Creating a Pivot Table in Microsoft Excel

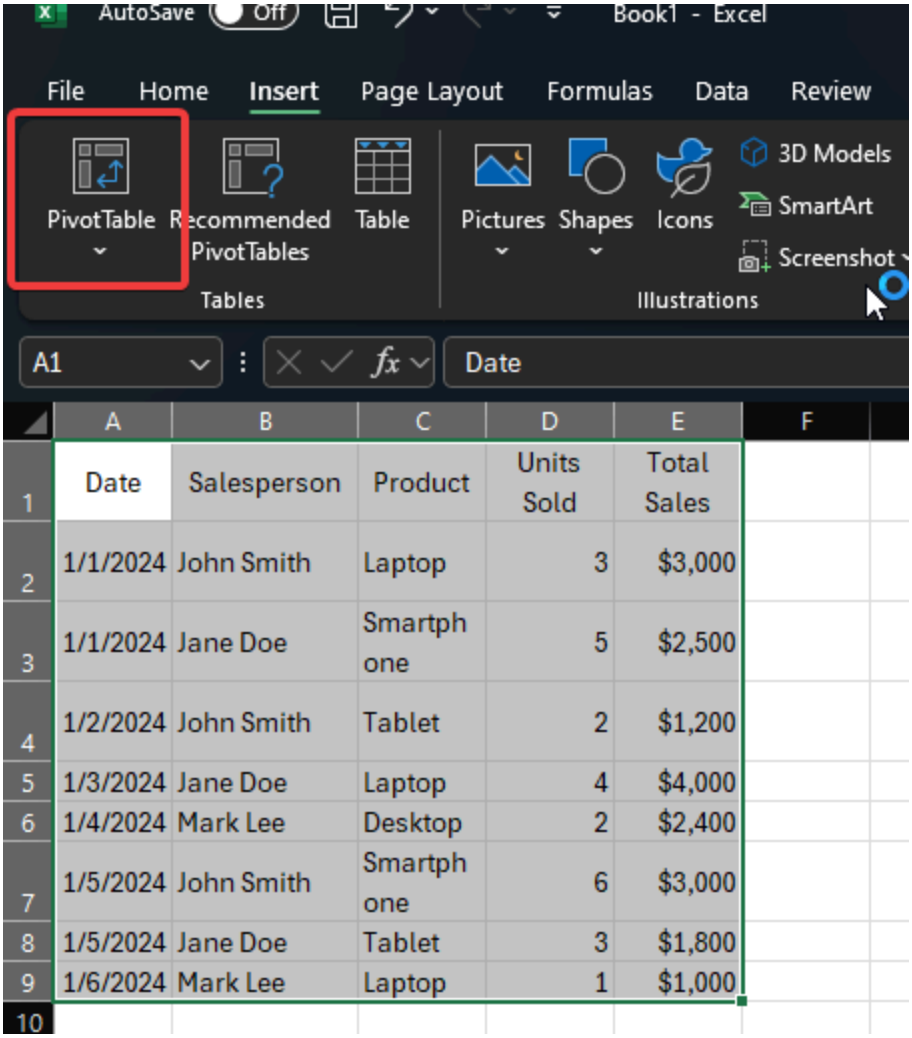
The audience for these instructions are beginner-level users of Microsoft Excel who are familiar with Microsoft Excel but may not be familiar with more advanced features and tools of Excel. The purpose of this guide is to introduce them to the Pivot Table feature and show them how to create one.

Possible Risks

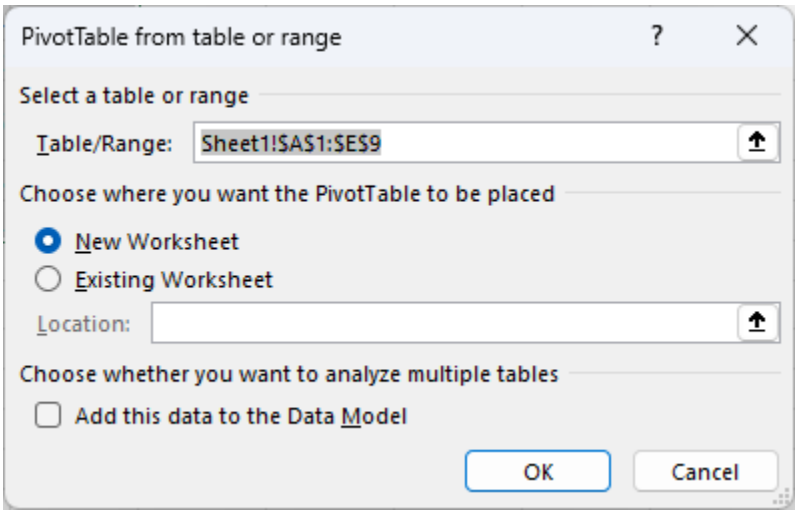
When following these instructions, it is important to keep in mind that your data must be properly formatted before beginning this guide, and should not be overly cluttered. Failure to do so may result in an improperly formatted pivot table or one that is difficult to read and comprehend.

Instructions

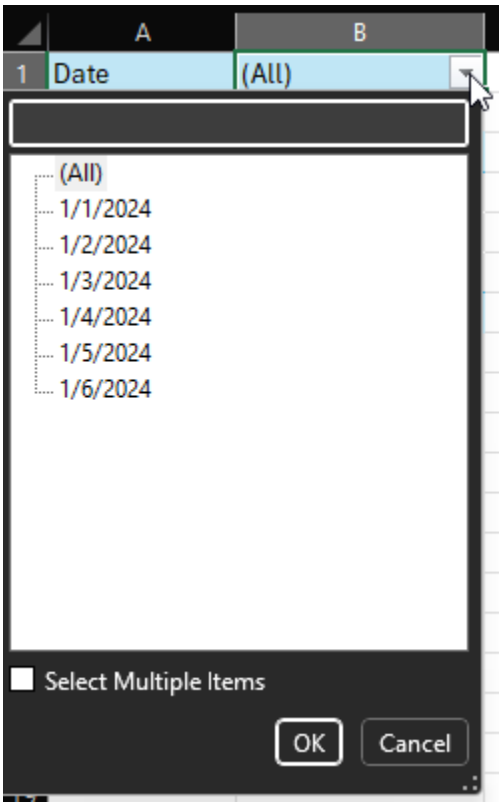
1) Prepare your data in an Excel workbook.
    a) Your data should be organized in a table format with column headers. There should be no empty rows or columns in the table. Failure to ensure there is no missing data can cause errors when generating the pivot table.
2) Select the full data range by clicking on the first cell, and dragging to select all rows and columns with your data.
3) Insert the Pivot Table by:
    a) Go to the Insert Tab
    b) Click on the PivotTable button, as pictured below:



c) A dialog box will open with your data range already selected, as pictured below. Choose whether you want to place the pivot table in a new worksheet or the existing worksheet. We recommend using a new sheet, as it is easier to work with. Select *OK* once you have selected this.



4) Once you select OK in the previous step, on the right side of your screen the PivotTable Fields pane will appear. This menu will allow you to drag and drop different fields into areas of the PivotTable.
    a) The *Rows* section is where you group your data by categories such as people, products or dates. To do so, drag a field into the Rows section.
    b) The *Values* section is where the numbers or data you want to summarize should go. Excel will perform calculations such as adding, counting or averaging the values of the field you put here. To do so, drag a field into the Values section.
    c) If you want to break up your data by another value, drag a field into the Columns section.
    d) If you want the ability to filter the PivotTable by a certain value, drag that field into the Filters section. This will add a dropdown menu to the top of the PivotTable where you can select a certain value for that field and filter the PivotTable, as pictured below.



5) You now have a PivotTable! You can continue to customize this utilizing the right side menu to highlight the data you want.

Date	(All)				
Sum of Total Sales	**Column Labels**				
Row Labels	**Desktop**	**Laptop**	**Smartphone**	**Tablet**	**Grand Total**
Jane Doe		4000	2500	1800	8300
John Smith		3000	3000	1200	7200
Mark Lee	2400	1000			3400
Grand Total	**2400**	**8000**	**5500**	**3000**	**18900**