Mount Allison
UNIVERSITY

Microsoft EXCEL Training
Level 3

Introduction

This tutorial covers creating and using a pivot table to extract different information from one data sample. This course will give you the skills to use a Pivot Table to produce meaningful analysis and charts from a simple table of information.

Topics Include

- Creating a Pivot Table
- Analysing Data using Pivots
- Filtering and Slicers
- Creating a Pivot Chart Report
- Working with multiple Values Areas

Prerequisite

Comfortable with Windows 7, or OSX

Platform

Windows, OSX

Software

Microsoft Excel 2013, Microsoft Excel 2010 (Windows)

Microsoft Excel 2011 (MAC)

Instructor

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1. Pivot Tables

When you have a lot of data, it can sometimes be difficult to analyze all of the information in your worksheet. **PivotTables** can help make your worksheets more manageable by **summarizing** data and allowing you to **manipulate** it in different ways.

Using PivotTables to answer questions

Suppose we wanted to answer the question: **"What is the amount sold by each salesperson?"** for the sales data in the example below. Answering this question could be very time-consuming and difficult—each salesperson appears on multiple rows, and we would need to total all of their different orders individually. We could use the **Subtotal** command to help find the total for each salesperson, but we would still have a lot of data to work with.

	A	B	C	D	E
1	Salesperson	Region	Account	Order Amount	Month
2	Albertson, Kathy	East	29386	$925.00	January
3	Albertson, Kathy	East	74830	$875.00	February
4	Albertson, Kathy	East	90099	$500.00	February
5	Albertson, Kathy	East	74830	$350.00	March
6	Brennan, Michael	West	82853	$400.00	January
7	Brennan, Michael	West	72949	$850.00	January
8	Brennan, Michael	West	90044	$1,500.00	January
9	Brennan, Michael	West	82853	$550.00	February
10	Brennan, Michael	West	72949	$400.00	March
11	Davis, William	South	55223	$235.00	February
12	Davis, William	South	10354	$850.00	January
13	Davis, William	South	50192	$600.00	March
14	Davis, William	South	27589	$250.00	January
15	Dumlao, Richard	West	67275	$400.00	January
16	Dumlao, Richard	West	41828	$965.00	February
17	Dumlao, Richard	West	87543	$125.00	March
18	Flores, Tia	South	97446	$1,500.00	March
19	Flores, Tia	South	41400	$305.00	January
20	Flores, Tia	South	30974	$1,350.00	January
21	Flores, Tia	South	41400	$435.00	February
22	Flores, Tia	South	30974	$550.00	February

Fortunately, a **PivotTable** can instantly **calculate** and **summarize** the data in a way that's both easy to read and manipulate. When we're done, the PivotTable will look something like this:

Row Labels	Sum of Order Amount
Albertson, Kathy	2650
Brennan, Michael	3700
Davis, William	1935
Dumlao, Richard	1490
Flores, Tia	4565
Post, Melissa	1690
Thompson, Shannon	3160
Walters, Chris	4375
Grand Total	23565

Once you've created a PivotTable, you can use it to answer different questions by rearranging, or **pivoting**, the data. For example, if we wanted to answer the question: **"What is the total amount sold in each month?"** we could modify our PivotTable to look like this:

Row Labels	Sum of Order Amount
January	9090
February	9160
March	5315
Grand Total	23565

1.1. Create a Pivot Table

Being able to analyse all the data in your worksheet can help you make better business decisions. But sometimes it's hard to know where to start, especially when you have a lot of data. Excel can help you by **recommending** and then automatically creating PivotTables, which are a great way to summarize, analyse, explore, and present your data.

✎ TIP: Make sure your data has column headings or table headers, and that there are no blank rows.

1. Select the **table** or **cells** (including column headers) containing the data you want to use.

2. From the **Insert** tab, click the **Recommended Pivot** tables.

> Mac Users (2011) – Data tab / Create Automatic Pivot Table

3. In the Recommended PivotTables dialog box, click any PivotTable layout on the left to get a preview to the right, and then pick the one that shows the data the way you want.

4. Click **OK**.

5. Excel places the PivotTable on a new worksheet and shows the Field List so you can further rearrange the PivotTable data as needed.