Lesson 1 Pivot Tables

A Pivot Table is an excellent tool to analyse data e.g. suppose you have the following spreadsheet that contains data about sales for your organization. **1**

	A	B	C	D	E
1	Store	Sales Rep	Quota	YTD Sales	
2	Decatur	Smith	50000	35000	
3	Decatur	Johnson	50000	28000	
4	Decatur	Reed	50000	15000	
5	Marietta	Watson	60000	8000	
6	Marietta	Knight	60000	9000	
7	Dunwoody	Cook	40000	19000	
8	Dunwoody	Payne	40000	18000	
9	Dunwoody	Gills	40000	17000	
10	Douglasville	Williams	70000	25000	
11	Douglasville	Cox	70000	26000	
12	Atlanta	Allen	80000	32000	
13	Atlanta	Sutton	80000	34000	
14	Atlanta	Webb	80000	31000	
15					

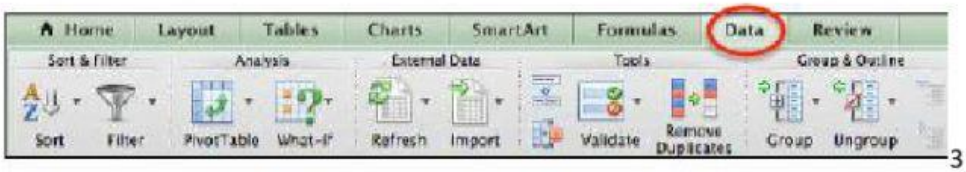
1

A *PivotTable* could be created for the spreadsheet above to help you to better analyse the numbers. The following explains how to create a *PivotTable*.

1. Click to select any cell that has data within the spreadsheet.**2**

2

2. Click the **Data** tab **3**



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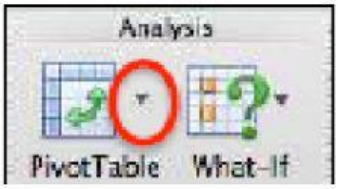
3. Click the arrow next to the *PivotTable* button, which is located in the **Analysing** group.**4**



4

4. In the menu that appears, select **Create** manual *PivotTable*.**5**

5. In the create Pivot Table window that appears, click New worksheet**(5).**Then click the **OK** button.

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6. An empty **PivotTable** and the **PivotTable** Builder will appear on your screen. **6 & 7**

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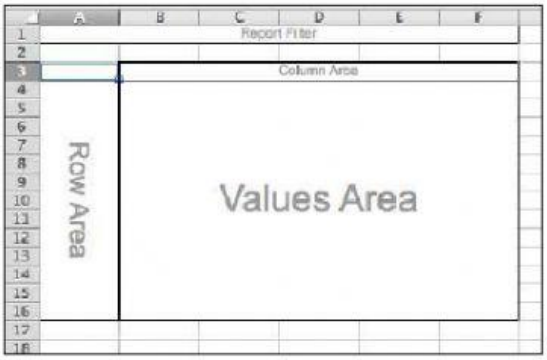

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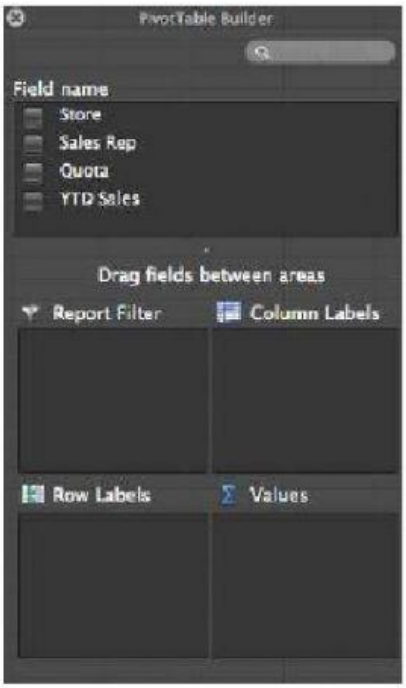

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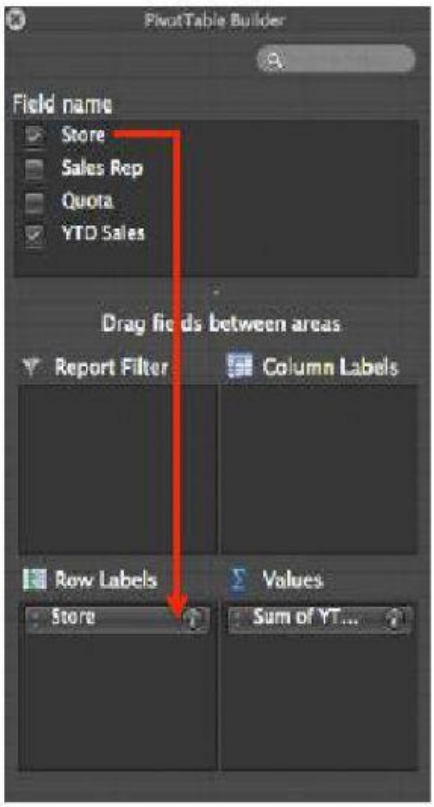
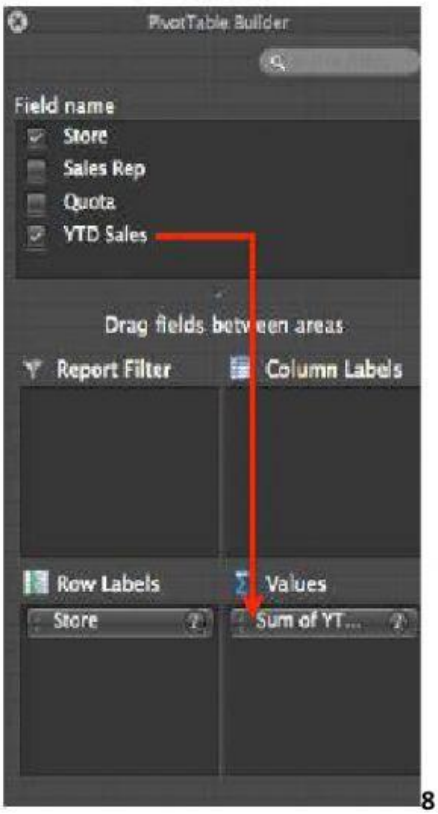
7. You may now begin building your **PivotTable**, e.g. if you wanted to see the tables that each store has , you could do the following **8 & 9.**





8 & 9

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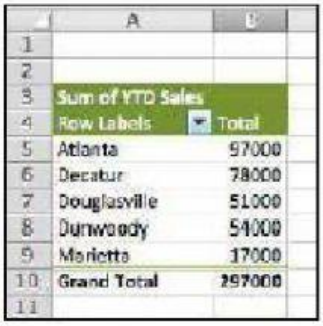
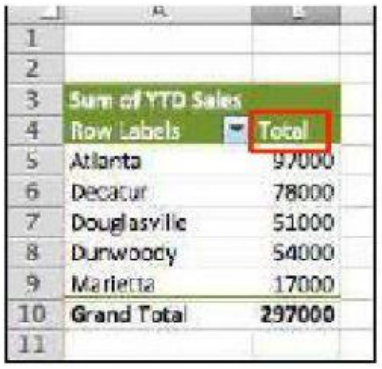
This would result in a new sheet appearing as indicated in **10.**



	A	B
1		
2		
3	Sum of YTD Sales	
4	Row Labels	Total
5	Atlanta	97000
6	Decatur	78000
7	Douglasville	51000
8	Dunwoody	54000
9	Marietta	17000
10	Grand Total	297000
11		

10

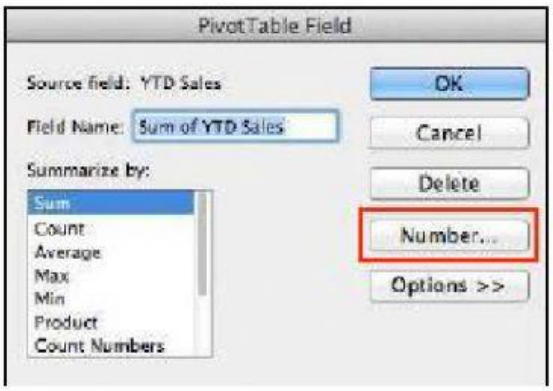
8. Next, you may want to format the *Total* column. E.g., you may want to make the numbers in the **Total** column appear as currency. To do this, allow you mouse pointer to hover over *Sum of YTD Sales* that is located in **cell A3 (11)** and double-click.



1		
2		
3	Sum of YTD Sales	
4	Row Labels	Total
5	Atlanta	97000
6	Decatur	78000
7	Douglasville	51000
8	Dunwoody	54000
9	Marietta	17000
10	Grand Total	297000
11		

11

9. The **PivotTable** window will appear on your screen. To format the numbers so that they appear as currency, click the **Number** button. **12**



12

10. The Format cells window will appear on your screen. Under the Category column, select Currency. Then, click the OK button to close the window.

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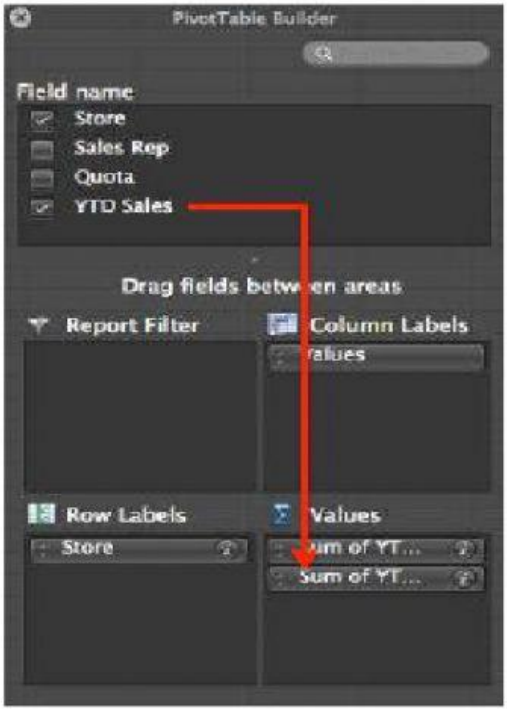
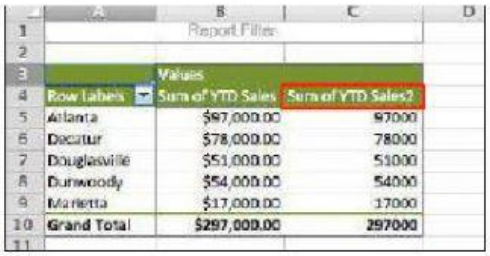
11. Next, in the **PivotTable** Field window, click the **OK** button. The formatting will be applied to the **Total** column.
12. Perhaps you want to see other data in the **PivotTable** in addition to **Total**, e.g. you may want to see the **Average** sales for each store location. To display, the **Average** for each store location, drag another *YTD Sales field* to the **Values** window. **13**



13

13. Double-click the column heading for the second column that appears on the *spreadsheet*. **14**



	A	B	C	D
1		Report Filter		
2				
3		Values		
4	Row Labels	Sum of YTD Sales	Sum of YTD Sales2	
5	Atlanta	$97,000.00	97000	
6	Decatur	$78,000.00	78000	
7	Douglasville	$51,000.00	51000	
8	Dunwoody	$54,000.00	54000	
9	Marietta	$17,000.00	17000	
10	Grand Total	$297,000.00	297000	
11				

14

14. The *PivotTable Field* window will appear. To find the average, click *Average* as indicated in. **15.**

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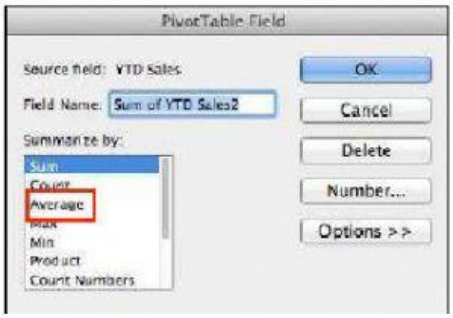
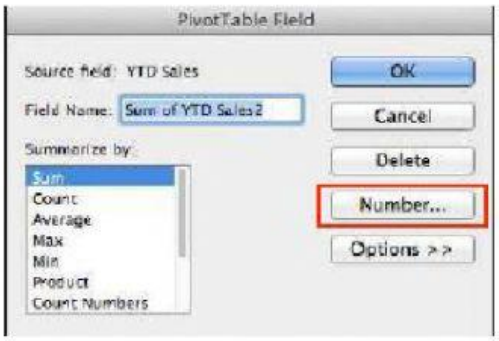


15

15. To allow the numbers to appear as the *Currency* format, click the *Number* button. **16**.



16

16. The *Format* cells window will appear. Under category, click *Currency*. Then, click the ***OK*** button to close the window.
17. For the *PivotTable* window, click the **OK** button, to close the window.

18. Another column will appear with the average sales for each store . **17**

	A	B	C	D
1				
2				
3		Values		
4	Row Labels	Sum of YTD Sales	Average of YTD Sales2	
5	Atlanta	$97,000.00	$32,333.33	
6	Decatur	$78,000.00	$26,000.00	
7	Douglasville	$51,000.00	$25,500.00	
8	Dunwoody	$54,000.00	$18,000.00	
9	Marietta	$17,000.00	$8,500.00	
10	Grand Total	$297,000.00	$22,846.15	
11				

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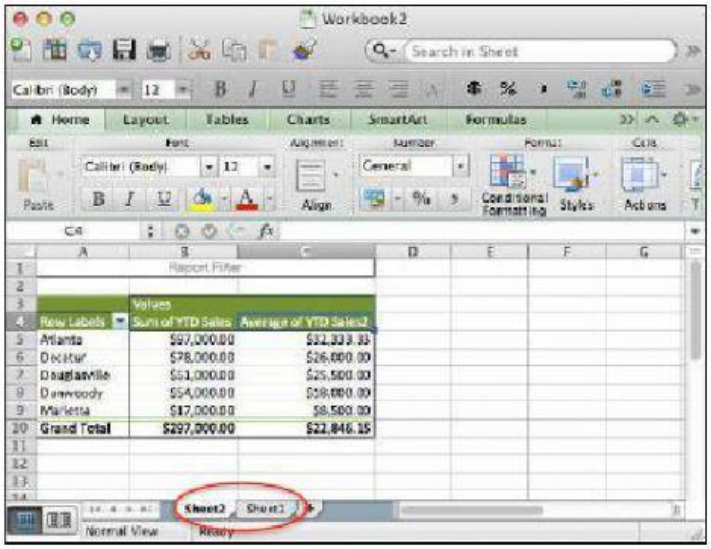
19. To return to the worksheet containing the original data, click the *Sheet 1* in the lower left area of the window. **18**



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Questions

1. **Explain the steps to create a PivotTable**

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