

PIVOT - TABLE

Analysis

(1) Create a Pivot table from given data

Method - 1

• Select all your data

↓
Insert :- Pivot Table

Dialogue Box (Range)

↓
Select Table (Range) for
pivot table

Method - 2

• First convert all your data into

table (ctrl + T)

so that on editing any cell will automatic

change pivot table

↓

Name the table

↓

Select any cell of table

↓

Upper Tab : \rightarrow Summarize with pivot table
(design)

By default excel puts pivot table
in new excel sheet

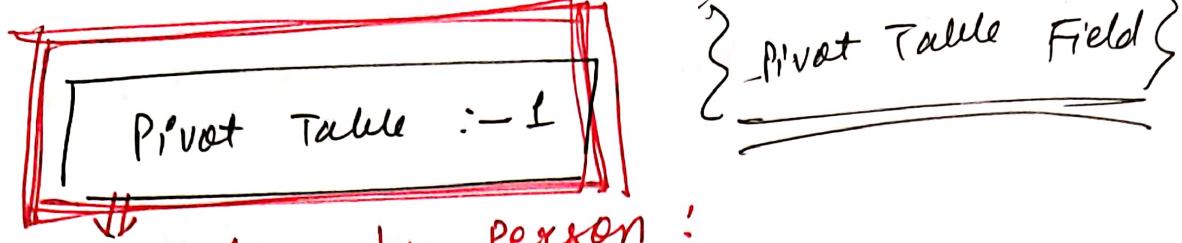
(2) Understanding & setting up pivot table
after launching it

- After pivot table is created

You see - "Pivot Field Table" at right

corner

- consist of 4 boxes:-
 - (i) Filter
 - (ii) columns
 - (iii) rows
 - (iv) values



Total Sales by person :

- Takes sales person and put it in Row area
↓
Take amount & drag to values or right click on amount (pivot table field) and then select add to values.

* By default:
→ Depending upon type of field you are putting, pivot table will automatically either :- sum, count those things.

* Now a pivot table → total sales by person is created

Now do some formatting

* select any amount cell
↓
right click
↓
Number format
↓
currency
↓
decimal, thousands separator, £

* change pivot table colour scheme of from design.

* Select cell of table
↓
design
↓
enable "Banded Rows"
so that every row is
colour coded differently to
make it more readable.

Report - 2

Pivot-Table

Sales by Person & Geography

- * Insert new pivot table from original data



Add (sales person + geography) → Rows

Add (Amount) → Values



2 level Pivot table is created

(all making vertical)

- * To change from vertical to horizontal :-

Add (sales person) → Rows

Add (geography) → columns

Add (Amount) → values

Report - 3
Pivot Table
Sales by Person

↓
filter by geography

- Insert new pivot table from original data



Add : Geography → filter
sales → rows
Amount → values



It will then give a filtering option for geography on top of pivot table

e.g:

Geography	All <input checked="" type="checkbox"/>
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Report - 4

Top 10 products by customers

create new pivot table



Add : → product → Rows

Sum of customer → Values



click on filter of product



value filter



Top 10



then select it

* //Add sales person filter://

Add : → sales person → filters



Top 10 product for a particular person.

Report - 5

Interactive Pivot Report

- Create a new pivot table



Add: sales person → Rows
Amount → values



right click on geography

↓
Add as a slicer

visual filter

- * Slicer : it is like

Report - 6

Pivot Chart

- Select any cell of original data



Insert :



Pivot chart
(automatic if will bring to
new sheet)



"Pivot chart Field" dialogue box
opens same as "Pivot Table Field"



Add : geography → Axis / Rows
Amount → values



Format the chart as
prev. discussed.

Report - 7

Interactive Pivot Chart

- select your data



Insert: — Pivot chart



Pivot chart Field



Add: sales person → Axis / Rows
Amount → Value



right click on geography



Add as a slicer

by each country

⇒ enables to see separately



Decorate & formatting it

Report - 8 \Rightarrow

Bonus Report

Total & Percentage Report

- Insert a Pivot Table



Add :-

Sales Person \rightarrow Rows

Sum of Amount \rightarrow Values



Apply some formatting
to make it more attractive



Add! Amount \rightarrow Values



In new amount column \rightarrow right click

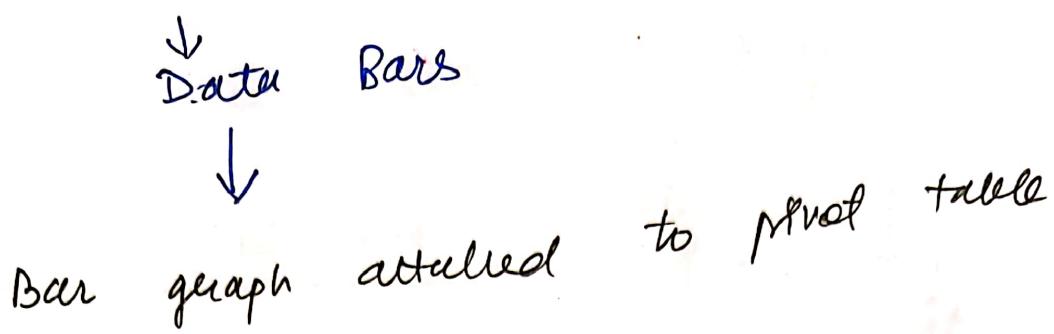
right click by selecting any
cell in new Amount column

\downarrow
show values as

\downarrow
% column Total

\downarrow
Name: Conditional Formatting





* New Data - - -

Updating Pivot Reports

⇒ Now we get extra new data
↓
copy it & load it in original
table by paste option
↓
Data
↓
refresh all

⇒ It will automatically update
all pivot table & charts -

V-LookUp

- ⇒ ask excel to lookup at my table
find out the record that has "—" in it & get me all its corresponding data.
- ⇒ = vlookup ("finding wala", where is data (total data range), 3, false)
↓
only applicable when data is sorted
which column we want to find for that
- ⇒ if vloop cannot find in the original data
it points :⇒ #NA#
- ↓
= iferror (vlookup - - - - - , "cannot find")
this message will be presented

Another formula for Vlookup'

= vlookup (Name, table name, column no. , false)

= vlookup (Rahul, sales, 3, false)

↓
An exact column
which detail we want

→ Index + Match

= match (value, table [column], 0)

0 → exact match

↳ gives index of value present in that column

= index (sales [sales person], match (----, sales [not sales], 0))