

Introduction to Pivot Tables

FEEL FREE TO FORWARD THIS TO AS MANY PEOPLE AS YOU LIKE.

WHAT WOULD I USE IT FOR?

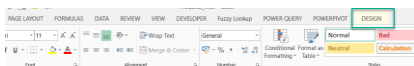
- TO SUMMARIZE LARGE DATA SETS
- TO "MINIATURIZE" YOUR DATA
- TO LOOK FOR GROUPINGS ACROSS MONTHS/DEPARTMENTS/PRODUCTS ETC

FIRST STEP – PREPARE YOUR DATA

- **NO BLANK ROWS OR COLUMNS**
- CHECK OUT MY DATA VALIDATION SHEET FOR GUIDELINES ON HOW TO FILL IN BLANK CELLS.
- **DATES PROPERLY ENTERED: ALL DATE COLUMNS SHOULD HAVE CORRECTLY FORMATTED ENTRIES I.E. NO BLANK CELLS AND NO 30TH FEBRUARY TYPE ENTRIES.**
- **CONSISTENT DATA ENTRY - IF YOU HAVE A COLUMN FOR PHONE NUMBERS THAT'S ALL YOU SHOULD HAVE IN IT.**

SECOND STEP – CONVERT TO A TABLE

- WHY? THIS MAKES THE DATA MUCH EASIER TO MANAGE AND UPDATE
- CLICK IN LIST, **INSERT | TABLE** AND THEN CLICK **OK**.
- OR CLICK IN THE LIST, CTRL AND T AND OK.
- YOU WILL NOW SEE A NEW RIBBON ON RIGHT HAND SIDE CALLED **DESIGN**



THIRD STEP: ROUGHLY PLAN OUT YOUR PIVOT TABLE.

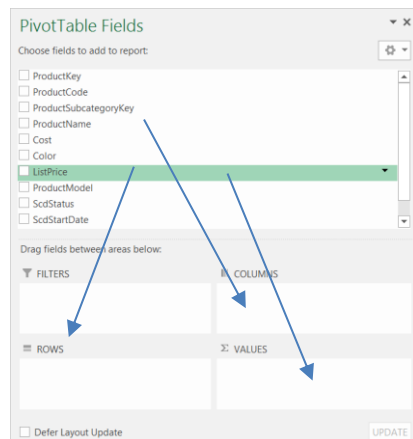
- YOU CAN CHECK OUT THIS LINK HERE FOR GUIDELINES ON PIVOT TABLE CREATION <http://bit.ly/2qlfvyt>
- THE FIELD(S) YOU WANT TO SUMMARIZE GOES IN YOUR **VALUES** SECTION.
- THE FIELD(S) YOU WANT AS **HORIZONTAL** HEADINGS GOES INTO YOUR **COLUMNS** SECTION
- THE FIELD(S) YOU WANT AS YOUR **VERTICAL** HEADINGS (ON LEFT) GOES INTO YOUR **ROWS**
- THE FIELD(S) YOU WANT TO FILTER BY GOES INTO YOUR **FILTERS** (REPORT FILTERS IN EXCEL 2010 AND EARLIER)

FOURTH STEP: CREATING IT

- CLICK IN YOUR DATA SOURCE.
- CLICK ON **DESIGN | SUMMARIZE WITH PIVOT TABLE**



- GO WITH THE DEFAULTS I.E. YOUR PIVOT TABLE WILL BE ON A NEW SHEET
- YOU WILL SEE THE **PIVOT TABLE FIELDS**



- DRAG YOUR DESIRED HEADINGS FROM THE TOP HALF OF THE GRID DOWN INTO THE QUADRANT BELOW.
- NOTICE HOW YOUR PIVOT TABLE IS STARTING TO TAKE SHAPE

FIFTH STEP: NUMBER FORMATTING

- YOU WILL NOTICE THAT YOUR NUMBERS WILL PROBABLY NOT BE IN YOUR DESIRED FORMAT E.G. CURRENCY
- RIGHT CLICK ON THE NUMBERS IN THE **VALUES** PART OF THE PIVOT TABLE
- CHOOSE **VALUE FIELD SETTINGS**
- CLICK ON **NUMBER FORMAT** ON BOTTOM RIGHT
- CHOOSE THE DESIRED NUMBER FORMAT FROM THERE.
- CLICK **OK** TWICE

I SUGGEST YOU DO IT THIS WAY BECAUSE ALL YOUR NUMBERS IN THIS VALUES FIELD NOW GET FORMATTED AND YOU DON'T HAVE TO WORRY THAT YOU HAVE LEFT SOME OF THEM OUT

SIXTH STEP: REFRESHING YOUR TABLE

- WHEN YOU ADD NEW DATA TO YOUR DATA SOURCE, THIS IS NOT AUTOMATICALLY REFLECTED IN YOUR PIVOT TABLE.

- IF YOU HAVE ADDED NEW COLUMNS/ROWS TO YOUR DATA AND YOU WANT TO SHOW THAT IN YOUR PIVOT TABLE, RIGHT CLICK IN THE PIVOT TABLE AND THEN **REFRESH**.
- YOUR NEW ENTRIES WILL BE REFLECTED IN YOUR PIVOT TABLES.
- NOTE THAT SOMETIMES THIS DOESN'T WORK SO YOU MAY NEED TO REFRESH AGAIN OR EVEN RECREATE THE PIVOT TABLE.

WORKING WITH DATES

- IF YOU WANT YOUR DATA TO BE GROUPED AUTOMATICALLY BY MONTH/QUARTER/YEAR, USE THE **GROUP** OPTION
- MAKE SURE YOU HAVE ADDED A DATE ENTRY TO YOUR PIVOT TABLE. IT SEEMS TO WORK BEST WHEN YOU ADD THIS DATE ENTRY TO THE **ROWS** PART OF YOUR PIVOT TABLE.
- DO A RIGHT CLICK ON THE DATE ENTRY IN THE PIVOT TABLE
- CHOOSE **GROUP**
- THEN CHOOSE THE GROUPING YOU WANT TO USE FROM THE LIST E.G. MONTH, YEAR, QUARTER
- YOU CAN USE MORE THAN ONE
- THIS WILL THEN GROUP YOUR DATA BY THAT FORMAT.
- NOTE THAT THE "QUARTERS" REFER TO THE STANDARD QUARTERS (JANUARY-MARCH FOR QUARTER 1 ETC) . IF YOUR QUARTERS ARE NON-STANDARD YOU WILL NEED TO ADD AN EXTRA COLUMN IN YOUR DATA TO SHOW THIS.
- ALSO NOTE THAT IF YOUR DATA SPANS MORE THAN ONE YEAR YOU WILL NEED TO INCLUDE YEARS IN THE GROUPING OTHERWISE EXCEL PUTS ALL YOUR MONTHS TOGETHER.
- IF YOU GET A MESSAGE THAT SAYS "**CANNOT GROUP BY THAT SELECTION**" CHECK THAT YOU HAVE NO BLANK CELLS IN THE DATE FORMAT AND THAT THEY ARE ALL FORMATTED CORRECTLY. REFRESH YOUR PIVOT TABLE. SOMETIMES YOU MAY NEED TO RE-CREATE THE PIVOT TABLE.
- YOU CAN ALSO GROUP BY OTHER ENTRIES E.G. IF YOU WANTED TO GROUP BY SALES QUANTITIES, ADD THE SALES FIELD TO VALUES AND ALSO TO ROWS.

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YOU CAN THEN GROUP THE ROWS ENTRY BY A RANGE OF AMOUNTS.

SUM OTHER THINGS

- WHEN YOU ADD A NUMBER ENTRY TO THE **VALUES** PART OF YOUR PIVOT TABLE, EXCEL USUALLY DEFAULTS TO SUM.
- HOWEVER SUM-TIMES (HA!) THAT WILL APPEAR AS COUNT. COUNT WILL APPEAR IF YOU DRAG A TEXT BASED ENTRY INTO YOUR **VALUES**
- IT MAY ALSO DEFAULT TO COUNT IF THERE ARE BLANK ENTRIES IN THE COLUMN YOU ARE USING FOR BLANK OR IF THEY HAVE BEEN FORMATTED AS TEXT.
- YOU CAN NORMALLY REMEDY THIS BY JUST CHANGING IT TO SUM AGAIN.
- IF IT PERSISTS, YOU MAY NEED TO GO BACK TO THE SOURCE MAKE SURE IT'S CORRECTLY FORMATTED AND REFRESH YOUR PIVOT TABLE AGAIN.
- IF YOU WANT TO SHOW CALCULATIONS OTHER THAN THE STANDARD SUM OR COUNT, RIGHT CLICK ON THE DATA, THEN CHOOSE **SUMMARIZE VALUES BY** AND YOU WILL SEE A LIST OF THE ALTERNATE WAYS EXCEL CAN CALCULATE YOUR DATA FOR YOU E.G. MAX, MIN, AVERAGE.

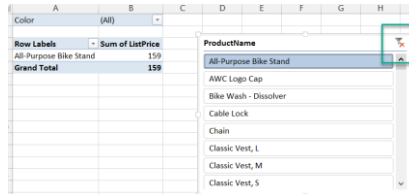
ADD A PIVOT CHART

- CLICK IN YOUR PIVOT TABLE.
- CLICK ON **ANALYZE | PIVOT CHART (EXCEL 2013. IN EXCEL 2010 IT IS OPTIONS | PIVOT CHART)**
- INSERT YOUR PIVOT CHART.
- NOTE THAT THE BEAUTY OF USING A PIVOT CHART IS THAT YOUR CHART WILL UPDATE AS YOU FILTER OR REFRESH YOUR DATA.
- YOU CAN COPY AND PASTE YOUR PIVOT CHART INTO A POWERPOINT PRESENTATION BY COPYING THE CHART, NAVIGATING TO POWERPOINT, CHOOSE A NEW BLANK SLIDE AND THEN PASTE. NOTE THAT YOU CAN GET DIFFERENT OUTCOMES DEPENDING ON THE TYPE OF PASTE YOU CHOOSE

ADD A SLICER (EXCEL 2010 AND LATER ONLY)

- THIS HAS BEEN DESCRIBED AS A "FANCY FILTER" BUT MANY PEOPLE FIND IT VERY USEFUL.
- CLICK ON YOUR PIVOT TABLE

- CLICK ON **INSERT SLICER**
- CHOOSE THE FIELDS(S) YOU WANT TO APPLY THE SLICER TO
- NOTE NOW HOW YOUR PIVOT TABLE AND CHART CAN CHANGE DEPENDING ON WHAT ENTRY YOU CLICK ON.
- USE THE CTRL KEY TO SELECT MULTIPLE ENTRIES
- CLEAR THE FILTER BY CLICKING ON THE FILTER ICON ON TOP RIGHT HAND CORNER.

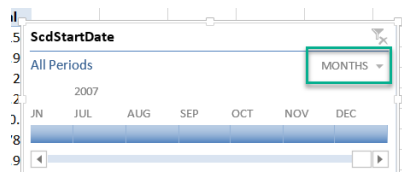


- YOU CAN REMOVE THE SLICER BY CLICKING ON IT AND PRESSING THE DELETE KEY

ADDING A TIMELINE (EXCEL 2013 AND LATER ONLY)

THIS ALLOWS YOU TO FILTER YOUR DATA BY TIME I.E. BY MONTHS/QUARTERS/YEARS

- CLICK IN YOUR PIVOT TABLE.
- CLICK ON **ANALYZE | INSERT TIMELINE**
- THE DATE FIELDS YOU HAVE IN YOUR DATA APPEAR ON THE LIST
- CHOOSE THE ONE YOU WANT TO USE FOR YOUR TIMELINE



- YOU CAN THEN USE THE SCROLL BAR TO SELECT SPECIFIC DATE RANGES.
- YOU CAN REMOVE THE TIMELINE BY CLICKING ON IT AND PRESSING THE DELETE KEY

APPLY CONDITIONAL FORMATTING TO YOUR PIVOT TABLE.

- CLICK IN YOUR PIVOT TABLE.
- CHOOSE **HOME | CONDITIONAL FORMATTING | COLOR SCALES**.
- CHOOSE THE FIRST OPTION
- YOU WILL SEE ONE CELL SELECTED. CLICK ON IT AND CHOOSE THE THIRD OPTION DOWN
- THIS APPLIES THIS "HEAT MAP" EFFECT TO ALL THE PIVOT TABLE
- YOU CAN REMOVE THE CONDITIONAL FORMATTING BY **HOME | CONDITIONAL FORMATTING | CLEAR RULES | CLEAR RULES FROM THIS PIVOT TABLE**.

YOUR EXCEL SURVIVAL KIT: A GUIDE TO SURVIVING AND THRIVING IN AN EXCEL WORLD.



A FULL CHAPTER OF THE BOOK IS DEVOTED TO PIVOT TABLES IF YOU WOULD LIKE TO READ MORE.

YOU CAN PURCHASE THE BOOK AT AMAZON – JUST SEARCH FOR "EXCEL SURVIVAL KIT".

YOU CAN GET A SIGNED COPY FOR €10 PLUS P&P FROM ME BY EMAILING anne@the-excel-expert.com