



Pivot Tables in Microsoft Excel 2007

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Objectives

- To create pivot tables
- To filter data in pivot tables
- To format data in pivot tables
- To improve appearance of pivot tables
- To create pivot charts

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Pivot Tables

- PivotTable reports can help to analyze numerical data
- With PivotTable reports, you can look at the same information in different ways with just a few mouse clicks.
- Data swings into place, answering questions, telling you what the data means.

How to Create a Pivot Table

1. Open your spreadsheet and remove any blank rows or columns.
2. Make sure each column has a heading, as it will be carried over to the Field List.
3. Make sure your cells are properly formatted for their data type.
4. Highlight your data range (at A1 shift+Ctrl+End)
5. Click the **Insert tab**.
6. Select the **PivotTable button from the Tables group**.
7. Select **PivotTable from the list**.

How to Create a Pivot Table cont...

8. Double-check your **Table/Range: value**.
9. Select the radio button for **New Worksheet**.
10. Click **OK**.

A new worksheet opens with a blank pivot table. You'll see that the fields from our source spreadsheet were carried over to the **PivotTable Field List**.

11. Drag an item such as Month from the **PivotTable Field List** down to the **Row Labels** quadrant.

The left side of your Excel spreadsheet should show a row for each Month value.

12. The next step is to ask what you would like to know about each month. Drag the salesman field from the **PivotTable Field List** to the **Column Labels** quadrant.

This will provide an additional column for each salesman. Note that you won't see any numerical data.

How to Create a Pivot Table cont...

- To see the total sales for each salesman drag the Net Sales field to the **Values quadrant**.
- In this case, Excel determines I want a Sum of Net Sales.
- Double-click the entry and choose another Field Setting e.g. Average.
- Move the fields to the Row labels and Column labels quadrants to view different views of the report

How to Filter Data in Pivot Tables

- Move the field you want to filter by to the **Report Filter**. e.g. Country
- The filter is placed above the table. Click on the dropdown arrow to filter the table.
- Click the **Select Multiple Items** check box.
- Select the country/countries to view results

How to Create a Group Summary

- Double Click on the data in the pivot table.
- E.g. double click on sum of Net Sales for Jane for the year 2009
- This creates a new worksheet with the details.

How to Format Data in Pivot Tables

- Highlight the data to format
- Right click
- Select format cells or use the quick format buttons e.g. (,) for thousand separator, font color and size
- To sort the data : Highlight the data
 - Click on options tab->Sort group
 - Select the A->Z or Z->A quick sort
 - For Advanced sorting Click on AZ ZA sort button

How to Improve Appearance of Pivot Tables

- To change the titles Column labels and Row labels
 - Click inside the table
 - Select Design tab->Layout group->Report Layout->Show in outline form
- To show/hide subtotals
 - Click inside the table
 - Select Design tab->Layout group>Subtotals> Do not Show sub totals (or select show all subtotals at top or bottom of group)
- To change the style of the table
 - Click inside the table
 - Select Design tab->PivotTable Styles group->Select the style

How To Create Pivot Charts

- Click on the data in the pivot table
 - Select the Options tab->Tools group-> Pivot Chart
- You can filter the chart as required.
 - Note: This filters the pivot table too
- To refresh data on the pivot table and chart
 - Click on the pivot table
 - Select the Options tab->Data group->Refresh

How to Get Microsoft Excel

- It is part of the Microsoft Office Suite
- It has to be purchased

Getting help

- Search online
 - www.google.com
 - Type Pivot Table Tutorial –gives helpful links or any question you may
- There is a help button at the top right corner of the Microsoft excel window
 - Click on it
 - Type in the question