

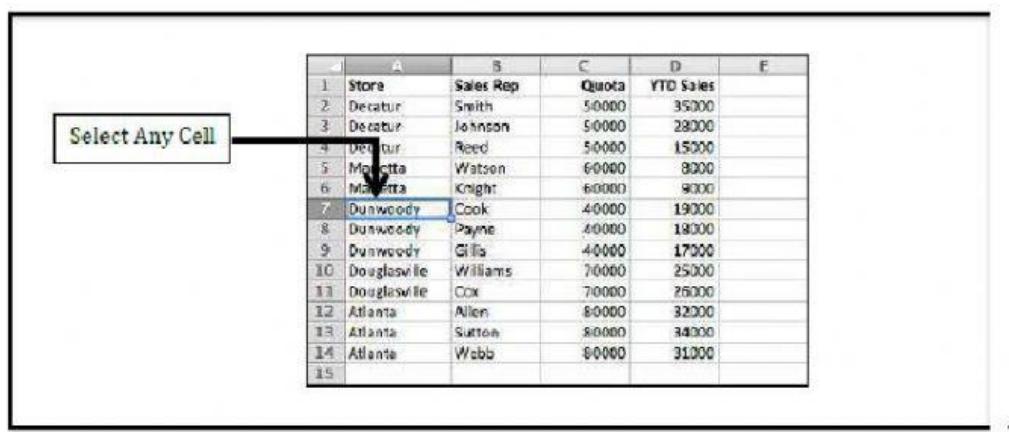
# Lesson 1 Pivot Tables

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



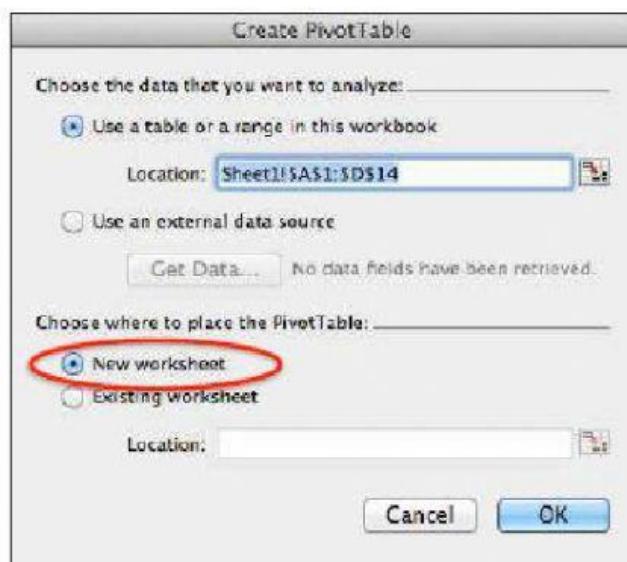
3

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



**4**

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.



**5**

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

6

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.

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		

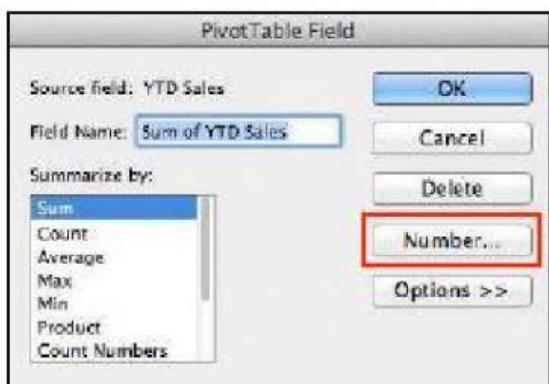
10

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 your 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

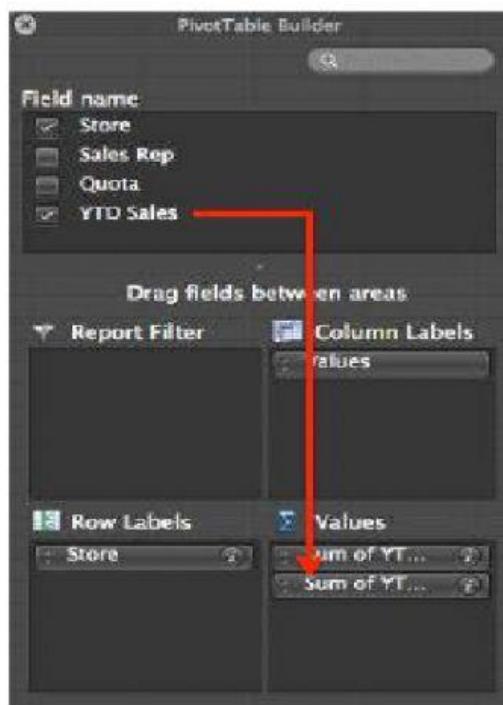
9. The **PivotTable** window will appear on your screen. To format the numbers so that they appear as currency, click the **Number** button. 12



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**



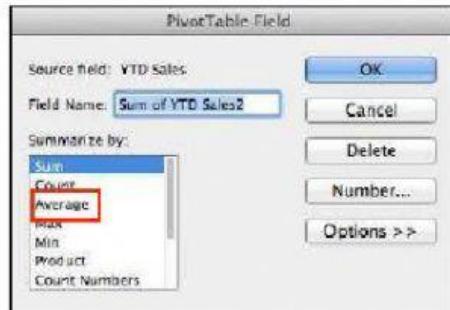
**13**

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

	A	B	C	D
1				
2				
3		Values		
4	Row labels	Sum of YTD Sales	Sum of YTD Sales?	
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				

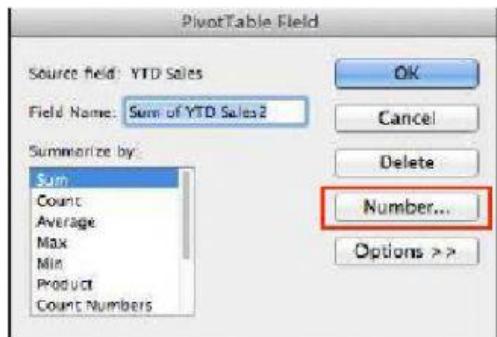
**14**

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



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.

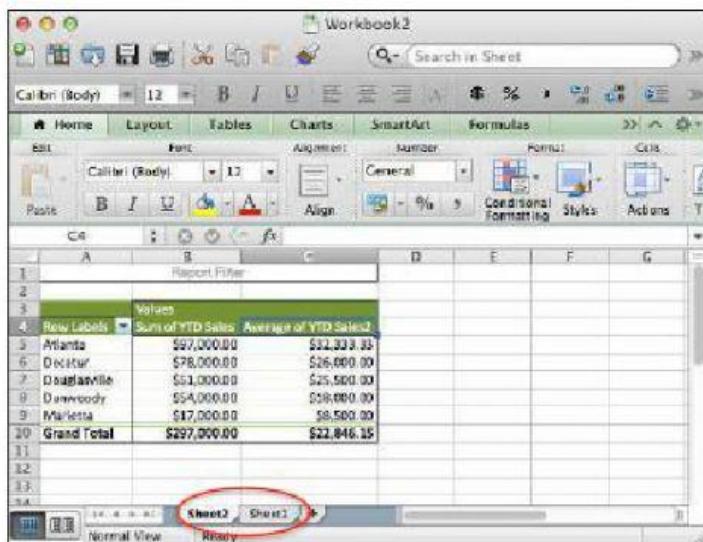
17. For the *PivotTable* window, click the **OK** button, to close the window.

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

	A	B	C	D
1				
2				
3	Values			
4	Row Labels <input checked="" type="checkbox"/> 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	\$5,666.67	
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**



The screenshot shows a Microsoft Excel window titled 'Workbook2'. The ribbon is visible with tabs for Home, Layout, Tables, Charts, SmartArt, Formulas, and other options. The Home tab is selected. The main area displays a PivotTable on 'Sheet2'. The PivotTable has 'Row Labels' set to 'Sum of YTD Sales' and 'Average of YTD Sales'. The data includes cities like Atlanta, Decatur, Douglasville, Doraville, and Marietta, along with their respective sales figures. A 'Report Filter' is present in the top-left of the PivotTable area. The bottom of the window shows the ribbon tabs and the status bar indicating 'Normal View' and 'Ready'. The tab bar at the bottom shows 'Sheet2' and 'Sheet1' (which is circled in red). The number '18' is located in the bottom right corner of the window.

## Questions

1. Explain the steps to create a PivotTable