

Hands-on Lab 7: Using Pivot Tables

Estimated time needed: 30 minutes

create a Pivot Table and use fields to arrange data in a Pivot Table, and how to perform calculations using Pivot Table data. Next, you will learn some other features that we can use with Pivot Tables, including Recommended Charts, Filters, Slicers, and Timelines. Software Used in this Lab

The instruction videos in this course use the full Excel Desktop version as this has all the available product features, but for the hands-on labs we

will be using the free 'Excel for the web' version as this is available to everyone. Although you can use the Excel Desktop software if you have access to this version, it is recommended that you use Excel for the web for the

there are some small differences in the interface and available features. **Dataset Used in this Lab**

CC0: Public Domain license.

We are using a modified subset of that dataset for the lab, so to follow the lab instructions successfully please use the dataset provided with the

lab, rather than the dataset from the original source.

Objectives

• Perform calculations using Pivot Table data • Use the Recommended Charts feature (does not work with the

- 'Basic' Office for the web plan.)
- Use the Filters feature

and open it using Excel for the web. 2. Select cell A2. 3. On the **Home** tab, in the **Tables** group, click **Format as Table**.

4. Select Light Gray, Table Style Medium 15.

how to perform calculations using Pivot Table data.

create a Pivot Table and use fields to arrange data in a Pivot Table, and

arrange data in a pivot table

3. Click **OK**. × Create PivotTable

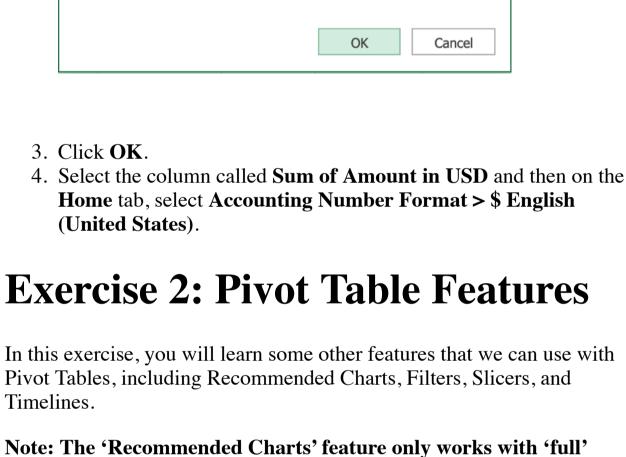
- OK Cancel
- 8. In the fields list, drag **Amount in USD** to **Values**. 9. In the ribbon, select the **PivotTable** tab, click **Settings**, then in the PivotTable Settings pane, under Layout, select Single column.
- Task C: Perform a simple calculation in a pivot table
 - 1. In the **PivotTable Fields** pane, in the **Values** section, click the drop-down arrow next to **Count of Amount in USD**, and click Value Field Settings.

×

Value Field Settings Source Name: Amount in USD Custom Name: Count of Amount in USD SUMMARIZE VALUE BY SHOW VALUE AS

2. Select Summarize value field by > Sum.

Count Average Max Min Product



1. Switch to worksheet **indian-startup-funding**. 2. Select column **F** (**City Location**).

Recommended Charts

Count of City Location

10

+ Insert PivotChart

Health and Wellness

Transportation

Digital Media

Education

ΑI Software

Consumer Goods

Consumer Technology

Advertising, Marketing

Nanotechnology

Customer Service

Healthcare

IoT

15

20

25

'Industry Vertical': E-Commerce appears most often.

Startup Name

YEARS *

YEARS

QUARTERS

MONTHS

DAYS

30

Is this helpful?

often.

City Location

'City Location': Bengaluru appears most

1?

subscription). Recommended Charts do not work with the 'basic'

Task A: Use of the Recommended Charts

plan that comes with a Microsoft Account.

4. Click + Insert PivotChart.

City Location

Gurgaon

Pune

Noida

Gurgaon

Bengaluru Noida

Gurgaon

Row Labels

E-Commerce **FinTech**

Health and Wellness

Food and Beverage

Finance

EdTech

SaaS

Technology

Transportation

Consumer Goods

Digital Media

Information Technology

Last Mile Transportation

Waste Management Service

Transport

SoftBank Vision Fund **Faridabad** Paytm, NPTK, Sabre Partners and Neoplux Bengaluru Bengaluru Vertex Growth Fund Mumbai Bengaluru Ruizheng Investment

Investors Name

SAIF Partners, Spring Canter Investment Li

Manipal Education and Medical Group (M

Sathguru Catalyzer Advisors

Ping An Global Voyager Fund

Vijay Shekhar Sharma

Count of Startup Name

8

5

5

5

3

3

3

3

2

2

2

2

2

2

Mumbai Angels, Ravikanth Reddy

3. On the **Insert** tab, select **Recommended Charts**.

Altimeter Capital, Sutter Hill Ventures San Jose, Delhi Amour Infrastructure

FinTech

- Automobile Services Education
- 2. In the Pivot Table, click the **Row Labels** arrow. 3. Select City Location, then Filter.... 4. Just select **Burnsville**, **Delhi**, **New York**, then click **OK** to display

5. In the Pivot Table, click the **Row Labels** arrow.

Task C: Use of the Slicers feature

the amounts for startups in these three cities only.

Location' to display the startups in all cities again.

6. Select City Location, then click Clear Filter From 'City

- 1. Download the file indian startup funding Lab7 with slicers timelines.xlsx. Upload and open it using Excel for the web. 2. Switch to worksheet **Pivot1** if you are not there.
- the **Investors Name** slicer, click the **Clear Filter** button. Task D: Use of the Timelines feature

1. In the Date timeline, click top right drop-down and select **DAYS**,

6. In the City Location slicer, click the Clear Filter button, then in

New York still selected, press **CTRL** and select **Burnsville**, and

Westbridge Capital, and then Breakthrough Energy Ventures.

select **Amour Infrastructure**, then press **CTRL** and select

- 2019 2020 2019 2020 2021
- 2. In the Date timeline, click **top right drop-down** and select

3. In the Date Timeline, select 2019 Q1, then drag 2019 Q1 to 2019

5. In the Date timeline, click **top right drop-down** and select

Congratulations! You have completed Lab 7, and you are

- Other Contributor(s) • Steve Ryan

4. In the Date timeline, click the **Clear Filter** icon.

YEARS, then select **2020** only.

Version 2020-09-10 1.2

Steve Ryan 2020-07-23 1.1 2020-07-20 1.0

ID review Sandip Saha Joy Initial version created

In this lab, first you will learn how to format data as a table, how to

generous enough to share the data publicly for free.

The dataset used in this lab comes from the following source: Acknowledgement and thanks also goes to https://trak.in who were

https://www.kaggle.com/sudalairajkumar/indian-startup-funding under a

<u>hands-on labs</u> as the lab instructions specifically refer to this version, and

After completing this lab, you will be able to:

 Format data as a table • Create a Pivot Table and use fields to arrange data in a Pivot Table

 Use the Slicers feature • Use the Timelines feature

Exercise 1: Introduction to Creating Pivot Tables in Excel In this exercise, you will learn how to format data as a table, how to

Task A: Format data as a table 1. Download the file **indian startup funding Lab7.xlsx**. Upload

- Task B: Create a pivot table and use fields to
 - 1. Select cell **D4** 2. On the **Insert** tab, click **PivotTable**.
- Choose the data that you want to analyze Select a table or range Table/Range: Table2 Choose where you want the PivotTable report to be placed New Worksheet **Existing Worksheet** Location:
- 4. Double-click **Sheet1**, type **Pivot1** and click **OK**. 5. In the fields list, drag **Industry Vertical** to **Rows**. 6. In the fields list, drag City Location to Rows below Industry Vertical. 7. In the fields list, drag **Startup Name** to **Rows** below **City** Location.
- Summarize value field by Choose the type of calculation that you want to use to summarize data from the selected field Sum
- Timelines. Office for the web plans (those plans that come with an Office 365
- feature (Optional: If you have a full Office for the web plan)
- 5. Switch to worksheet **indian-startup-funding** again. 6. Select column C, D, E. 7. On the **Insert** tab, select **Recommended Charts**. 8. Choose the recommended chart, and click + Insert PivotChart.
- Task B: Use of the Filters feature 1. Switch to worksheet **Pivot1**.
- 3. In the City Location slicer, select Burnsville, then Delhi, then 4. To filter by multiple selection in the **City Location** slicer, with 5. To filter using more than one slicer, in the **Investors Name** slicer,

New York.

then **Delhi**.

Date

then scroll left and right.

- ready for the next topic. Author(s) Sandip Saha Joy

QUARTERS.

Q3.

Steve Ryan

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Added software/dataset info

Changelog **Change Description Date** Changed by