Excel® Pivot Tables Step by Step Guide

LEARNEXCELNOW



www.learnexcelnow.com



Excel Pivot Tables Step by Step Guide

Table of Contents

RNEXCELNOW

CONQUER

THE FEAR OF EXCEL

Intro Set Up/Build a Pivot Table Manipulate the Date Report on the Data Page 3 Page 5 Page 7 Page 9

Let's start with a story....

THE FEAR

ack Smith found his perfect job. As the sales manager for a boutique marketing firm, he had everything he wanted: good salary, easy commute, and a company culture he could get behind.

This is part of the reason he was so stressed out after his first review. The Director of his department wasn't satisfied with his sales reports. She complained that that data was too unreadable and raw.

She said she expected the reports to be in a Pivot Table from now on. He didn't know how to create Pivot Tables.

The night after the review he felt frustrated with the job. His confidence waned and be began to dread going into the office the next day.

But with the fresh start of morning he became more optimistic about the job. Before falling asleep the night before, Zack decided was going to wake up and conquer Pivot Tables.

The next time he submitted his reports, he was going to show what he learned...

Nome Page Layout Permulas Data Review View Actobal Options Design	XI	3 9- (2-	-	1	Office Supply	Sales.:	xlsx - Microso	ft Excel		Sec. 1	PivotTal	ble Tool	s	1000	-	-		-			Statement of the local division in the local		
Protechale table Protechale table table Protechale table Protechale table table Protechale table Protechale table table table table Protechale table Protechale table table table table table table table Protechale table Protechale table t	F	ile Home	Invert	Page Layou	t Formula	s	Data Revi	iew View		Acrobat	Options	Desi	gn									~	() - # XX
Norm Norm <th< td=""><td>Pivo</td><td>tTable Table</td><td></td><td></td><td></td><td>]</td><td></td><td>X 🌑</td><td>Bar</td><td></td><td>👬 🕻</td><td></td><td></td><td></td><td>Slicer</td><td>Q.</td><td>A</td><td>Header Word</td><td>Art Signatu</td><td></td><td>π</td><td>Ω</td><td></td></th<>	Pivo	tTable Table]		X 🌑	Bar		👬 🕻				Slicer	Q.	A	Header Word	Art Signatu		π	Ω	
Tables Illustrations Charts File Links File <td>1100</td> <td>*</td> <td>A</td> <td>art •</td> <td>androvic Sereer</td> <td>isitot</td> <td>* *</td> <td></td> <td>Y</td> <td>*</td> <td>* Chart</td> <td>ts *</td> <td>ine con</td> <td></td> <td>Sheer</td> <td>Hyperink</td> <td>Box</td> <td>& Footer</td> <td>Line *</td> <td>ic obj</td> <td>-</td> <td>Symbol</td> <td></td>	1100	*	A	art •	androvic Sereer	isitot	* *		Y	*	* Chart	ts *	ine con		Sheer	Hyperink	Box	& Footer	Line *	ic obj	-	Symbol	
B8 · · · · · · · · · · · · · · · · · · ·		Tables		Illustratio	ons			Ch	arts			Fa .	Spar	klines	Filter	Links		Tex	đ		Symb	ools	
A B C D E F G H I J K L M PoorTable Field List: ▼ × 2 Region East T -		B8 • (500 · · · · · · · · · · · · · · · · · ·																					
1 Sales (AII) • · <t< td=""><td></td><td>А</td><td></td><td>В</td><td>С</td><td></td><td>D</td><td>E</td><td></td><td>F</td><td>G</td><td></td><td>н</td><td>1</td><td></td><td>J</td><td>K</td><td>L</td><td>M</td><td>Pivot</td><td>Table Field List</td><td></td><td>▼ X</td></t<>		А		В	С		D	E		F	G		н	1		J	K	L	M	Pivot	Table Field List		▼ X
2 Region East T Concome fields to add to report:	1	Sales	(AII)		-															1			
3 Image: market m	2	Region	East		Τ.,															Choo	ose fields to add	to report:	
4 Sum of Sales Column Labels Paper Clips Pane Paper Sales Grand Total Column Labels Paper Sales Grand Total Column Labels Paper Sales Grand Total Column Labels Paper Sales Grand Total Sales Client Paper Sales Column Labels Paper Sales	3																			F	irst		
5 Row Labels Paper Clips Pens Printer Paper Staples Grand Total 6 ABC Company \$200.00 \$1,000.00 \$2,000.00 \$1,000.00 \$2,000.00 \$1,000.00 \$2,000.00 \$1,000.00 \$2,000.00	4	Sum of Sales	Colu	umn Labels	-																ast		
6 ABC Company \$200.00 \$1,000.00 \$1,200.00 \$0000 \$1,000.00 \$1,200.00 \$0000 \$1,000.00 \$1,0	5	Row Labels	Pape	er Clips	Pens	Pr	inter Paper	Staples	Gr	and Tota	I										tegion		Y
7 Coleman Ins. \$ 100.00 \$ 750.00 \$ 850.00 8 Michales & Smith \$ 500.00 \$ 500.00 9 Rogers Inc. \$ 500.00 \$ 500.00 10 YYZ Company \$ 100.00 \$ 750.00 \$ 850.00 11 Grand Total \$ 1,000.00 \$ 1,500.00 \$ 1,500.00 \$ 3,900.00 12	6	ABC Company			\$200.00			\$1,000.00	\$	1,200.0	0										order Date		
8 Michales & Smith \$ 500.00 \$ 500.00 \$ 500.00 Rate 9 Rogers Inc. \$ 500.00 \$ 500.00 Rate Rate 11 Grand Total \$ 1,000.00 \$ 1,500.00 \$ 3,900.00 S 3,900.00 S 3,900.00 12 -	7	Coleman Ins.			\$100.00	\$	750.00		\$	850.0	0										roduct		
9 Rogers Inc. \$ 500.00 \$ \$500.00 \$ \$	8	Michales & Sn	nith \$	500.0	00				\$	500.0	0										lient		
10 XYZ company \$ 100.00 \$ 750.00 \$ 850.00 11 Grand Total \$ 1,000.00 \$ 400.00 \$ 1,500.00 \$ 1,500.00 \$ 3,900.00 12 13 14 14 14 14 14 14 14 15 16 17 16 17 16 17 17 16 17 18 18 18 18 18 19 10	9	Rogers Inc.	\$	500.0	00				\$	500.0	0										ate		
11 Grand Total \$ 1,000.00 \$ 1,000.00 \$ 3,900.00 1,000.00 \$ 3,900.00 ■ □ <td>10</td> <td>XYZ Company</td> <td></td> <td></td> <td>\$100.00</td> <td>\$</td> <td>750.00</td> <td></td> <td>\$</td> <td>850.0</td> <td>0</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>ales</td> <td></td> <td></td>	10	XYZ Company			\$100.00	\$	750.00		\$	850.0	0										ales		
12 13 14 15 16 17 16 17 18 17 18 17 18 17 18 16 17 18 17 18 17 19 16 17 10	11	Grand Total	\$	1,000.0	00 \$400.00	\$	1,500.00	\$1,000.00	\$	3,900.0	0										ommission		
13 14 15 15 15 15 15 15 16 14	12																						
14 15 16 17 16 17 16 17 17 16 17 16 17 16 17 16 17 16 17 16 17 17 17 17 17 17 17 17 17 17 17 16 17 17 16 17 16 17 16 17 17 16 17 17 17 17 17 17 17 16 17 16 17 16 17 16 17 16 17 16	13																		=	Ξ.			
15 Orag fields between areas below: 16 Orag fields between areas below: 17 Orag fields between areas below: 18 Orag fields between areas below: 19 Orag fields between areas below: 20 Orag fields between areas below: 21 Orag fields between areas below: 22 Orag fields between areas below: 23 Orag fields between areas below: 24 Orag fields between areas below: 25 Orag fields between areas below: 26 Orag fields between areas below: 10 Orag fields between areas below: 11 Orag fields between areas below: 12 Orag fields between areas below: 13 Orag fields between areas below: 14 Orag fields between areas below: 15 Orag fields between areas below: 16 Orag fields between areas below: 17 Orag f	14																						
16	15																			Drac	fields between	areas belo	
17 Image: Constraint of the constra	16																			Y	Report Filter	C C	olumn Labels
18 Region	17																			Sal	es 🔻	Prod	uct 🔻
19	18																			Re	gion 🔻		
20 21 Control Row Labels Σ Values 22 Control Sum of Sales Sum of Sales 23 Control Control Sum of Sales 24 Control Control Sum of Sales 26 Control Control Control 26 Control Control Control 26 Control Control Control 27 Control Control Control	19																						
21 Image: Content of the content of	20																						
22 Clent ▼ Sum of Sales ▼ 23 Clent ▼ Sum of Sales ▼ 24 Clent ▼ Sum of Sales ▼ 25 Clent ▼ Clent ▼ 26 Clent ▼ Clent ▼ 27 Clent ▼ Clent ▼ 28 Clent ▼ Clent ▼ 29 Clent ▼ Clent ▼ 20 Clent ▼ Clent ▼ 26 Clent ▼ Clent ▼ 27 Clent ▼ Clent ▼	21																				Row Labels	Σ	alues
23 24 25 26 14 + M Sheet7 / 4th Ortr Sales / Sales by Product / Sheet2 / Sheet3 / Sales by Product / Sheet2 / Sheet3 / Sales by Product / Sheet2 / Sheet3 / Sales by Product / Sheet3 / Sales by Product / Sheet2 / Sheet3 / Sales by Product / Sales by Product / Sheet3 / Sales by Product / Sheet3 / Sales by Product / Sales by Product / Sheet3 / Sales by Product / Sales by Product / Sheet3 / Sales by Product /	22																			Clie	ent 🔻	Sum	of Sales 🔻
24 25 26 Image: Constraint of the state of the sta	23																						
25 26	24																						
26 Defer Layout Update Update Update	25																						
A A H Sheet7 / 4th Ortr Sales / Sales by Product / Sheet2 / Sheet3 / 2	26						/ /	1.2	1,-												Defer Layout Up	date	Update
	14 4	Sheet7	4th Qr	tr Sales / S	ales by Produ	ct /	Sheet2 Sheet2	neet3 🤇 🙄				•					_		► U			0	-

EXCEL

THE FEAR OF

CONQUER

Pivot Tables are used to summarize data in a visual way, so people know what is going on with their numbers. It's a good way to organize large lists of data, so you can understand the data better and produces reports about it. They save you time and energy and ensure accuracy with automatic calculations. Follow these steps as it takes you from beginning to end of the Pivot Table process.

Set Up/Build a Pivot Table

First you will need to organize your data: you can't have any blank rows or columns, the columns and rows need to be labeled with unique names, and automatic subtotals and filters need to be removed. Once your data is organized, you can create your Pivot Table. As you enter data in Excel, the data appears in the cell and in the formula bar at the top of the worksheet.

To do this:

THE FEAR OF

- Highlight the data that you want included, then Type and enter to move down, cell to cell, across rows.
- Go to the "Insert" tab and in the "Tables Command Group" click on "Pivot Table."
- A dialogue box will appear and you can verify that you selected the appropriate data.
- You will be moved to the new sheet tab where the Pivot Table will be on the left and the "Field List" will be on the right.
- If the field is a text or date field, it's usually placed in the Row Labels or Column Labels areas.
- If the field is numeric data, it's usually place in the Values area.
- The Column Labels will display as a column across the page and the Row Labels will display as rows down the page.
- The Report Filter acts as a filter for the whole Pivot Table and is displayed in the top two left columns.
- The Report Filter acts as a filter for the whole Pivot Table and is displayed in the top two left columns.
- The Values will be calculated automatically as a summation for numeric values, but for text values, it will automatically be summarized with a count calculation.



- To view your data in different ways, move the fields among the 4 areas in the "Field List" and the table will change automatically.
- You do not have to have a field in each area.
- Also, changing the data source doesn't automatically update the Pivot Table. To refresh the Pivot Table use Alt + F5 (refreshes a single Pivot Table) or Alt + Ctrl +F5 (refreshes all Pivot Tables in a workbook).

WOLTADIC FICIA LISC		
Change fields to add to r	eport	•
	eport	
First		
Region		
V Region		Y
Product		
Prod. Status		
Client		
Rate		
▼ Sales		
Commission		
Drag fields between area	as below:	shele
Drag fields between area	as below:	.abels
Drag fields between area T Report Filter Sales Region T	as below: Column I Product	.abels
Drag fields between area Prag fields between area Report Filter Sales Region Region Row Labels	as below: Column L Product Σ Values	abels
Drag fields between area Prag fields between area Report Filter Sales Region Region Row Labels Client	as below: Column L Product Σ Values	.abels
Drag fields between area Prag fields between area Report Filter Sales Region Region Row Labels Client	as below: Column L Product Σ Values Sum of Sales	abels •

Manipulate the Date

THE FEAR OF

With Pivot Tables, readability is key, so you want to make your data look good. Once you have the Pivot Table structure in place, you can manipulate the data by formatting, sorting, and filtering it. If you want to show less data in the Pivot Table, you can drag a field out of the area section or uncheck it. You can add or remove them as you want.

To format your Pivot Table, right-click on any number and select "Format Cells" and then select the "Number" tab on the left. From there you can set the commas or decimals to make the Pivot Table easier to read. The format you choose will be applied to all the numbers on the Pivot Table.

Sorting data in the Pivot Table can make it easier to understand. Go to the "Options" tab, then click on the "Sort" button. For numeric values, you can sort from largest to smallest or smallest to largest; for text values you can sort alphabetically; and for dates you can sort from oldest to newest or newest to oldest. But, make sure to always double check sorted data to ensure that the information is moving with its source. When you use the filter, you can view specific data. By narrowing down the visible data, it's easier for the reader to focus on the important data that you want them to focus on. To use a filter on a row or column, click on the drop-down arrow next to the Row or Column Labels cell, from there you'll be able to uncheck the boxes of the data that you don't want shown on the Pivot Table. To use the value filter, click on the drop-down arrow next to the Value cell, go down to "Value Filters" and you'll be able to filter by greater/less than a certain value, top 10, equal, etc.

THE FEAR OF

אן איז האין אין אין אין אין אין אין אין אין אין	ice Supply Sales.xlsx - Microsoft Ex	cel		PivotTable Tools		CONTRACTOR OF STREET, ST. OF ST.	No. of Concession, name			
File Home Insert Page Layout	Formulas Data Review	View	Acrobat	Options Desig	gn			a 🕜 🗖 🖾		
PivotTable Tables	tArt Screenshot	Pie E Cha	Bar Area Sca rts	tter Other Charts	ne Column Win/Loss	Slicer Hyperlink Filter Links	Text Header WordArt Signatur Box & Footer * Line * Text	e Object Symbol		
A5 ▼ (* <i>f</i> * Rc	ow Labels							~		
A B 1 Sales (All) 2 Region East 3	C D	E	F	G	H I	1	K L M	PivotTable Field List		
4 Sum of Sales Column Labels ▼ 5 Row Labels ▼ Paper Clips 2↓ Sort A to Z	Pens Printer Paper St \$200.00 \$	taples 1,000.00	Grand Total \$ 1,200.00					Cast Region T Order Date		
X↓ Sort Z to A More Sort Options Clear Filter From "Client"	\$100.00 \$ 750.00		\$ 850.00 \$ 500.00 \$ 500.00					Product Frod. Status Client Rate		
Label Filters →	K Clear Filter	0.00	\$ 3.900.00					Commission		
Value Filters	<u>E</u> quals Does <u>N</u> ot Equal									
Select All) Select All) Select All) Select All All Company Seleman Ins. Harris Automotive Michales & Smith Segres Inc.	Begins W <u>i</u> th Does No <u>t</u> Begin With Ends Wi <u>t</u> h Does Not End Wit <u>h</u>							Drag fields between areas below:		
XYZ Company	Cont <u>a</u> ins <u>D</u> oes Not Contain									
	<u>G</u> reater Than Greater Than Or Equal To							Row Labels Σ Values Client Sum of Sales		
OK Cancel	Less Than									
25 26 II ↓ ▶ ▶ Sheet7 ∠ 4th Qrtr Sales ∕ Sales	Less Than Or Egual To Between Not <u>B</u> etween		/] 4			▼ ↓	Defer Layout Update Update		

Report on the Data

When reporting data, there are a few options you can choose from including drill down, automatic reports, duplicating Pivot Tables, and Pivot Table web. Sometimes, it might be helpful to drill down into the Pivot Table to show the numbers that make up the summary numbers. To do this, double click on the value that you want to drill down on. Excel will put a duplicate of the source data that was used to create that value on a new worksheet. Another way to do this is to right click on the value and select "Show Details." If you want to see the details behind the whole Pivot Table, double-click on the "Grand Total" and the data source will be duplicated on a new worksheet.

With automatic reports, a formatted Pivot Table is created on a separate sheet tab for each category of data in the Report Filter area. To do this, click on the "Options" tab, then in the Pivot Table Command Group, click on the "Options" drop-down arrow, and click on "Show Report Filter Pages." This will create multiple reports automatically.

For reporting, duplicate Pivot Tables can be used to display the data in a combination of different ways. When you copy and paste a Pivot Table, the duplicate holds a copy of the source data, so it can be used to create different views of the data. There are several ways to do this, first highlight the Pivot Table, then right-click and select "Copy" or type "Ctrl" + "C" and the data will be copied. To paste, go to a new worksheet, click on a cell, then right-click and select "Paste" or "Ctrl + "P." To produce a static copy of the Pivot Table (one that doesn't hold the source data), when pasting, rightclick and select "Paste Special" and choose "Values Only."

To share your Pivot Table as a web page, go to "File," then select "Save As." In the dialog box, under "Save as type" select "Web Page" and click "Publish."



Another way to customize your report is with report layouts. To do this, go to the "Design" tab and from the "Layout Command Group" select "Report Layout." From the drop-down menu, you can choose from the following options: Compact Form (reduces space), Outline Form (indents), and Tabular Form (spreadsheet-like).



We here at Learn Excel Now hope you found this Pivot Table step-by-step guide useful.

If you would like additional information on Excel, please visit us at: LEARNEXCELNOW.COM



Looking for more training for new users?

Click here to check out our Excel Foundations program

> Have questions or want more information? Please email us at: QUESTIONS@LEARNEXCELNOW.COM