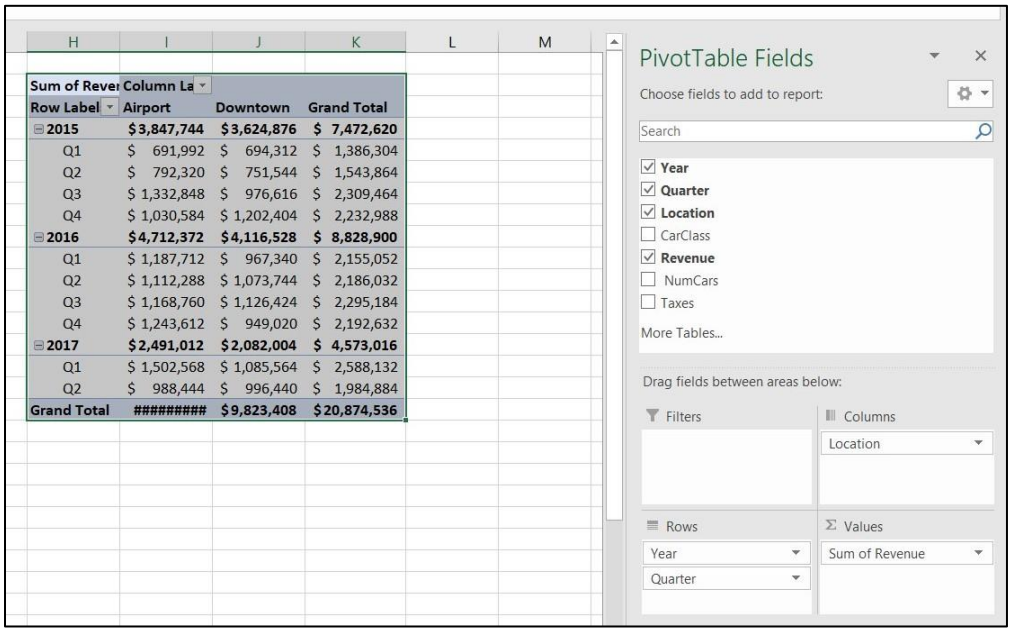
UNIVERSITY OF MARYLAND
University College

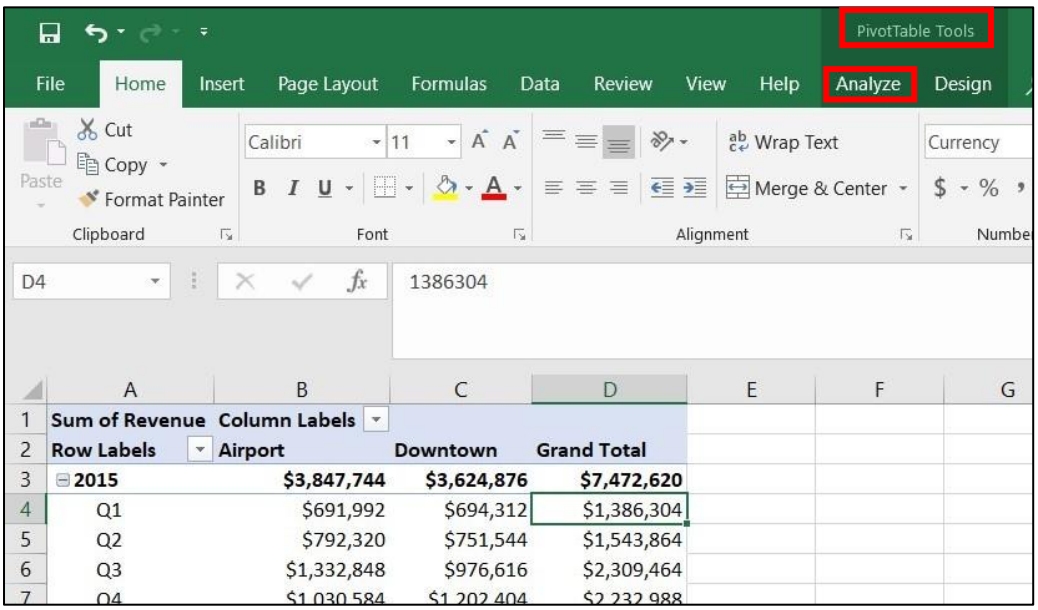
Learning Resource

Creating a Pivot Chart from a Pivot Table

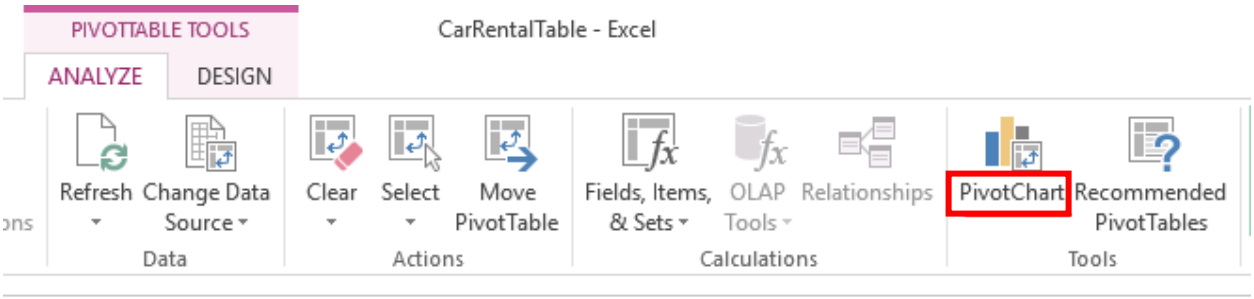
Pivot Charts give us the opportunity to add data visualization to our pivot table. For this tutorial, the Pivot Table created in the previous tutorial has been changed to the following (note the Fields chosen):



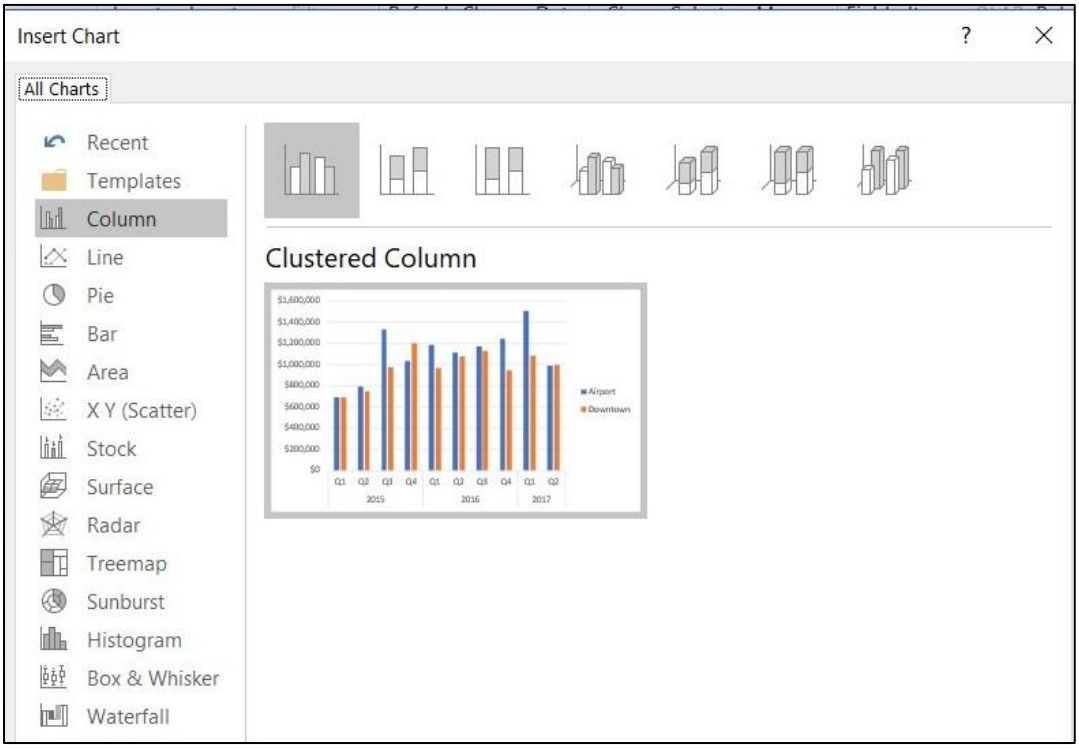
1. To create a Pivot Chart, with your Excel file open, click anywhere within the Pivot Table and you should see the PivotTable Tools near the top of the screen. Click on the Analyze tab.



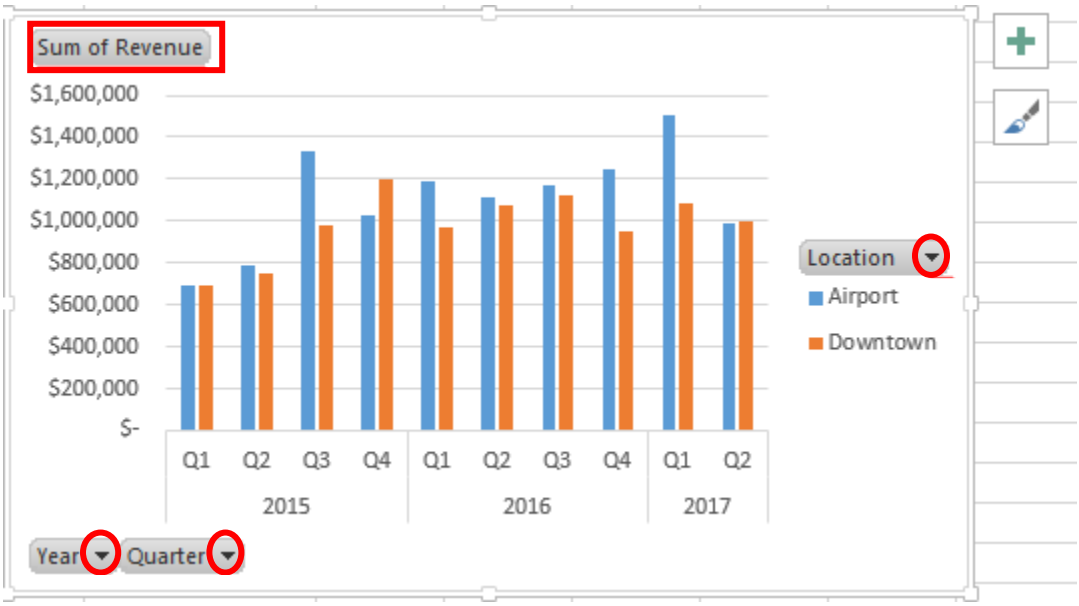
2. In the Tools group, click on PivotChart.



3. The Insert Chart dialog box will show you all charts available with a small preview.

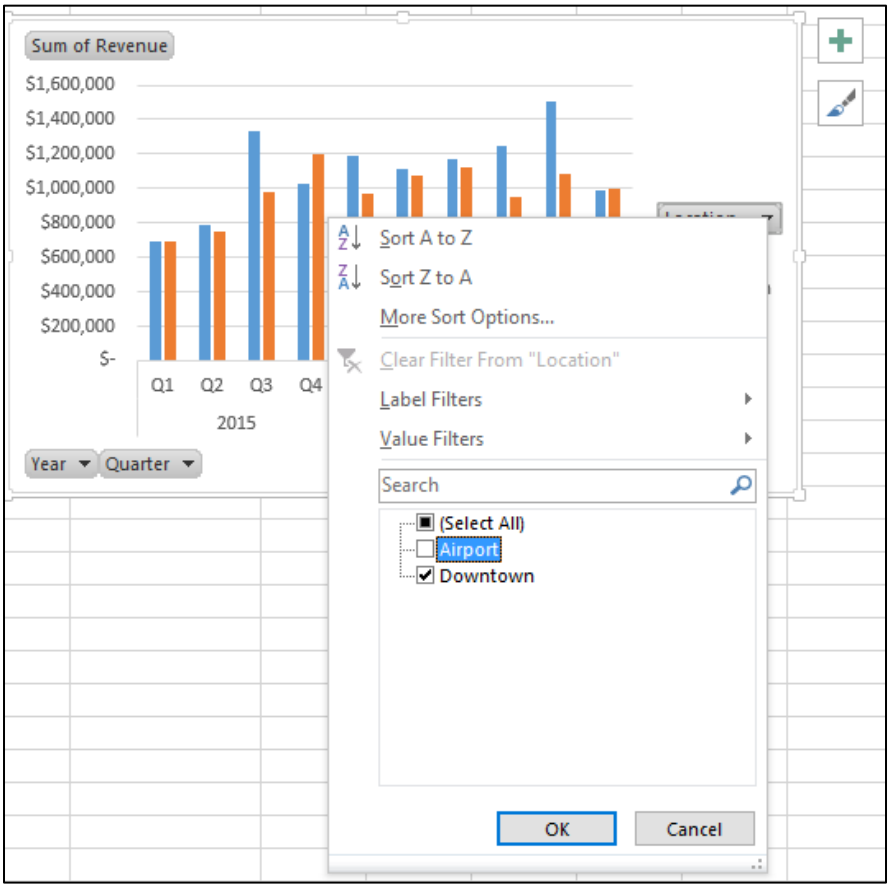


4. Depending on your data, some types of charts will simply not make much sense. For the purposes of this tutorial, the Clustered Column chart works fine. Choose Clustered Column and click OK.

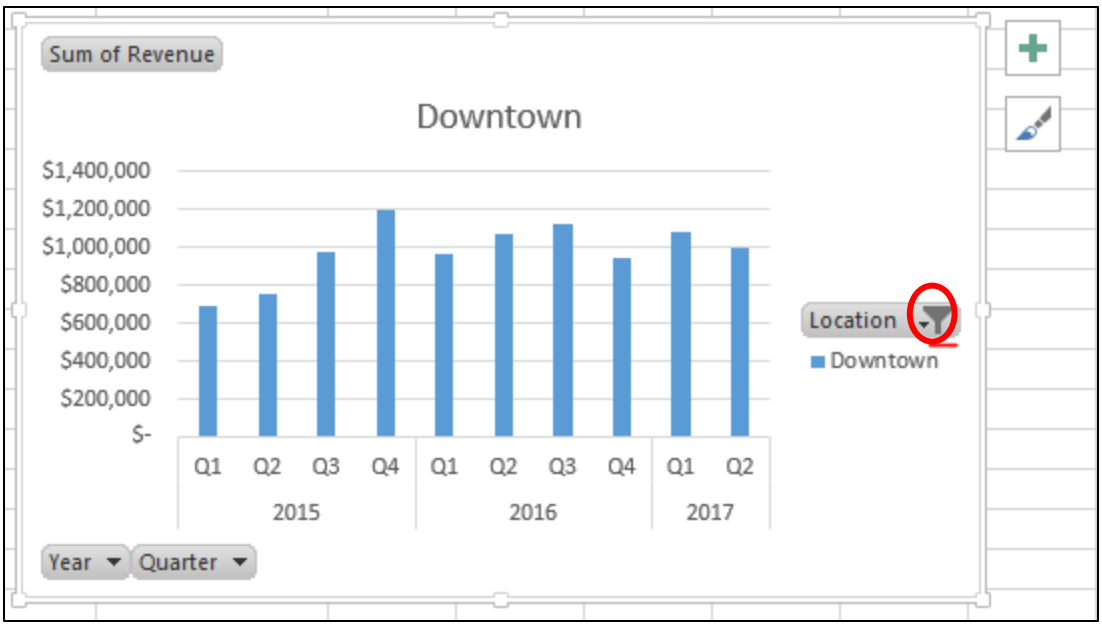


The PivotChart assigns a name ‘Sum of Revenue’ describing the data, and gives us options to further filter the data and modify the chart. By clicking the down arrow next to Location, Year or Quarter we can filter the data.

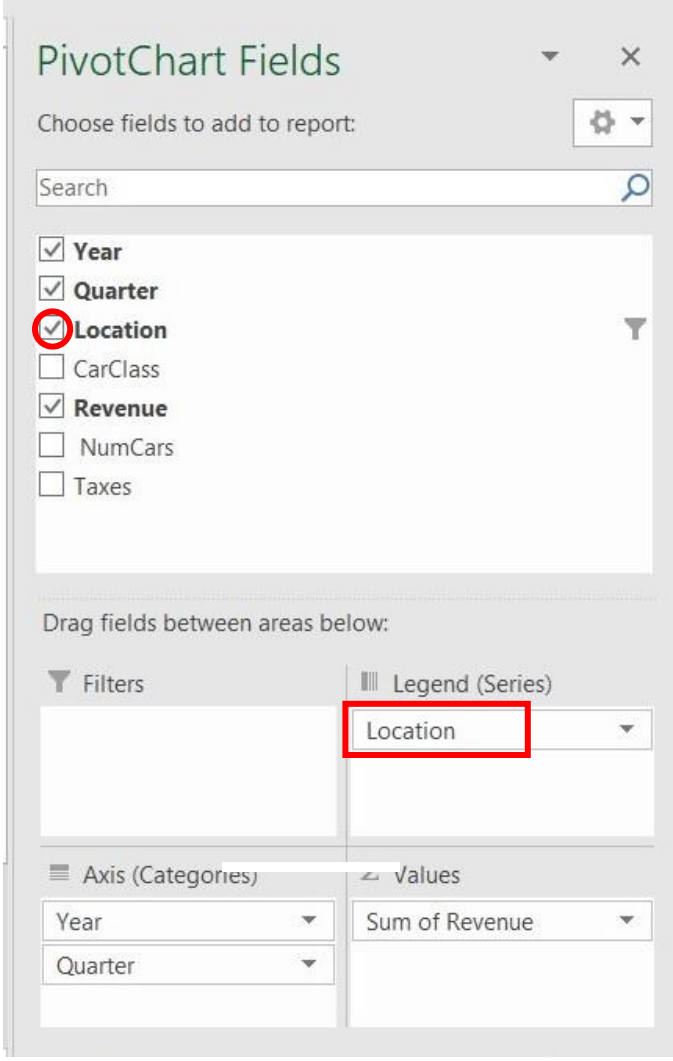
For example I can remove the ‘Airport’ data and see only the Downtown location in the chart, by deselecting Airport.



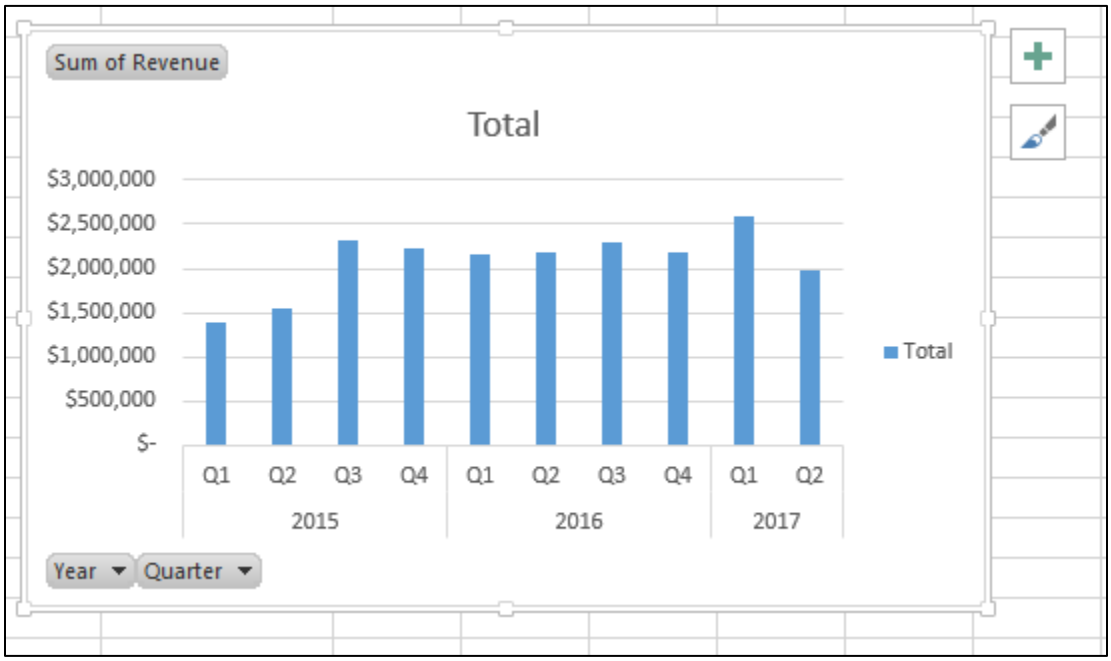
The result is below. The filter symbol next to Location shows that the data has been filtered.



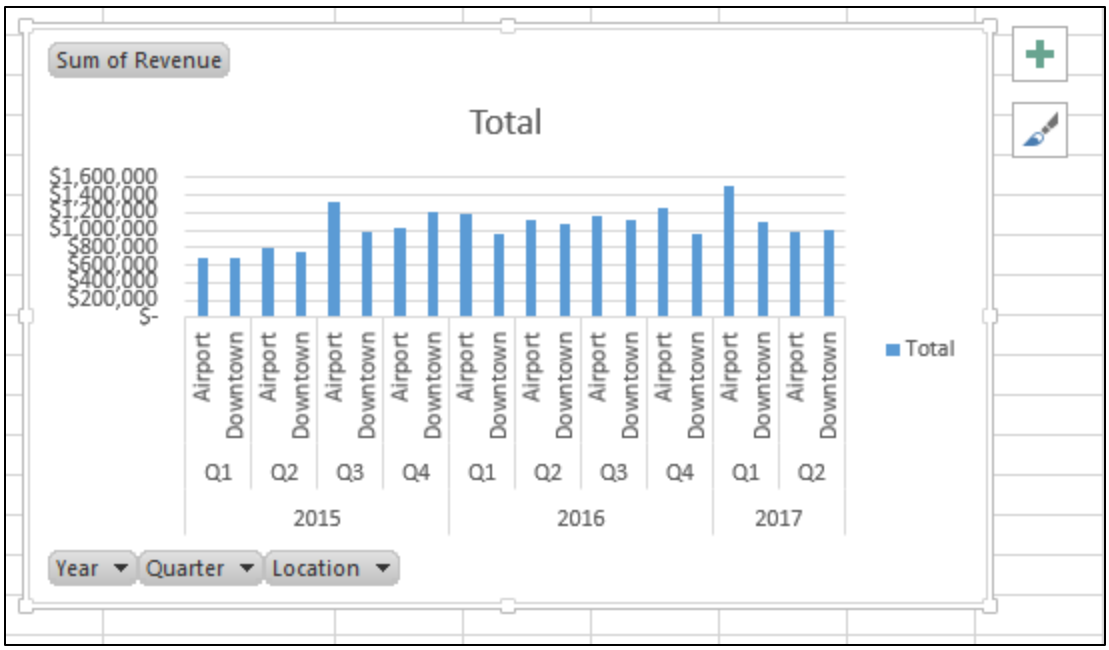
5. With the chart selected, at the right, you'll see a PivotChart Fields area. (To display the list you may have to deselect the chart – remove the border, then left-click in the blank space of the chart and select Show Field List.) Data can also be filtered here, in the top half of the PivotChart Fields area. We can also change how the data is presented, for example, by removing 'Location' completely by either deselecting the Location tickbox in the top half or selecting Location in the bottom half and dragging it up, out of the lower half of the PivotChart Fields area.



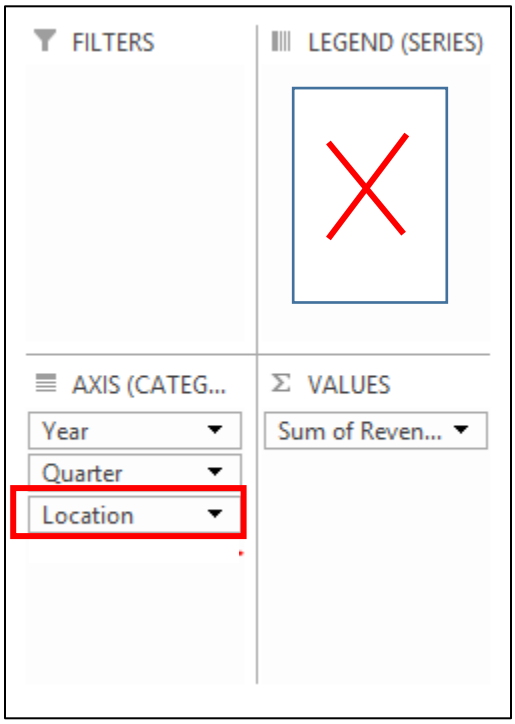
The chart without Location simply shows Total revenues by quarter.



Be aware that if I check Location again, the new PivotChart generated by Excel may not look like the one I had before. Compare the chart below to the chart in section 4 above.

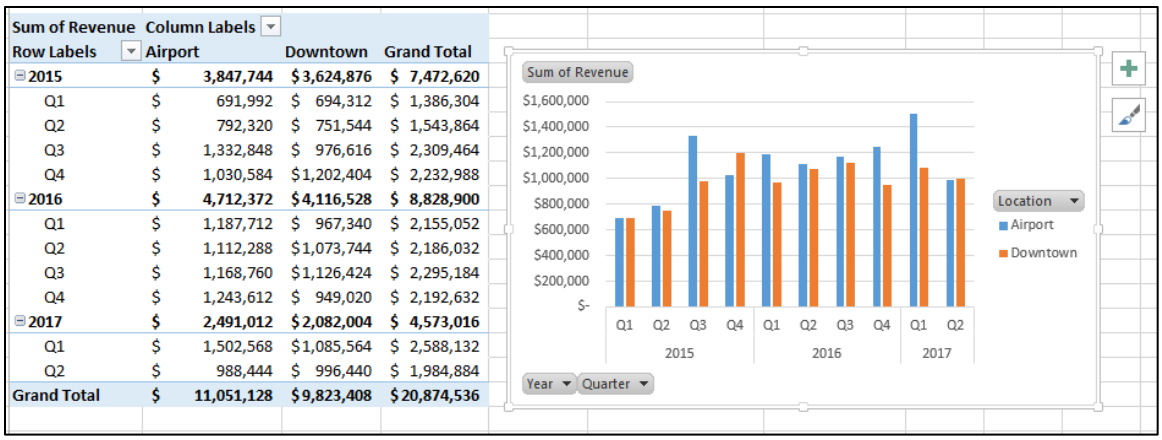


A look at the PivotChart Fields area, shows that Location is no longer under Legend, but under Axis.



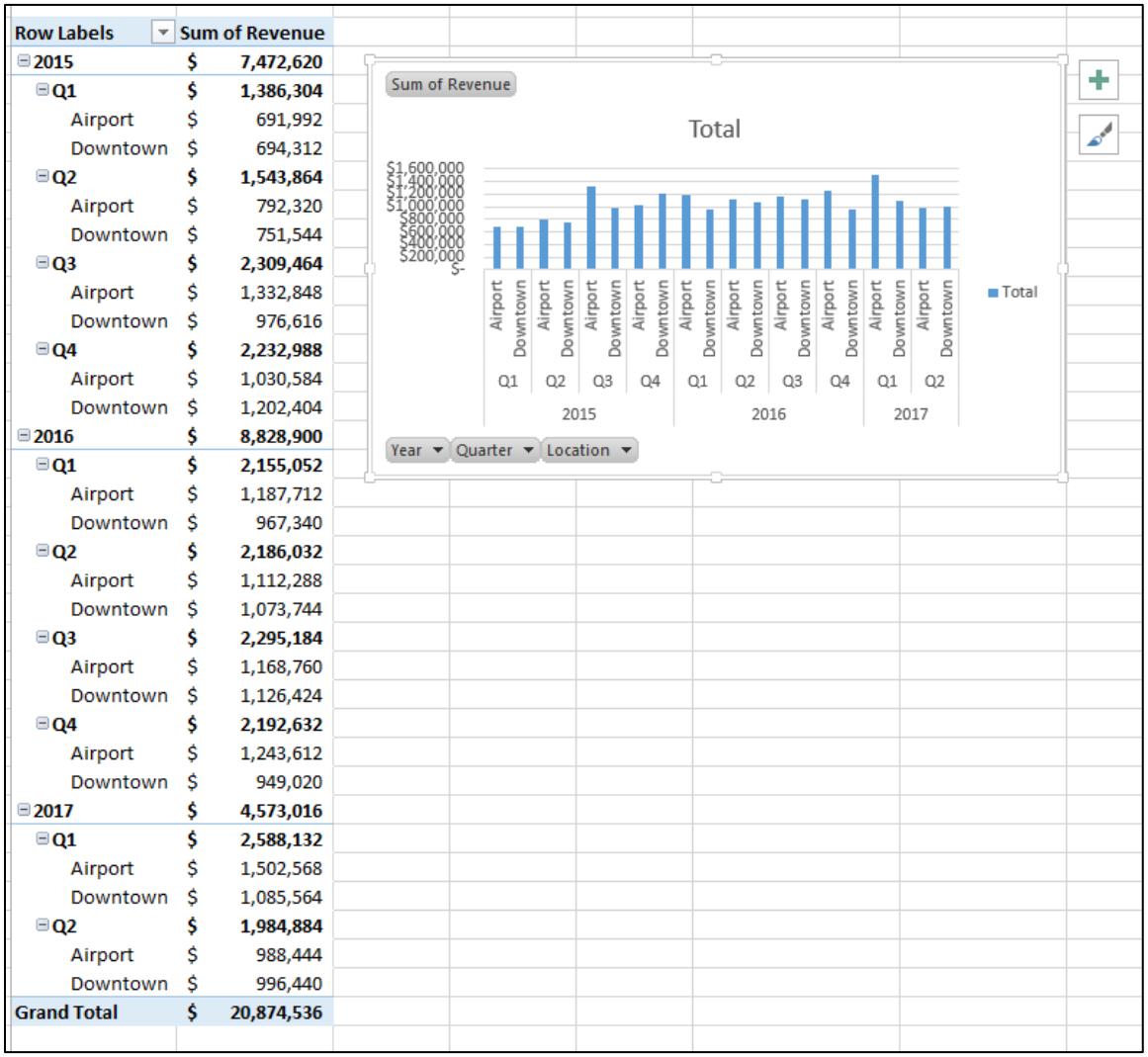
But I can drag and drop Location from Axis to Legend to restore the earlier version of the chart.

Note too that every time I change PivotChart Fields area, not only does the chart change, but the PivotTable itself changes. With Location under Legend:



Sum of Revenue	Column Labels		
Row Labels	Airport	Downtown	Grand Total
2015	$ 3,847,744	$ 3,624,876	$ 7,472,620
Q1	$ 691,992	$ 694,312	$ 1,386,304
Q2	$ 792,320	$ 751,544	$ 1,543,864
Q3	$ 1,332,848	$ 976,616	$ 2,309,464
Q4	$ 1,030,584	$ 1,202,404	$ 2,232,988
2016	$ 4,712,372	$ 4,116,528	$ 8,828,900
Q1	$ 1,187,712	$ 967,340	$ 2,155,052
Q2	$ 1,112,288	$ 1,073,744	$ 2,186,032
Q3	$ 1,168,760	$ 1,126,424	$ 2,295,184
Q4	$ 1,243,612	$ 949,020	$ 2,192,632
2017	$ 2,491,012	$ 2,082,004	$ 4,573,016
Q1	$ 1,502,568	$ 1,085,564	$ 2,588,132
Q2	$ 988,444	$ 996,440	$ 1,984,884
Grand Total	$ 11,051,128	$ 9,823,408	$ 20,874,536

With Location under Axis:



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