

Microsoft Excel – Pivot Tables

[Mac – Office 2011]

Pivot Tables are one of the most robust built-in tools in Excel and help you sort, filter, analyze and display data in large spreadsheets.

Preparing Your Data

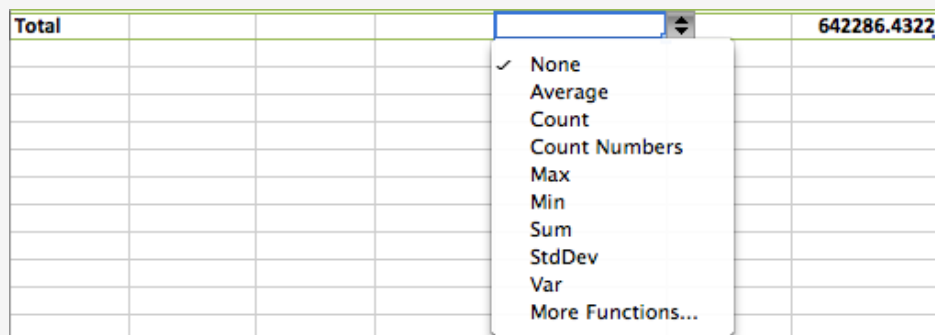
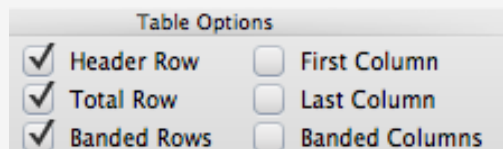
1. Make sure your Worksheet/Data has clear headers, and that there are no blank/empty rows or columns. Blank cells (for criteria that does not contain any data) are okay.
2. Create an Excel Table
An Excel Table is a preformatted table that defines the area of the data in your spreadsheet. It is much easier to use this tool rather than highlighting the area you want to Pivot, especially for large spreadsheets.
 - a. Click on any cell in your data area.
 - b. Click the **Tables Tab** on your ribbon.
 - c. Select a **Table Style** in the Ribbon. Excel will apply this style to all the data in your spreadsheet.

Excel Table Tips

Once you've converted your data to an Excel Table, you can easily add a **Total Row** to the bottom of your table.

1. On the **Tables Tab**, click **Total Row**.
2. Scroll to the bottom of your table.

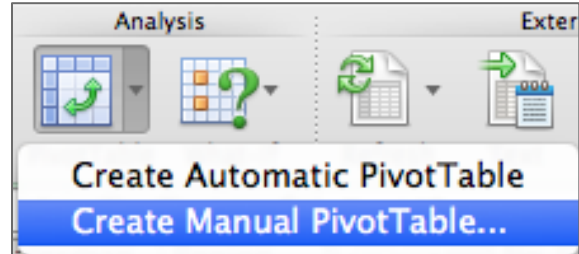
A Total Row is now visible. You can click in any cell in your total row and use the pull-down menu that appears to add, average or perform other functions in that cell.



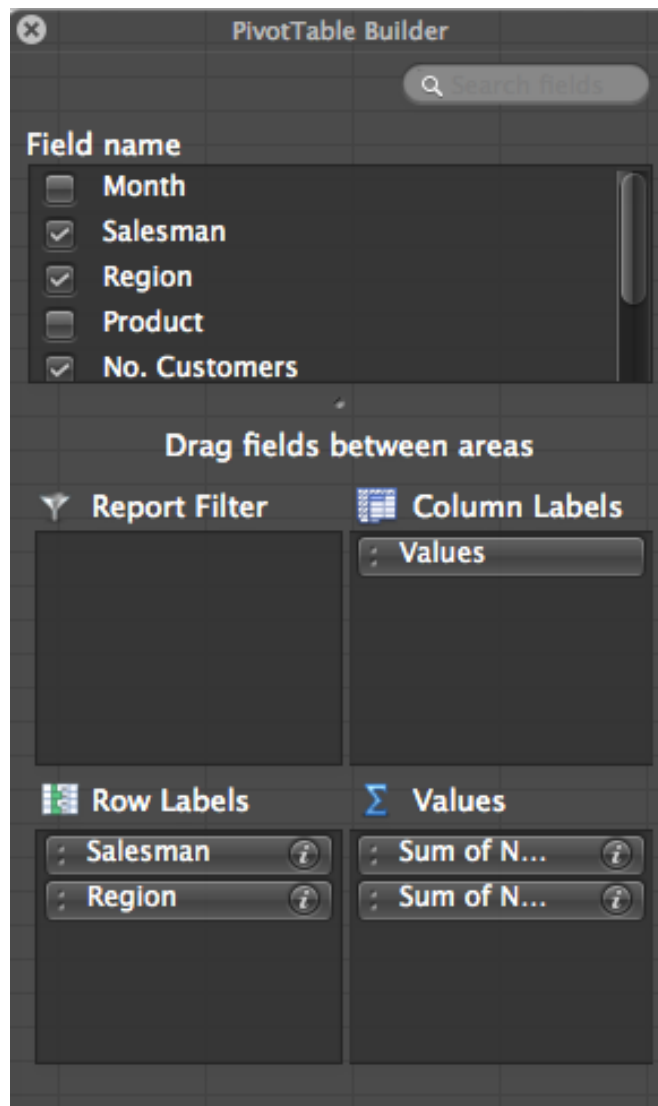
Making a Pivot Table

Though Excel offers the option to build a Pivot Table for you, it's best to build one from scratch to provide you with the most options and flexibility.

1. Click anywhere in your Excel Table.
2. Click the **Data Tab** on your Ribbon.
3. Click the arrow to the right of the **Pivot Table** button.
4. Select **Create Manual PivotTable**
5. Click **OK** in the Window that appears. Your empty Pivot Table will appear in a new worksheet within your workbook, and the **Pivot Table Builder** will appear.



Click the check box next to the data you want to work with/summarize.



You can have stacked row labels to view multiple criteria

These are the numbers in your columns that you're comparing. The default is "SUM." Click the little *i* to change the function.

Managing Data Within the Pivot Table

Based on the criteria in the Pivot Table Builder on the previous page, this is what the Pivot Table looks like:

You can click on the Filter Arrow next to the Row Labels to filter out certain data. In this example, if you wanted to only view the data for a couple of salesmen.

You can click the arrow next to the main Row label, in this case "Salesman", to collapse and expand data.

| Values | | |
|--------------------|----------------------|------------------|
| Row Labels | Sum of No. Customers | Sum of Net Sales |
| ▼ Joseph | 2171 | 432607 |
| Middle | 695 | 148067 |
| North | 740 | 139014 |
| West | 736 | 145526 |
| ▼ Lawrence | 2149 | 430491 |
| Middle | 708 | 141498 |
| North | 730 | 151339 |
| West | 711 | 137654 |
| ▼ Maria | 2166 | 419554 |
| Middle | 736 | 142013 |
| North | 698 | 138118 |
| West | 732 | 139423 |
| ▼ Matt | 2154 | 431661 |
| Middle | 715 | 141224 |
| North | 709 | 139249 |
| West | 730 | 151188 |
| Grand Total | 8640 | 1714313 |

Other Pivot Table Tools

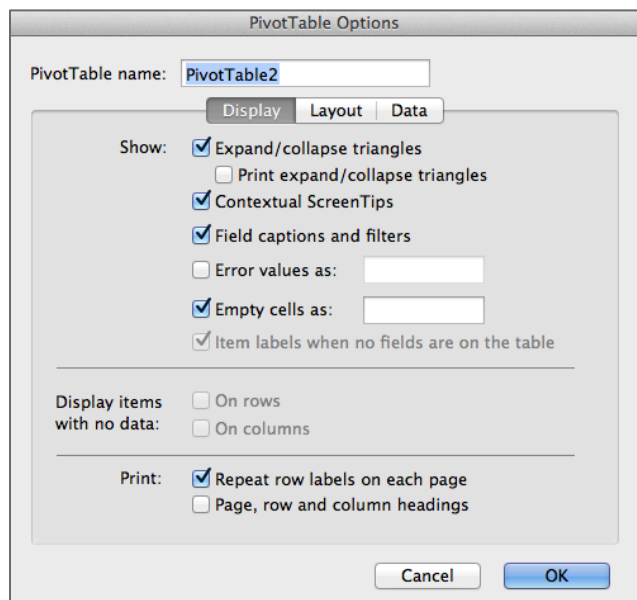
All Pivot Table tools are found in the Pivot Tables tab on your ribbon. You have to click a cell in your Pivot Table for the tab to be visible.

Options



You can change the options for how your Pivot Table looks and is printed by clicking the **Options** button.

The most common options you might want to alter are how Empty Cells in your data source are dealt with and what you want printed.



PivotTable Options

PivotTable name: PivotTable2

Display Layout Data

Show:

- Expand/collapse triangles
- Print expand/collapse triangles
- Contextual ScreenTips
- Field captions and filters
- Error values as:
- Empty cells as:
- Item labels when no fields are on the table

Display items with no data:

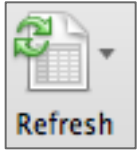
- On rows
- On columns

Print:

- Repeat row labels on each page
- Page, row and column headings

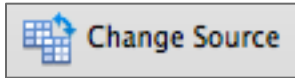
Cancel OK

Refreshing your Pivot Table



If you change your data source, you can easily update your Pivot Table by clicking the **Refresh** button.

Changing Your Data Source



If you have multiple data sources with the same headers and are pleased with how your Pivot Table looks, use the **Save As** option to create a copy of your Pivot Table and then click the **Change Data Source** button and find the new data for your Pivot Table.