

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	Gillis	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

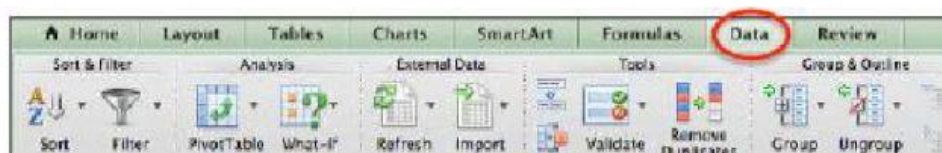
A *PivotTable* could be created for the spreadsheet above to help you to better analyse the numbers. The following explains how to create a *PivotTable*.

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



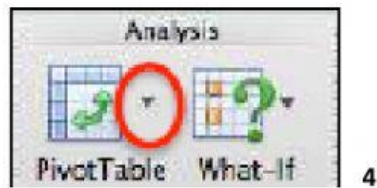
2

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

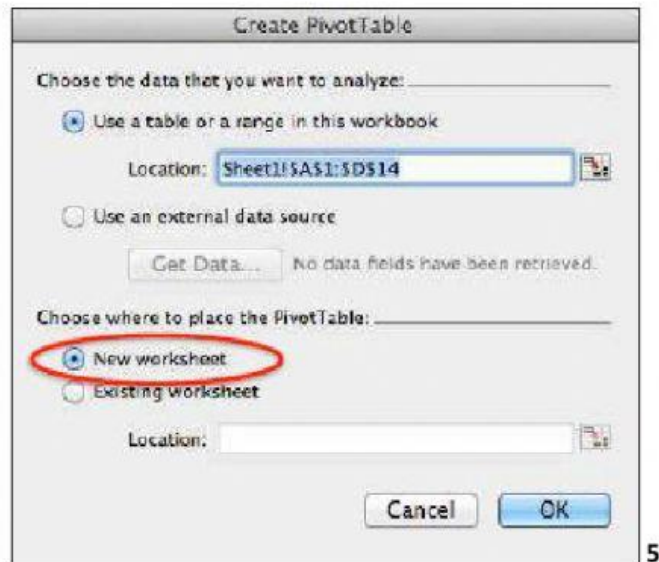


3

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



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

	A	B	C	D	E	F
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						

6

PivotTable Builder

Field name

- Store
- Sales Rep
- Quota
- YTD Sales

Drag fields between areas

Report Filter

Column Labels

Row Labels

Values

7

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.

PivotTable Builder

Field name

- Store
- Sales Rep
- Quota
- YTD Sales

Drag fields between areas

Report Filter

Column Labels

Row Labels

Values

Store

Sum of YTD Sales

PivotTable Builder

Field name

- Store
- Sales Rep
- Quota
- YTD Sales

Drag fields between areas

Report Filter

Column Labels

Row Labels

Values

Store

Sum of YTD Sales

8 & 9

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.

	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		

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**

PivotTable Field

Source field: YTD Sales

Field Name: Sum of YTD Sales

Summarize by:

- Sum
- Count
- Average
- Max
- Min
- Product
- Count Numbers

OK

Cancel

Delete

Number...

Options >>

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.

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



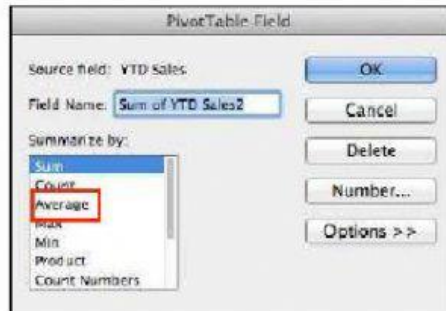
13

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	Dacula	\$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				

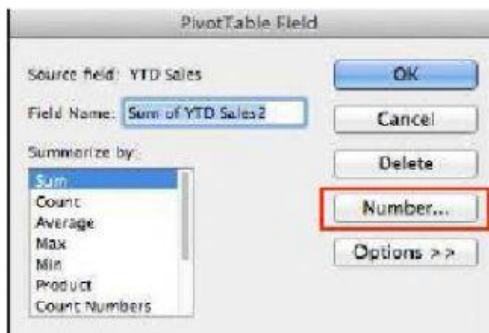
14

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



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.

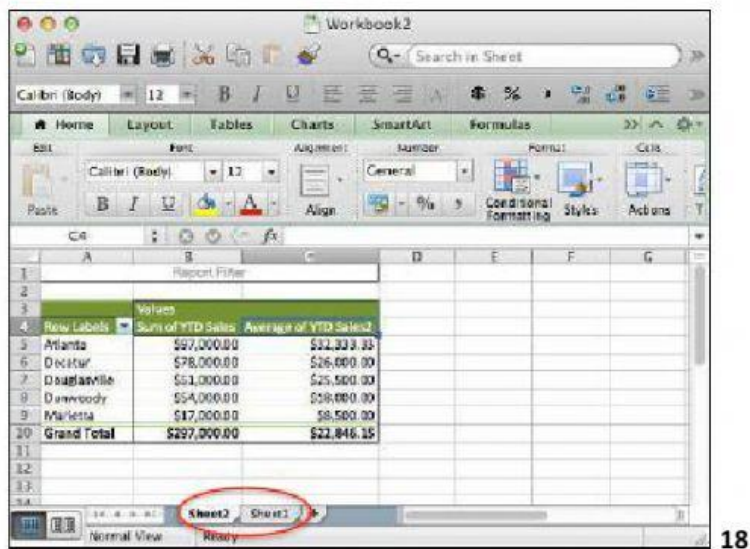
17. For the *PivotTable* window, click the **OK** button, to close the window.

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				

17

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



Questions

1. Explain the steps to create a PivotTable