y	Y	119	00:01:31	5										
36	ID0036	01-01-2016 13:42	Diane	Television	N	N													
37	ID0037	01-01-2016 13:42	Air Conditioner	Y	Y	20	00:01:10	2											

# PREPARE YOUR DATA

**STEP 1: TO PREPARE YOUR DATA, ENSURE YOUR DATA IS IN A TABULAR FORMAT WITH HEADERS. CLEAN AND ORGANIZED DATA IS CRUCIAL FOR EFFECTIVE PIVOT TABLE CREATION!**



Cell Id	Date	Agent	Department	Answered (Y/N)	Resolved	Speed of Answer	AvgTalkDuration	Satisfaction rating
2	01-01-2016 9:12	Diane	Washing Machine	Y	Y	109	00:02:23	3
3	01-01-2016 9:12	Becky	Air Conditioner	Y	N	70	00:04:02	3
4	01-01-2016 9:47	Stewart	Washing Machine	Y	Y	10	00:02:11	3
5	01-01-2016 9:47	Greg	Washing Machine	Y	Y	53	00:00:37	2
6	01-01-2016 10:00	Becky	Toaster	Y	Y	45	00:01:00	3
7	01-01-2016 10:00	Stewart	Air Conditioner	N	N			2
8	01-01-2016 10:22	Diane	Toaster	Y	Y			4
9	01-01-2016 10:22	Diane	Toaster	Y	Y			3
10	01-01-2016 11:13	Greg	Fridge	Y	Y			4
11	01-01-2016 11:13	Jim	Television	Y	Y			3
12	01-01-2016 11:15	Joe	Toaster	N	N			4
13	01-01-2016 11:15	Greg	Toaster	Y	Y			3
14	01-01-2016 11:52	Joe	Toaster	Y	Y			3
15	01-01-2016 11:52	Martha	Washing Machine	Y	Y			3
16	01-01-2016 11:55	Becky	Fridge	Y	Y			4
17	01-01-2016 11:55	Becky	Fridge	Y	Y			2
18	01-01-2016 11:57	Greg	Air Conditioner	Y	Y			5
19	01-01-2016 11:57	Becky	Fridge	N	N			3
20	01-01-2016 12:01	Jim	Television	N	N			4
21	01-01-2016 12:01	Jim	Washing Machine	Y	Y	101	00:02:27	3
22	01-01-2016 12:02	Jim	Air Conditioner	Y	Y	74	00:05:22	5
23	01-01-2016 12:02	Dan	Fridge	Y	Y	89	00:05:50	5
24	01-01-2016 12:02	Martha	Air Conditioner	N	N			4
25	01-01-2016 12:02	Joe	Air Conditioner	Y	Y	68	00:05:25	2
26	01-01-2016 12:30	Diane	Television	Y	Y	97	00:04:09	3
27	01-01-2016 12:30	Dan	Toaster	N	N			4
28	01-01-2016 12:40	Joe	Television	Y	Y	39	00:04:00	3
29	01-01-2016 12:40	Martha	Washing Machine	Y	Y	51	00:02:34	4
30	01-01-2016 12:40	Joe	Air Conditioner	Y	Y	106	00:02:09	4
31	01-01-2016 12:40	Stewart	Television	Y	Y	107	00:05:55	3
32	01-01-2016 13:24	Joe	Fridge	Y	Y	22	00:05:08	3
33	01-01-2016 13:24	Joe	Television	Y	Y	122	00:02:08	4
34	01-01-2016 13:33	Diane	Air Conditioner	Y	Y	57	00:06:49	3
35	01-01-2016 13:33	Jim	Toaster	Y	N	53	00:01:44	2
36	01-01-2016 13:42	Becky	Television	Y	Y	119	00:01:31	5
37	01-01-2016 13:42	Diane	Television	N	N			4
38	01-01-2016 13:42	Martha	Air Conditioner	Y	N	20	00:01:12	2

## INSERT A PIVOT TABLE

**STEP 2:** TO INSERT A PIVOT TABLE, SELECT YOUR DATA RANGE, GO TO THE “INSERT” TAB, AND CLICK ON “PIVOTTABLE.” CHOOSE WHERE YOU WANT THE PIVOT TABLE TO BE PLACED!



FUTURE VISION COMPUTERS PIVOT TABLES - Excel (Product Activation Failed)

File Home Insert Page Layout Formulas Data Review View Help PivotTable Analyze Design Tell me what you want to do

PivotTable Recommended Tables SmartArt Pictures Shapes Screenshot Recommended Charts Charts PivotChart Sparklines Filters Links Text Header WordArt Signature Object Equation Symbol Symbols

H10 Greg

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CALL CENTER DATASET

	Resolved	Y	X					
	Count of Satisfaction rating	Column Labels						
	Row Labels	Air Conditioner	Fridge	Television	Toaster	Washing Machine	Grand Total	
7	Becky		31	23	35	33	32	154
8	Dan		36	26	46	42	27	177
9	Diane		28	31	43	35	31	168
10	Greg		28	27	35	32	33	155
11	Jim		35	38	33	31	36	173
12	Joe		35	33	35	38	28	169
13	Martha		27	29	30	30	36	152
14	Stewart		32	35	30	33	33	163
15	Grand Total		252	242	287	274	256	1311

PivotTable Fields

Choose fields to add to report:

Search

Call Id  
 Date  
 Agent  
 Department  
 Answered (Y/N)  
 Resolved  
 Speed of Answer  
 AvgTalkDuration  
 Satisfaction rating

More Tables...

Drag fields between areas below:

Filters: Resolved

Columns: Department

Rows: Agent

Values: Count of Satisfaction r...

Defer Layout Update

Sheet1 Data +

Ready Accessibility: Investigate

Type here to search

12:31 28-10-2024 ENG

# CHOOSE YOUR FIELDS

**STEP 3: TO CHOOSE YOUR FIELDS, DRAG AND DROP FIELDS INTO ROWS, COLUMNS, VALUES, AND FILTERS. THIS LETS YOU CUSTOMIZE HOW YOUR DATA IS DISPLAYED!**

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Agent	Satisfaction rating	Grand Total
Becky	32	154
Dan	27	177
Diane	31	168
Greg	33	155
Jim	36	173
Joe	28	169
Martha	36	152
Stewart	33	163
<b>Grand Total</b>	<b>256</b>	<b>1311</b>

## ANALYZE YOUR DATA

**STEP 4:** TO ANALYZE YOUR DATA, EXPLORE DIFFERENT VIEWS OF YOUR DATA BY REARRANGING FIELDS. TRY DIFFERENT CALCULATIONS LIKE SUM, AVERAGE, OR COUNT FOR INSIGHTS!



The screenshot shows a Microsoft Excel window with a PivotTable set up. The PivotTable is titled "CALL CENTER DATASET" and contains data about resolved calls across different agents and satisfaction ratings. The PivotTable Tools ribbon tab is active, and a red arrow points to the "Refresh" button in the Data group. The PivotTable Fields pane on the right lists fields such as Call Id, Date, Agent, Department, Answered (Y/N), Resolved, Speed of Answer, AvgTalkDuration, and Satisfaction rating.

Resolved	Y						
Count of Satisfaction rating	Column Labels						
Row Labels	Air Conditioner	Fridge	Television	Toaster	Washing Machine	Grand Total	
Becky		31	23	35	33	32	154
Dan		36	26	46	42	27	177
Diane		28	31	43	35	31	168
Greg		28	27	35	32	33	155
Jim		35	38	33	31	36	173
Joe		35	33	35	38	28	169
Martha		27	29	30	30	36	152
Stewart		32	35	30	33	33	163
<b>Grand Total</b>		<b>252</b>	<b>242</b>	<b>287</b>	<b>274</b>	<b>256</b>	<b>1311</b>

## REFRESH YOUR DATA

**STEP 5: IF YOUR ORIGINAL DATA CHANGES, DON'T FORGET TO REFRESH YOUR PIVOT TABLE! RIGHT-CLICK THE PIVOT TABLE AND SELECT "REFRESH" TO UPDATE IT.**



	Call Id	Date	Agent	Department	Answered (Y/N)	Resolved	Speed of Answer	AvgTalkDuration	Satisfaction rating	J	K	L	M	N	O	P	Q	R	S
1	ID0001	01-01-2016 9:12	Diane	Washing Machine	Y	Y	109	00:02:23	3										
2	ID0002	01-01-2016 9:12	Becky	Air Conditioner	Y	N	70	00:04:02	3										
3	ID0003	01-01-2016 9:47	Stewart	Washing Machine	Y	Y	10	00:02:11	3										
4	ID0004	01-01-2016 9:47	Greg	Washing Machine	Y	Y	53	00:00:37	2										
5	ID0005	01-01-2016 10:00	Becky	Toaster	Y	Y	95	00:01:00	3										
6	ID0006	01-01-2016 10:00	Stewart	Air Conditioner	N	N	24	00:03:40	2										
7	ID0007	01-01-2016 10:22	Diane	Toaster	Y	Y	22	00:00:38	4										
8	ID0008	01-01-2016 10:22	Diane	Toaster	Y	Y	15	00:06:38	4										
9	ID0009	01-01-2016 11:13	Greg	Fridge	Y	Y	78	00:01:04	3										
10	ID0010	01-01-2016 11:13	Jim	Television	Y	Y	50	00:00:32	4										
11	ID0011	01-01-2016 11:15	Joe	Toaster	N	N	84	00:03:34	3										
12	ID0012	01-01-2016 11:15	Greg	Toaster	Y	Y	45	00:05:32	5										
13	ID0013	01-01-2016 11:52	Joe	Toaster	Y	Y	68	00:05:25	2										
14	ID0014	01-01-2016 11:52	Martha	Washing Machine	Y	Y	97	00:04:09	3										
15	ID0015	01-01-2016 11:55	Becky	Fridge	Y	Y	89	00:05:44	3										
16	ID0016	01-01-2016 11:55	Becky	Fridge	Y	Y	63	00:05:26	2										
17	ID0017	01-01-2016 11:57	Greg	Air Conditioner	Y	Y	106	00:02:09	4										
18	ID0018	01-01-2016 11:57	Becky	Fridge	N	N	107	00:05:55	3										
19	ID0019	01-01-2016 12:01	Jim	Television	N	N	22	00:05:08	3										
20	ID0020	01-01-2016 12:01	Jim	Washing Machine	Y	Y	122	00:02:08	4										
21	ID0021	01-01-2016 12:02	Jim	Air Conditioner	Y	Y	57	00:05:22	5										
22	ID0022	01-01-2016 12:02	Dan	Fridge	Y	Y	89	00:05:50	5										
23	ID0023	01-01-2016 12:02	Martha	Air Conditioner	N	N	101	00:02:27	3										
24	ID0024	01-01-2016 12:02	Joe	Air Conditioner	Y	Y	106	00:02:09	4										
25	ID0025	01-01-2016 12:30	Diane	Television	Y	Y	107	00:05:55	3										
26	ID0026	01-01-2016 12:30	Dan	Toaster	N	N	51	00:05:08	3										
27	ID0027	01-01-2016 12:40	Joe	Television	Y	Y	122	00:02:08	4										
28	ID0028	01-01-2016 12:40	Martha	Washing Machine	Y	Y	57	00:05:55	3										
29	ID0029	01-01-2016 12:40	Joe	Air Conditioner	Y	Y	119	00:01:44	2										
30	ID0030	01-01-2016 12:40	Stewart	Television	Y	Y	119	00:01:31	5										
31	ID0031	01-01-2016 13:24	Joe	Fridge	Y	Y	101	00:05:25	2										
32	ID0032	01-01-2016 13:24	Joe	Television	Y	Y	106	00:02:09	4										
33	ID0033	01-01-2016 13:33	Diane	Air Conditioner	Y	Y	107	00:05:55	3										
34	ID0034	01-01-2016 13:33	Jim	Toaster	Y	N	53	00:01:44	2										
35	ID0035	01-01-2016 13:42	Becky	Television	Y	Y	119	00:01:31	5										
36	ID0036	01-01-2016 13:42	Diane	Television	N	N	101	00:05:55	3										
37	ID0037	01-01-2016 13:42	Becky	Air Conditioner	Y	Y	106	00:02:09	4										

## TIPS FOR EFFECTIVE USE

- USE MEANINGFUL FIELD NAMES.
- EXPERIMENT WITH DIFFERENT LAYOUTS.
- UTILIZE SLICERS FOR DYNAMIC FILTERING!



# READY TO TAKE YOUR DATA ANALYSIS TO THE NEXT LEVEL?

PIVOT TABLES ARE YOUR BEST FRIEND FOR SUMMARIZING COMPLEX DATASETS! WHAT INSIGHTS DO YOU HOPE TO UNCOVER? SHARE BELOW!

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