



University Information
Technology Services

Microsoft Office

Excel 2016 for Windows

PivotTables & PivotCharts

University Information Technology Services

Learning Technologies, Training & Audiovisual Outreach

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University Information Technology Services

Microsoft Office: Excel 2016 for Windows

PivotTables & PivotCharts

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Introduction

This booklet is the companion document to the Excel 2016: PivotTables and Pivot Charts workshop. The booklet will explain PivotTables and Pivot Charts, how to create them, and how to use them to quickly analyze large quantities of data.

Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Define PivotTables and Pivot Charts
- Insert PivotTables
- Insert Pivot Charts
- Filter information in your PivotTable and Pivot Chart
- Use Slicers

PivotTables

PivotTables are a powerful tool in Excel that will allow you to quickly summarize, sort, filter, and analyze data. They can handle large amounts of data in lists and tables by organizing data, on the fly, by different rows and columns. This is faster, and more flexible for analyzing your data, as you don't need to rely on formulas.

For example, you could have a spreadsheet that contains information on salespeople, products sold, regions, items sold, etc. Using a PivotTable, you can quickly organize the data so different relationships are visible (e.g. Who is the top salesperson? What product has sold the most?).

Salesperson	Product	Region	Customer	Date	Item Cost	No.Items	Total Cost
Vaughn, Harlon	Captain Recliner	NE	B&B Spaces	01/03/11	\$ 340.95	9	\$ 3,068.55
Norman, Rita	Media Armoire	SE	Home USA	01/03/11	\$ 340.95	2	\$ 681.90
Christensen, Jill	Bamboo End Table	NW	Ellington Designs	01/04/11	\$ 79.99	7	\$ 559.93
Norman, Rita	Bamboo Coffee Table	SE	Ellington Designs	01/05/11	\$ 168.95	3	\$ 506.85
Byrd, Asa	Bamboo End Table	SE	B&B Spaces	01/05/11	\$ 79.99	12	\$ 959.88
Owen, Robert	Chameleon Couch	SW	Ellington Designs	01/07/11	\$ 799.95	13	\$10,399.35
Maynard, Susan	Bamboo End Table	NE	Home USA	01/08/11	\$ 79.99	10	\$ 799.90
Norman, Rita	Chameleon Couch	SE	Home USA	01/08/11	\$ 799.95	2	\$ 1,599.90
Norman, Rita	Media Armoire	SE	Home USA	01/08/11	\$ 340.95	6	\$ 2,045.70
Norman, Rita	Media Armoire	SE	B&B Spaces	01/11/11	\$ 340.95	13	\$ 4,432.35

Figure 1 - Sample Sales Spreadsheet

Note: When working with PivotTables, the data should contain your titles in a single row, and the table should not contain any empty cells.

Creating PivotTables

The following will show you how to create a PivotTable using the sample sales spreadsheet as an example:

1. In the *Ribbon*, Click the **Insert** tab.

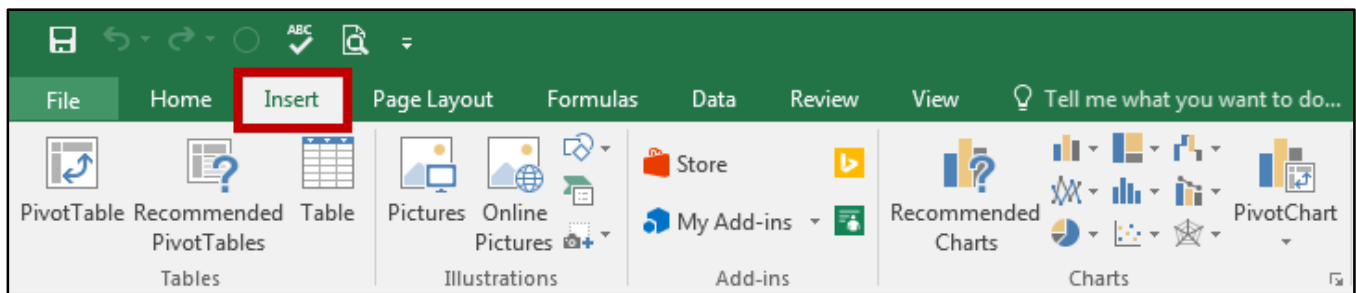


Figure 2 - Insert Tab

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