

PIVOT in Excel

Before starting Pivot, 3 things must be check

Source Data Checklist:

- (i) No Blank Columns – No Blank column within Header Row
- (ii) No Blank Rows – No Blank rows, especially Date
- (iii) No Merged Cells

Once we have the Clean Data, we can proceed for the next step:

AutoSave

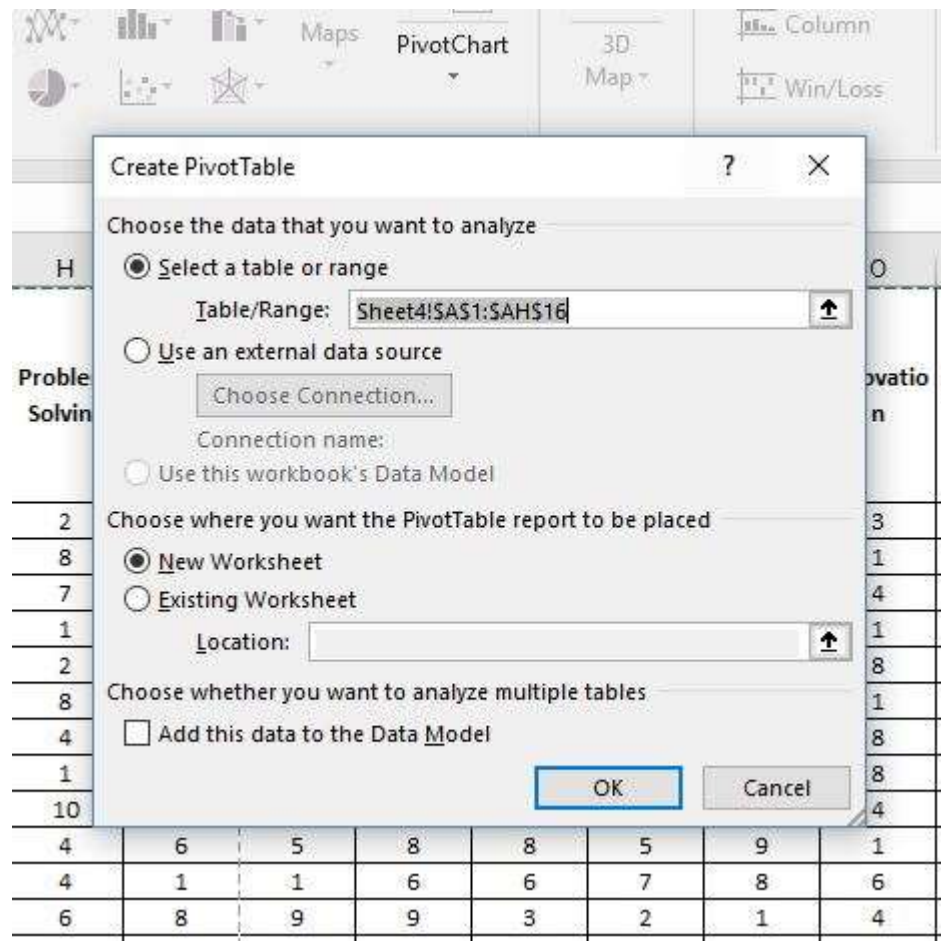
Step1: Click anywhere in the data set or select all the data

Step2: Go to INSERT tab in the ribbon and then click on the



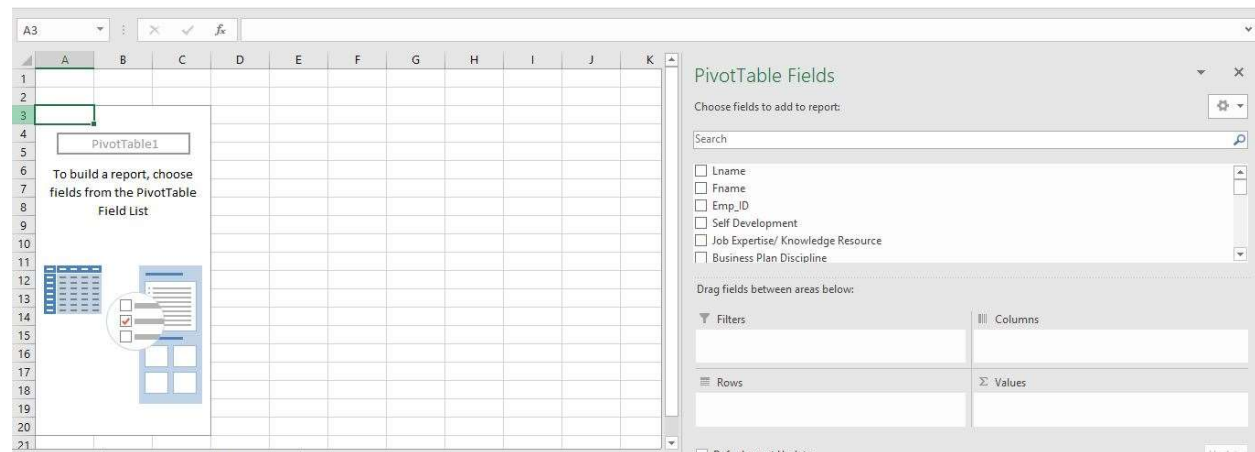
Pivot Table Button

It will automatically select the Table-Range, or you can do it manually too.



Click on 

Step3: It automatically added a new sheet to the workbook and created the pivot table area



On the right side of this pivot table fields list has appeared and this is basically the window which we are going to use to create the pivot table. And then down below is the area that we can dress those fields to create pivot table report.

Step4: Drag the Fname into the ROWS

The screenshot shows the Excel interface with a PivotTable Fields task pane on the right. The task pane is titled "PivotTable Fields" and has a tab labeled "Row Labels". The "Choose fields to add to report:" section contains a search bar and a list of fields: Lname, Fname (checked), Emp_ID, Self Development, Job Expertise/ Knowledge Resource, and Business Plan Discipline. Below this, the "Drag fields between areas below:" section shows three areas: Filters, Rows, and Columns. The "Rows" area contains the "Fname" field. The background shows an Excel spreadsheet with a list of names in column A and a "Grand Total" row at the bottom.

	A	B
1		
2		
3	Row Labels	
4	Andrew	
5	Angie	
6	Anne Marie	
7	Betty	
8	Blake	
9	Catherine	
10	Cody	
11	Gregory	
12	Joseph	
13	Kimberly	
14	London	
15	Manish	
16	Nancy	
17	Peter	
18	Robert	
19	Grand Total	
20		
21		

Step5: Drag the TOTAL into Values

PivotTable Fields

Choose fields to add to report:

Search

☐ Provide Direction
☐ Influence Others
☐ Communicate Effectively
☒ **TOTAL**

More Tables...

Drag fields between areas below:

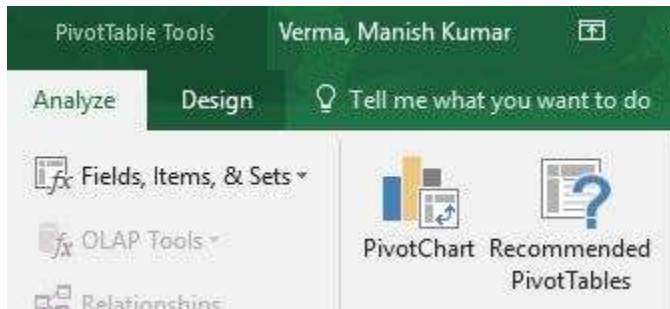
Filters	Columns

Rows	Values
Fname	Sum of TOTAL

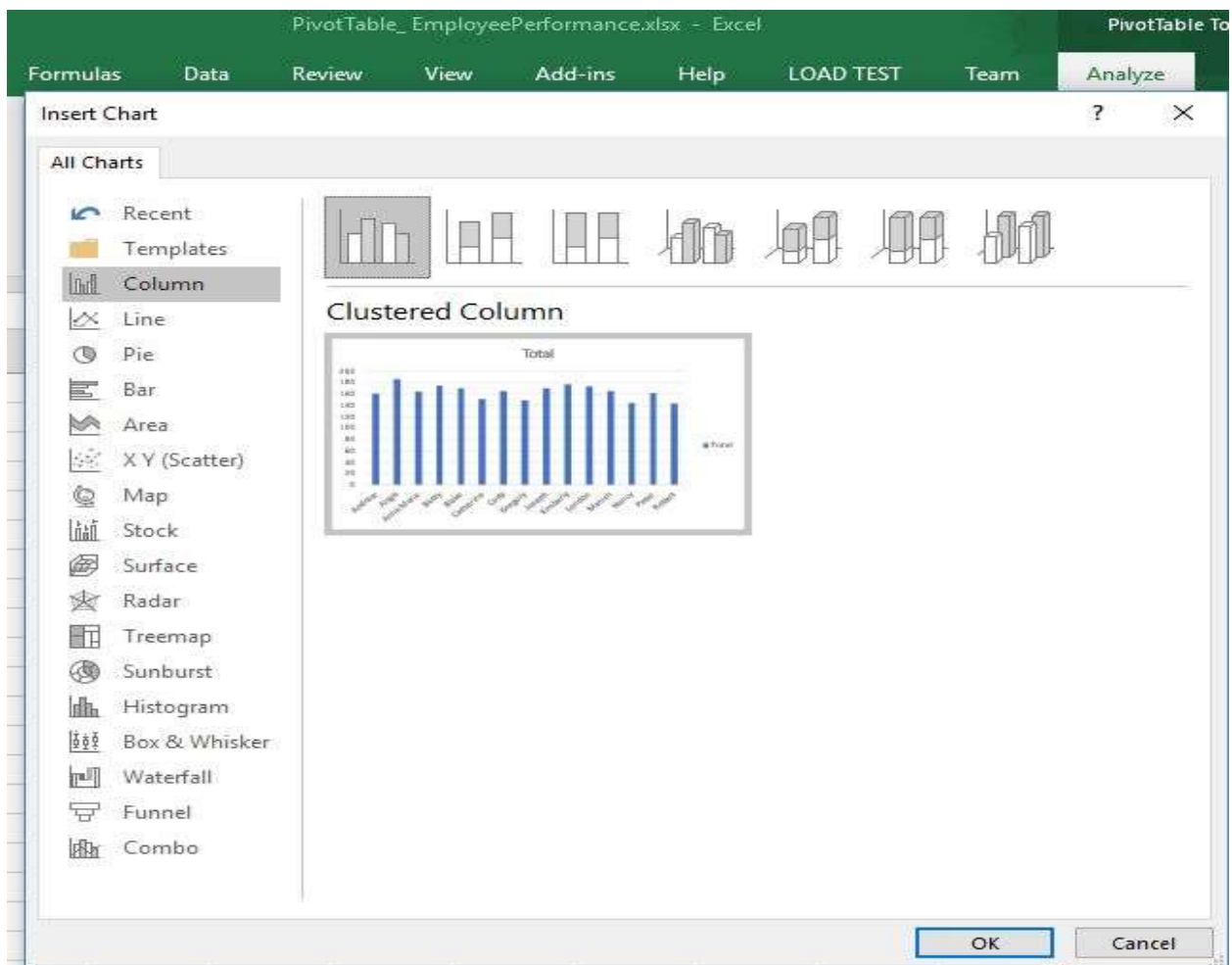
After dragging, sheet will look like this.

	A	B	C	D	E
1					
2					
3	Row Labels	Sum of TOTAL			
4	Andrew	161			
5	Angie	187			
6	Anne Marie	164			
7	Betty	175			
8	Blake	170			
9	Catherine	151			
10	Cody	165			
11	Gregory	149			
12	Joseph	170			
13	Kimberly	177			
14	London	174			
15	Manish	165			
16	Nancy	144			
17	Peter	162			
18	Robert	143			
19	Grand Total	2457			
20					
21					

Step6: To create Pivot chart, click on Analyze tab and then select PivotChart.



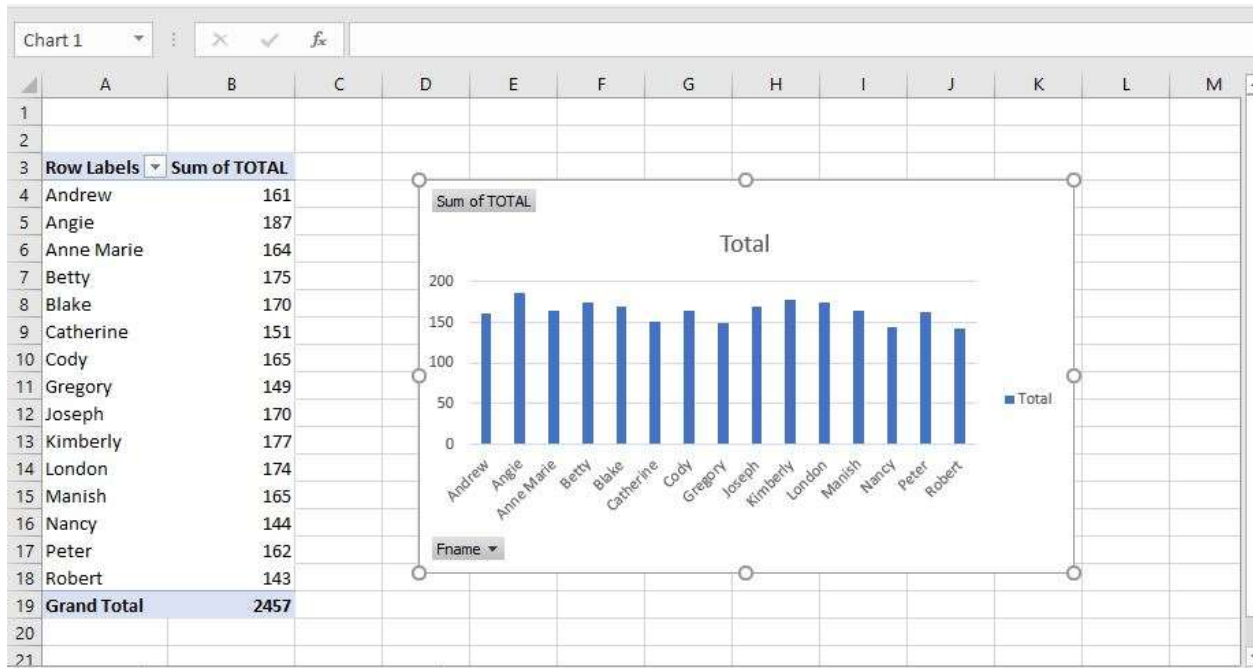
It will give options to create different type of charts.



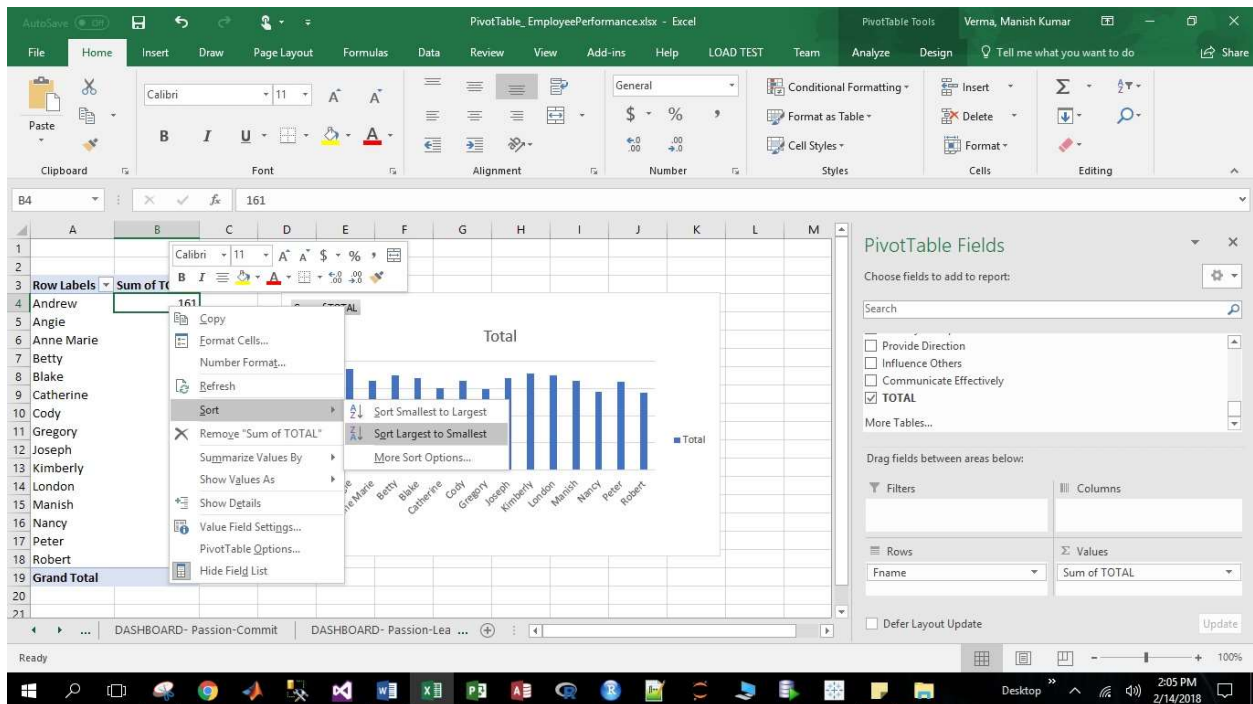
After selection of chart, click on

OK

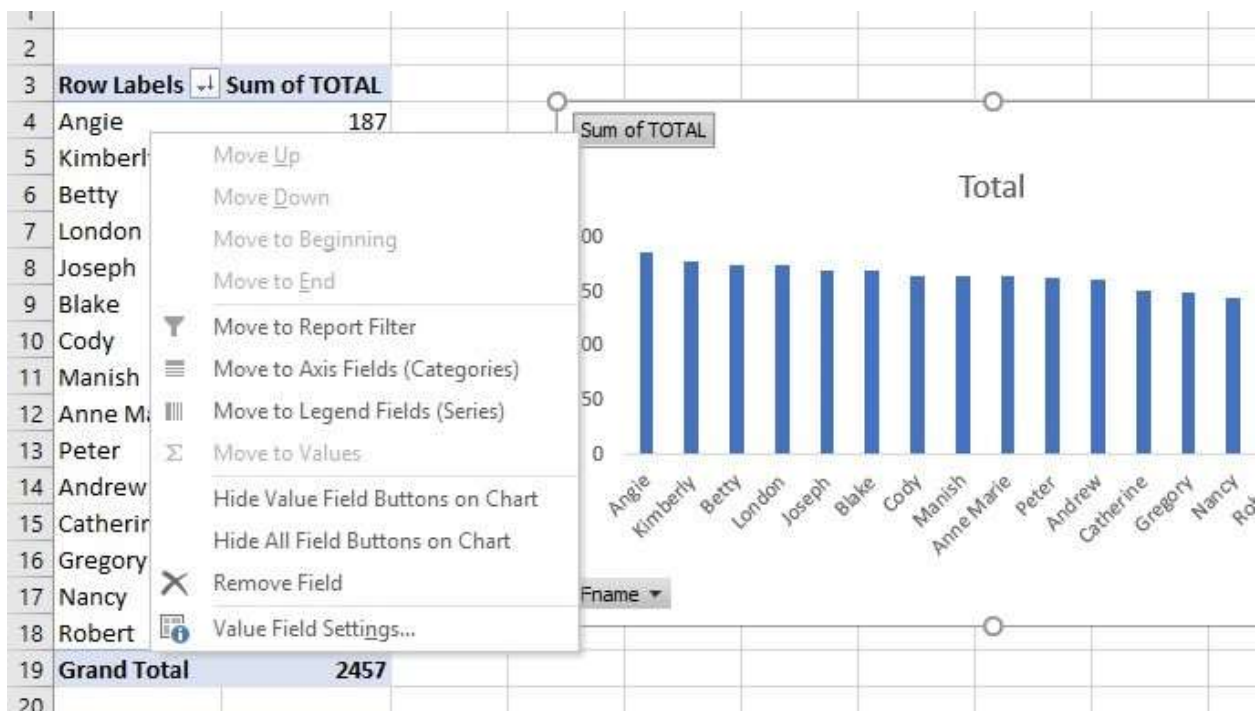
After clicking  , chart will pop-up.






We can also sort the data, by right clicking anywhere in the data, and then select Sort as per requirements.

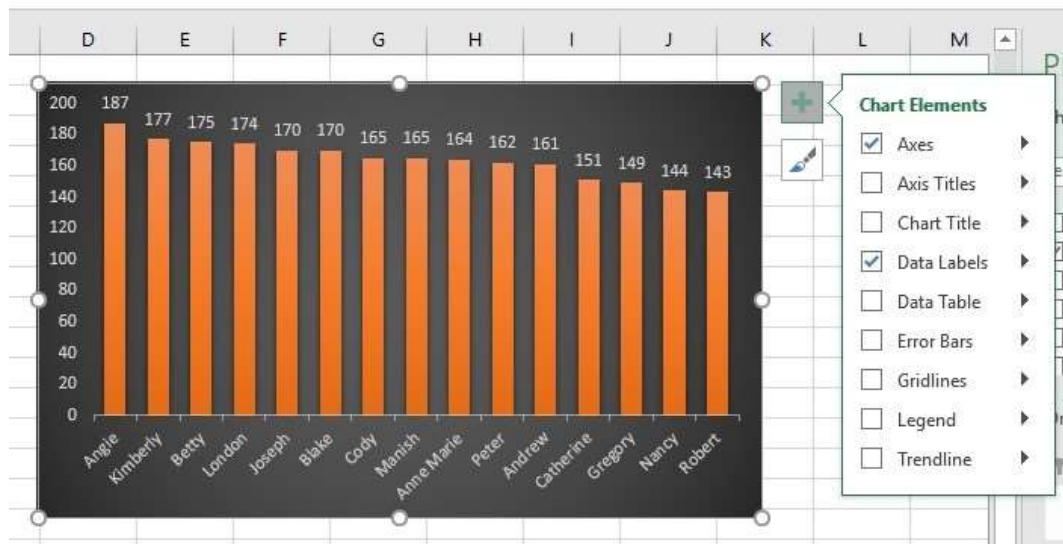



To hide any value buttons, right click on it then select as per requirements

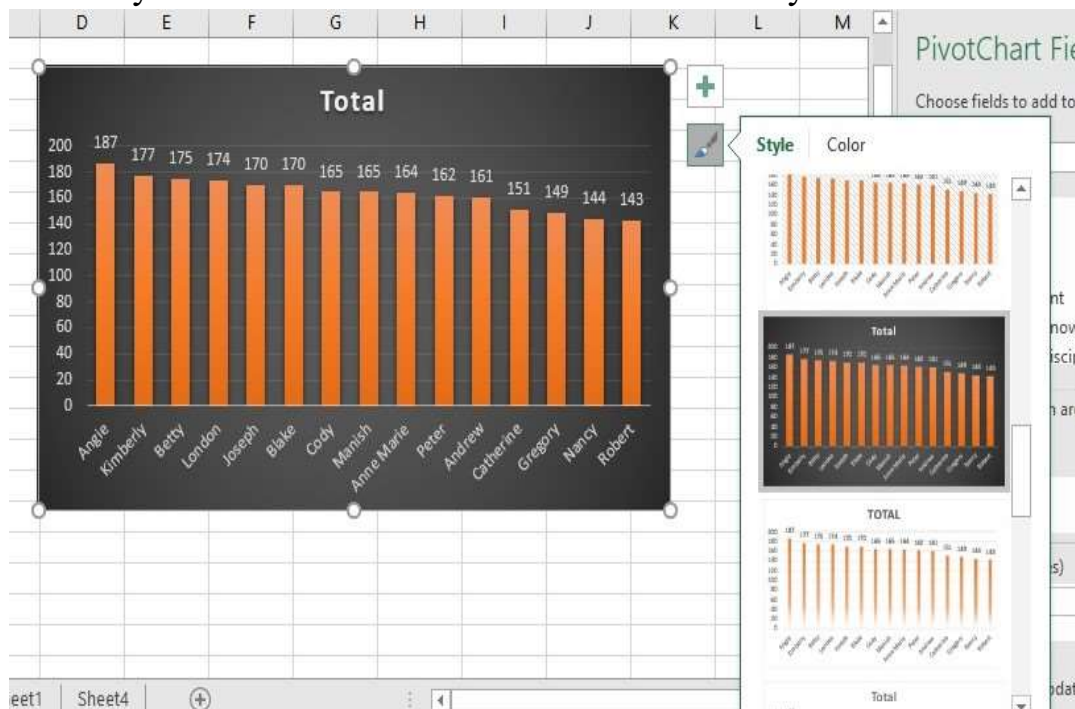


Step7: Click anywhere in chart area, you will see 2 options on right side of the chart (i) Chart Elements , and (ii) Chart Style .

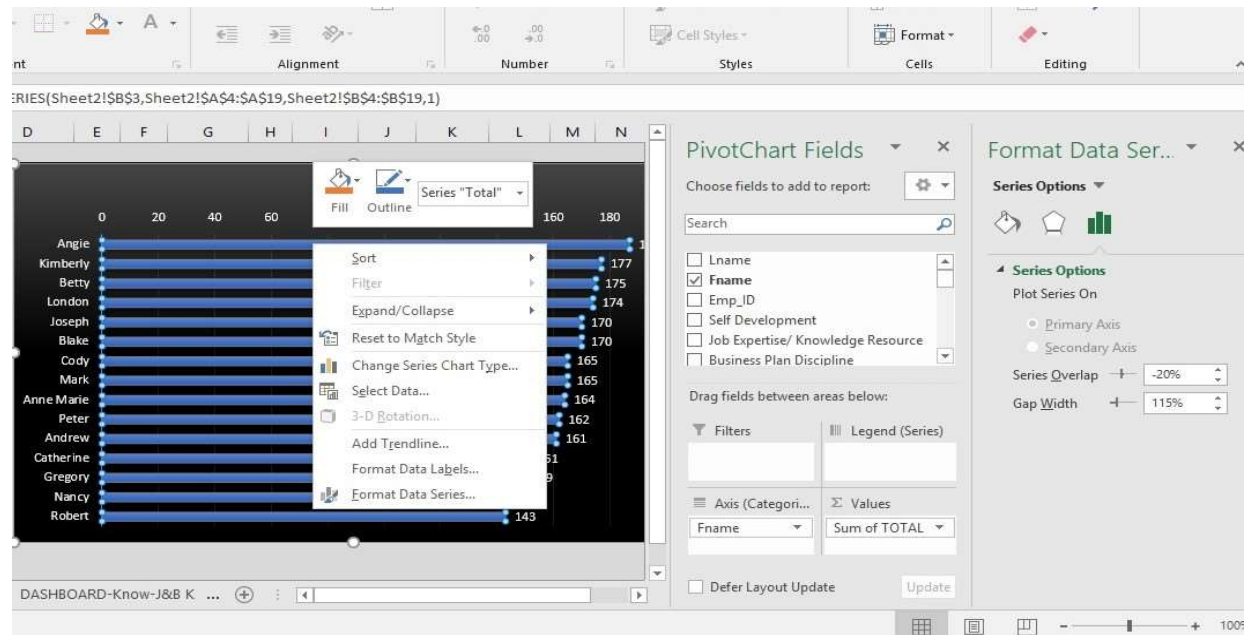
(i) Chart Elements : You can choose different Chart Elements



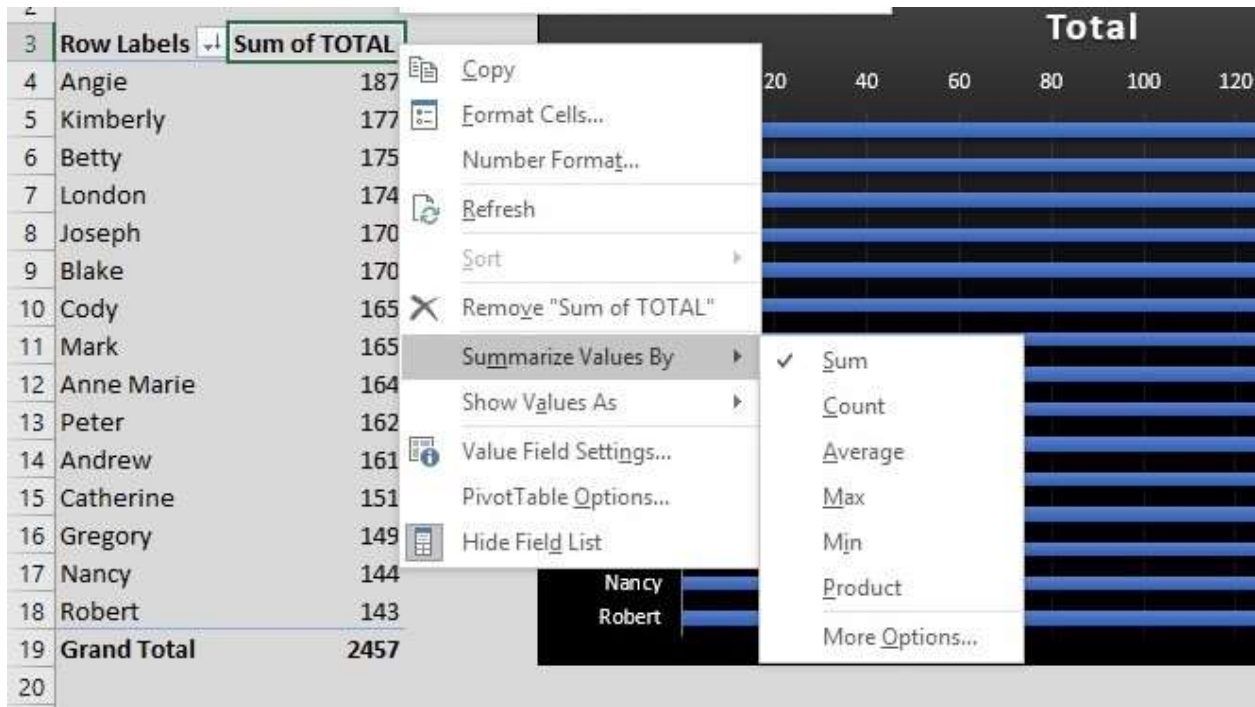
(ii)  Chart Style: You can choose different Chart Styles



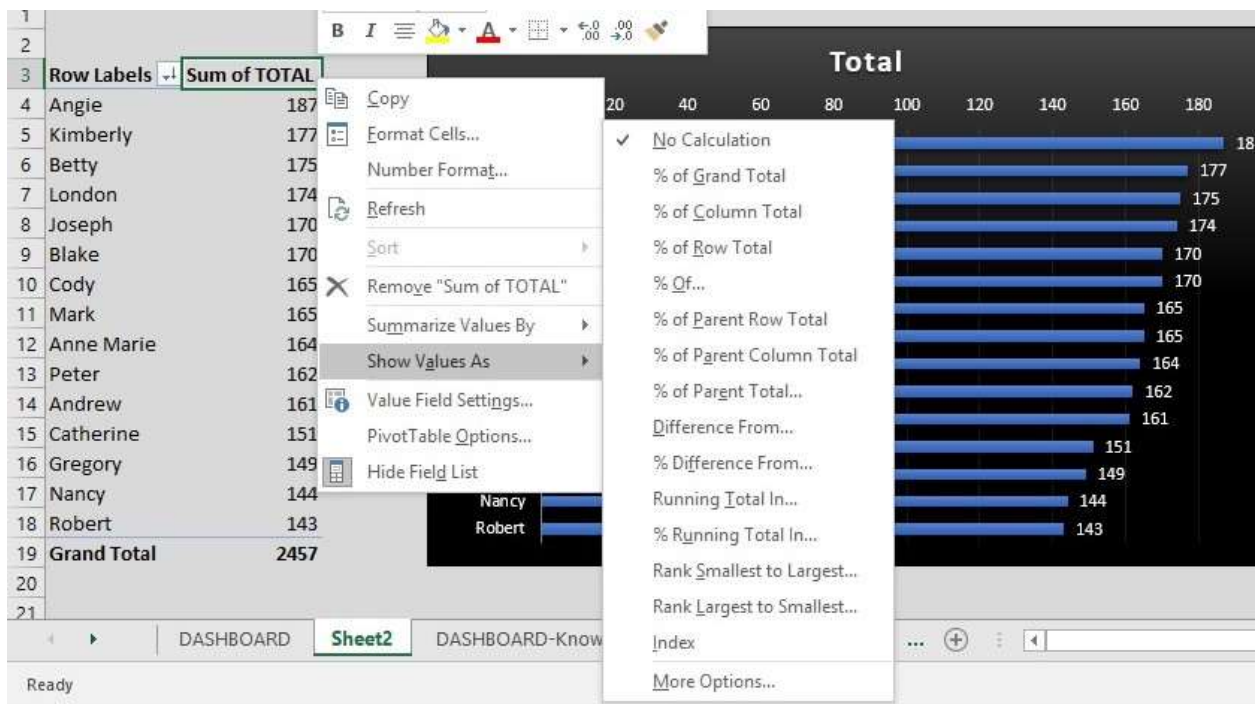
Step8: Right Click on any bar and go to format data series. On the right side of PivotChart fields, you will find it. You can select Gap width between bars.



Step9: We can also summarize value in different forms. Right click on **Sum of TOTAL** and select Summarize Values By. You can have options like, Sum, Count, Average etc.




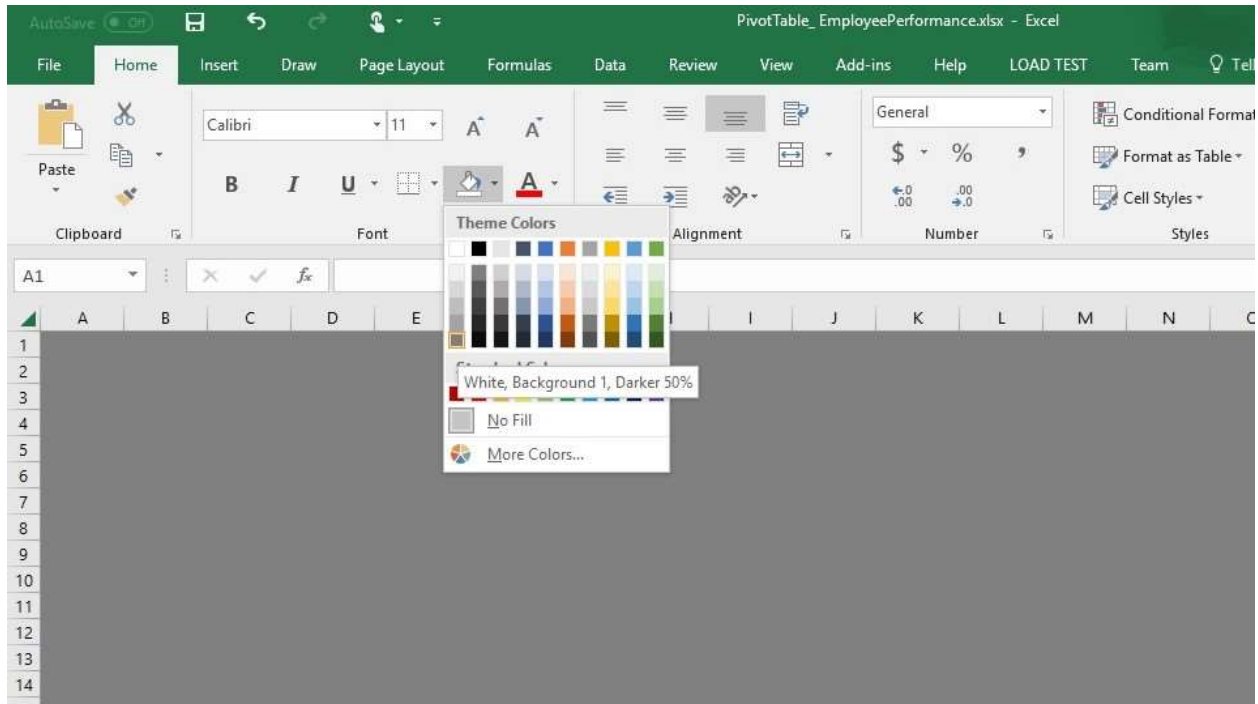
Or you can see the Values as by selecting Show Values As:



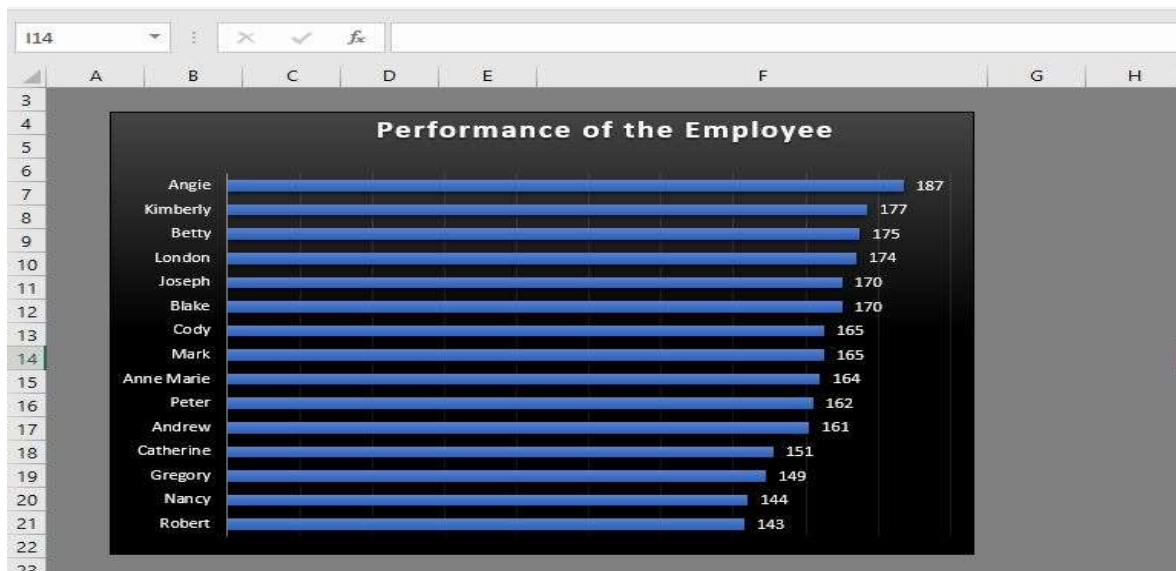
Creating an Interactive Dashboard

Step1: Click on left upper most corner of the table to select all the table or use Ctrl+A shortcut.

Step2: Click on  to fill the color as per requirement.



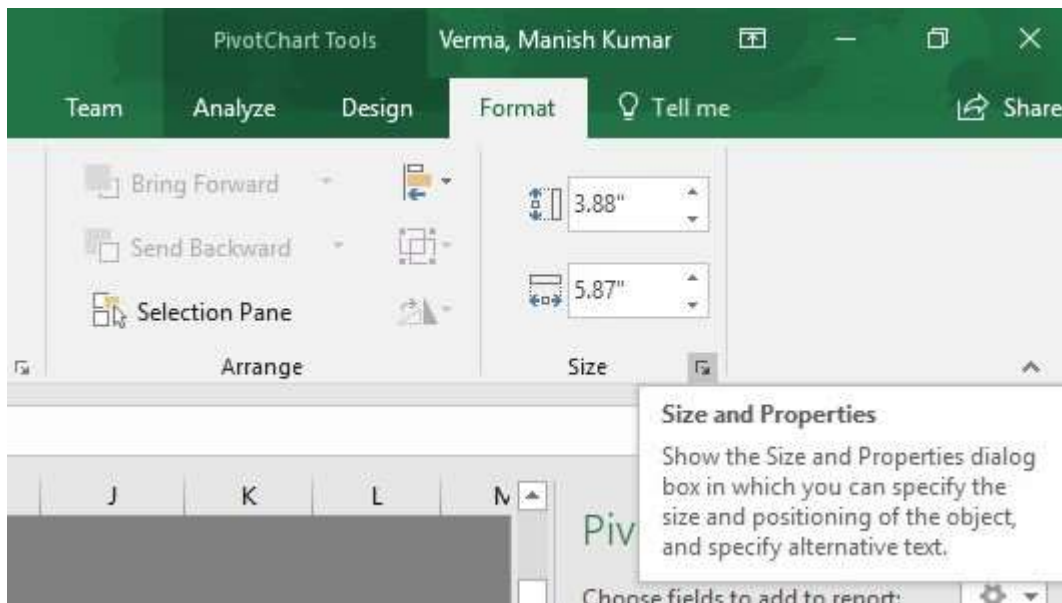
Step3: Copy and paste the Chart in the Sheet.



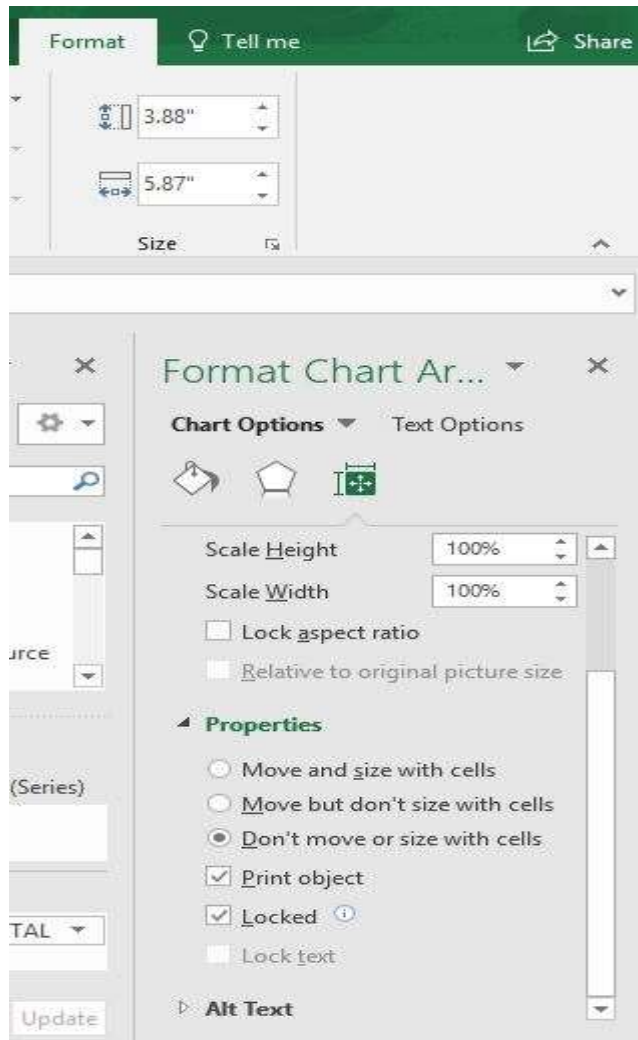
Step4: Making Columns or Rows wider can affect the size of the chart.



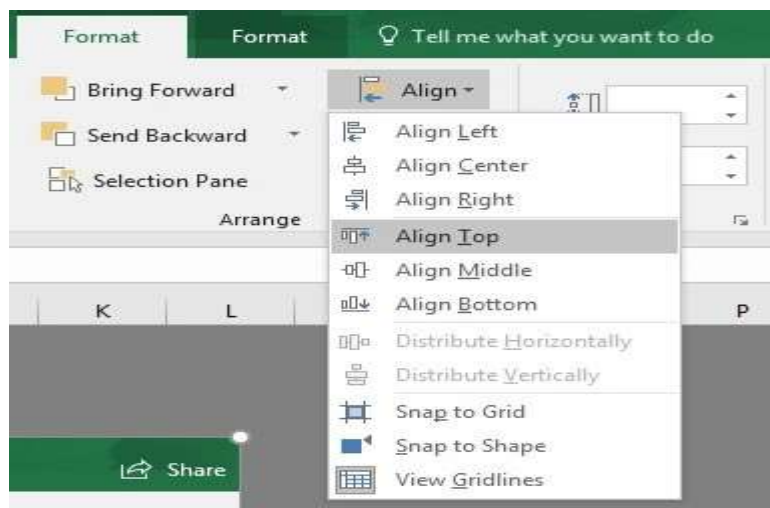
To prevent this, click on the chart, select Format Tab, and click on Size and Properties.



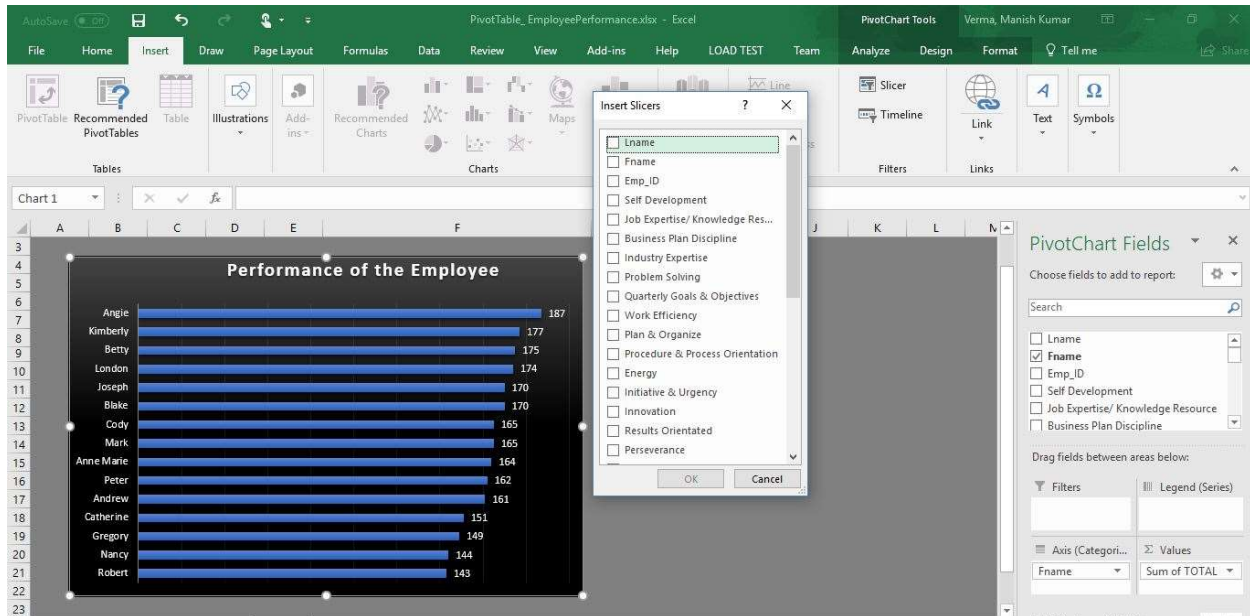
Select Don't move or size with cells.



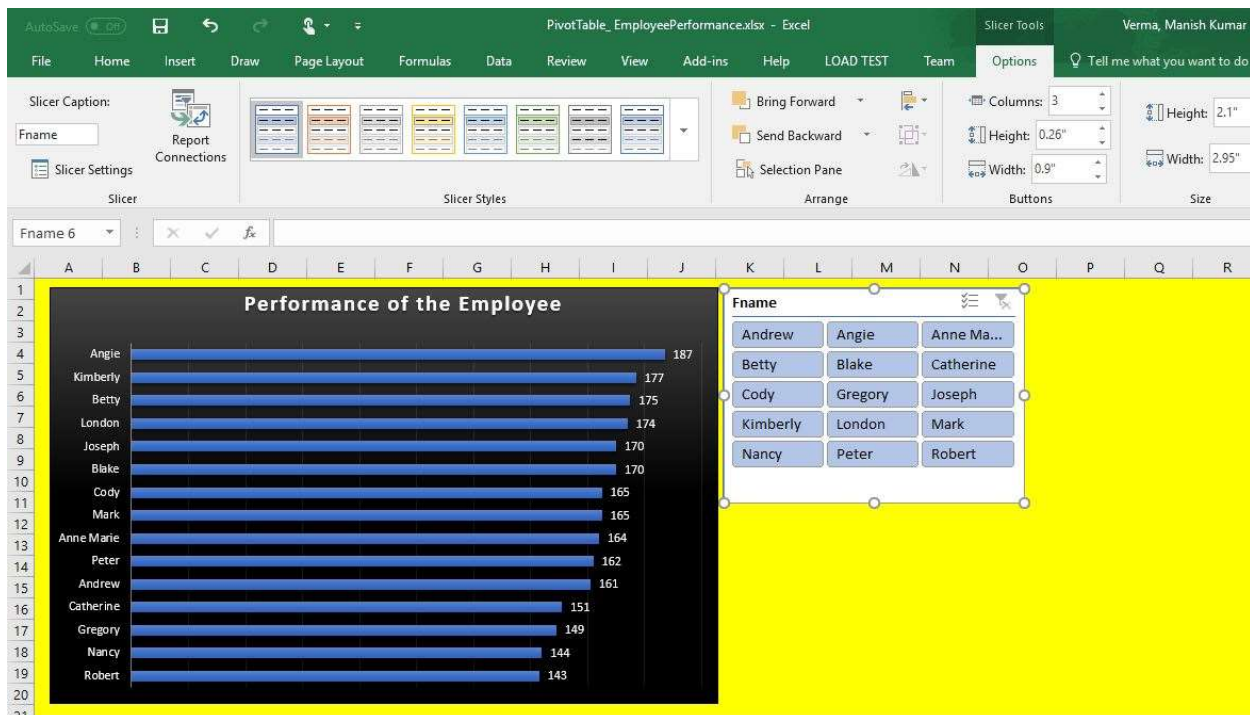
If, we have multiple Charts we can align them by clicking Format → Align




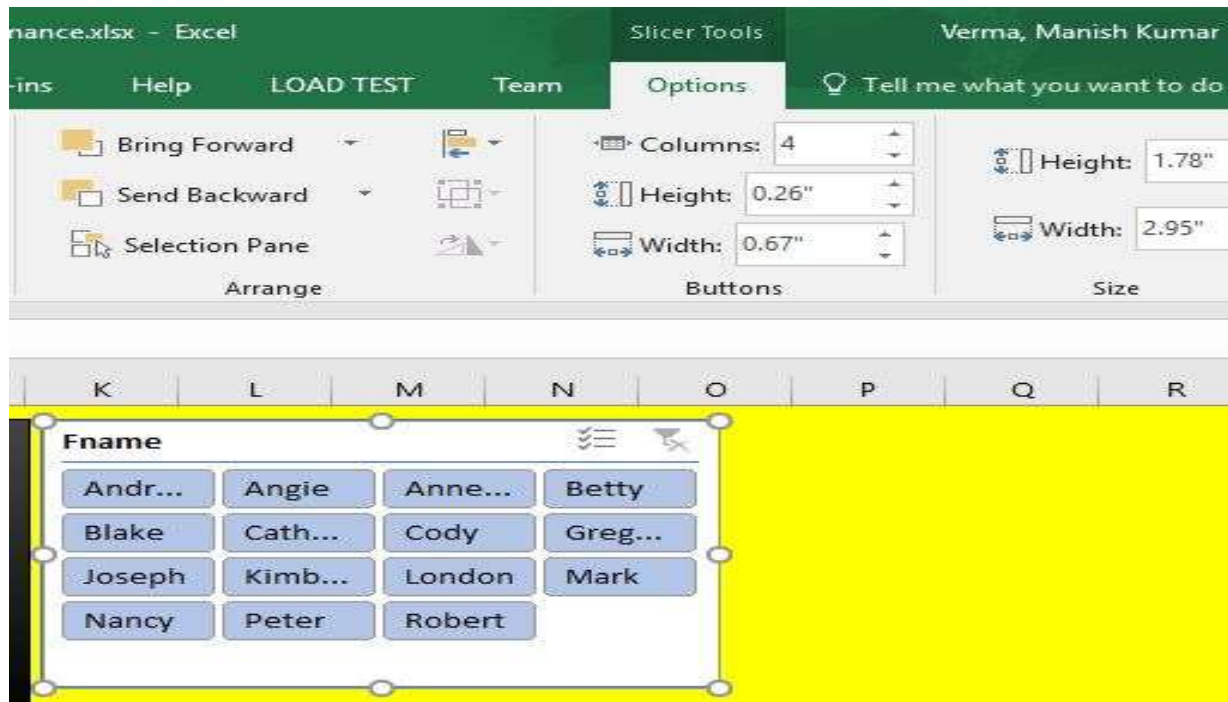
Step5: To add slicer, click on the chart, then select INSERT and click on slicer. It will give options for inserting slicers. Check boxes as per requirement.



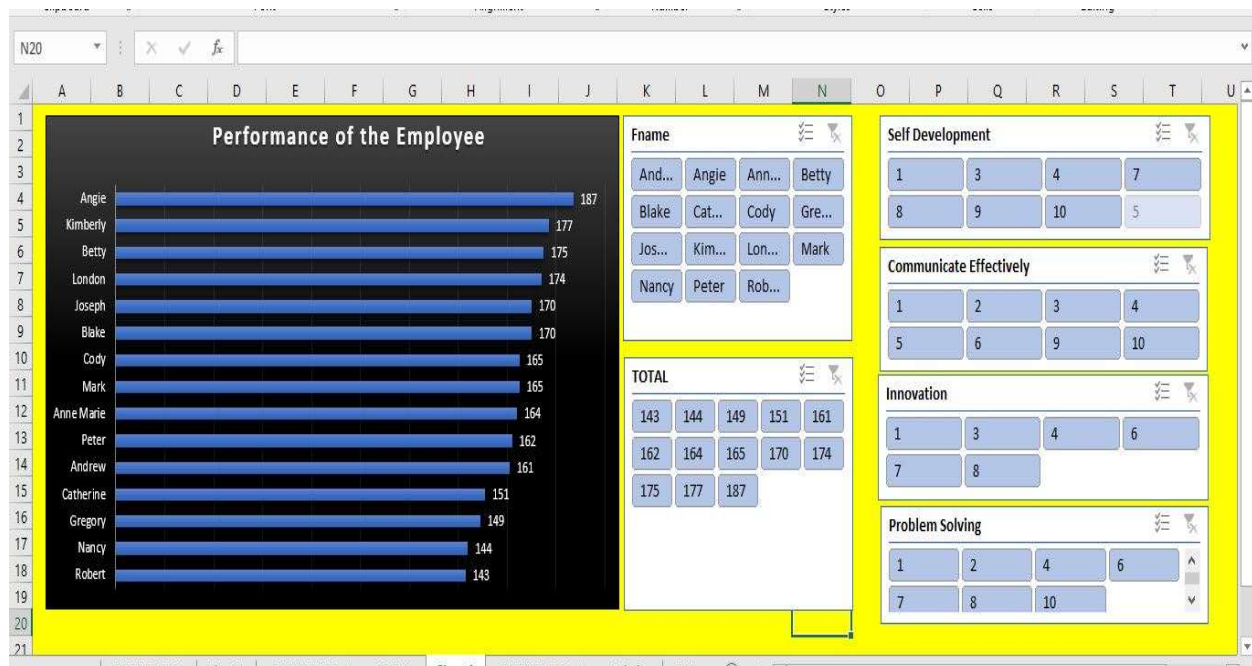
If, we choose Fname it will look like this.



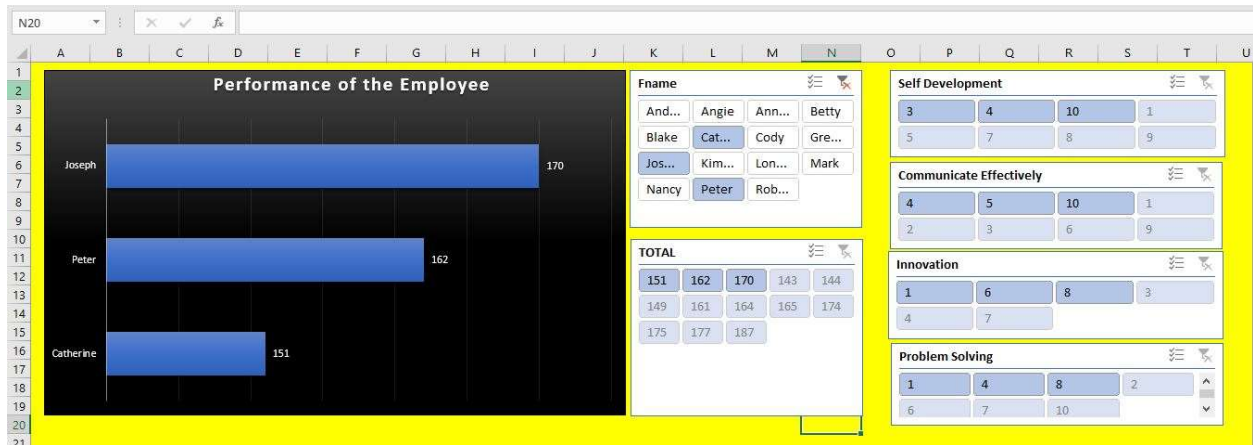
By clicking on Options  we can select Column size, Height, Width of the slicer.



Likewise, we can select multiple slicers:

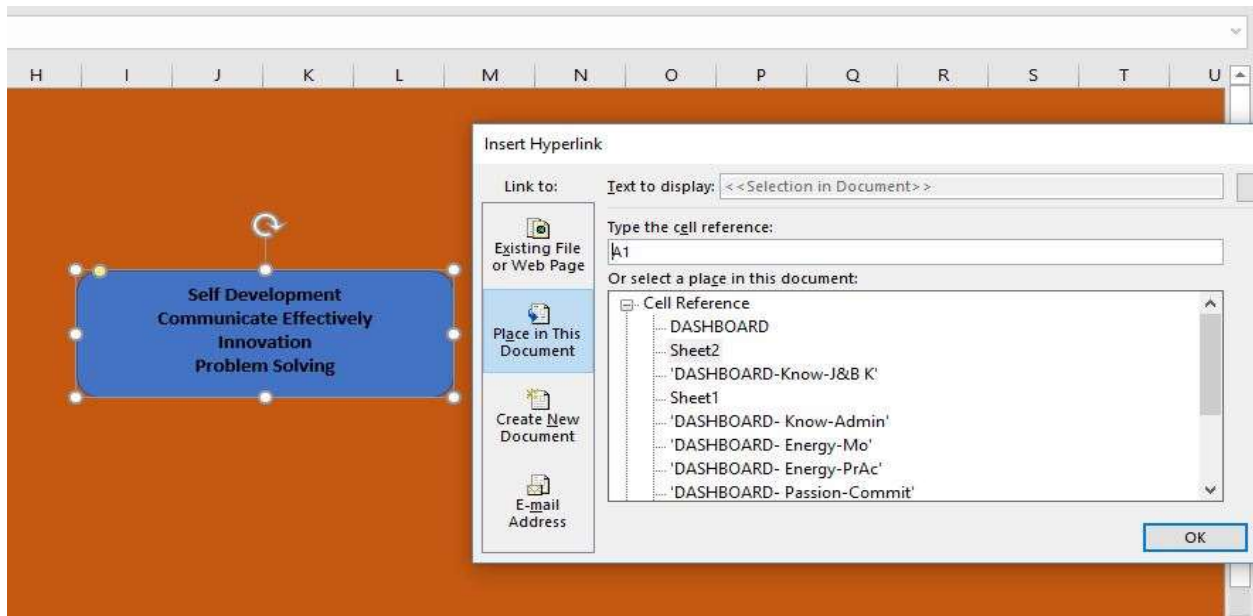


By pressing, Ctrl + (Multiple Fname) we can do comparison in between them, in other words we can say that we can filter.



To clear the filter, click on .

To communicate between Sheets, right click on the preferred Sign and select link. Select “Place in This Document” and click the Sheet name which you want to be linked.



Click 