

EXCEL 2010:PIVOT TABLES

Objectives:

- Learn how to set up your data in Excel in a format that you can use for a pivot table.
- Create a pivot table with that data
- Filter pivot table reports
- Change the summary function used in the pivot table
- Format a pivot table and change pivot table options.
- Change the pivot table report to reflect different views on the same data.
- Create a PivotChart with your pivot table

ABOUT PIVOT TABLES

Analyze and summarize data without disturbing the original data set

Sort to look up data in chronological order

Filter to limit scope to certain values you specify.

Place the pivot table on its own worksheet.

Use pivot tables to produce pivot charts to present the information in a graphical way.

SETTING UP DATA FOR USE IN PIVOT TABLES

1. Organize data in **columns with headings**. These headings will be used when you create the pivot table, and things will get very confusing without headings. -
2. Make sure there are **no empty columns or rows** in your data. Excel is good at sensing the start and end of a data table by looking for empty rows and columns at which point it stops.
 - Empty cells are OK.
 - A whole row of column of empty cells is NOT OK.
3. Consistent data in all cells.
 - If you have a date column, make sure all values in that column are dates (or blank).
 - If you have a quantity column, make sure all values are numbers (or blank) and not words.

CREATE A PIVOT TABLE FROM EXCEL WORKSHEET DATA

1. Open Data.xlsx (find file at <http://www.siumed.edu/lib/libclasses.html#excelpivot>)and Save As Data Pivot.xlsx
2. On Sheet 1 click in any cell in the data table.
3. Click on the Insert menu, and then click the **PivotTable Button**



4. The entire data range selected will be listed
5. Choose to place the PivotTable in a new worksheet and click OK. (Figure 1)

The screenshot displays the Microsoft Excel interface with the 'Create PivotTable' dialog box open. The dialog box is titled 'Create PivotTable' and contains the following options:

- Choose the data that you want to analyze:**
 - Select a table or range
 - Table/Range: Sheet1!\$A\$1:\$F\$214
 - Use an external data source
 - Choose Connection...
 - Connection name:
- Choose where you want the PivotTable report to be placed:**
 - New Worksheet
 - Existing Worksheet
 - Location:

Buttons for 'OK' and 'Cancel' are visible at the bottom right of the dialog box. The background spreadsheet shows a table with the following data:

Order ID	Product	Category	Amount	Date	Country
1	Carrots	Vegetables	\$4,270	1/6/2012	United States
2	Broccoli	Vegetables	\$8,239	1/7/2012	United Kingdom
3	Banana	Fruit	\$617	1/8/2012	United States
4	Banana	Fruit	\$8,384	1/10/2012	Canada
5	Beans	Vegetables	\$2,626	1/10/2012	Germany
6	Orange	Fruit	\$3,610	1/11/2012	United States
7	Broccoli	Vegetables	\$9,062	1/11/2012	Australia
8	Banana	Fruit	\$6,906	1/16/2012	New Zealand
9	Apple	Fruit	\$2,417	1/16/2012	France
10	Apple	Fruit	\$7,431	1/16/2012	Canada
11	Banana	Fruit	\$8,250	1/16/2012	Germany
12	Broccoli	Vegetables	\$7,012	1/18/2012	United States
13	Carrots	Vegetables	\$1,903	1/20/2012	Germany
14	Broccoli	Vegetables	\$2,824	1/22/2012	Canada
15	Apple	Fruit	\$6,946	1/24/2012	France
16	Banana	Fruit	\$2,320	1/27/2012	United Kingdom
17	Banana	Fruit	\$2,116	1/28/2012	United States
18	Banana	Fruit	\$1,135	1/30/2012	United Kingdom
19	Broccoli	Vegetables	\$3,595	1/30/2012	United Kingdom
20	Apple	Fruit	\$1,161	2/2/2012	United States
21	Orange	Fruit	\$2,256	2/4/2012	France
22	Banana	Fruit	\$1,004	2/11/2012	New Zealand
23	Banana	Fruit	\$3,642	2/14/2012	Canada
24	Banana	Fruit	\$4,582	2/17/2012	United States
25	Beans	Vegetables	\$3,559	2/17/2012	United Kingdom
26	Carrots	Vegetables	\$5,154	2/17/2012	Australia
27	Mango	Fruit	\$7,388	2/18/2012	France
28	Beans	Vegetables	\$7,163	2/18/2012	United States

Figure 1

A PivotTable empty placeholder will appear on the left. On the right is the PivotTable Field List task pane. (Figure 2)

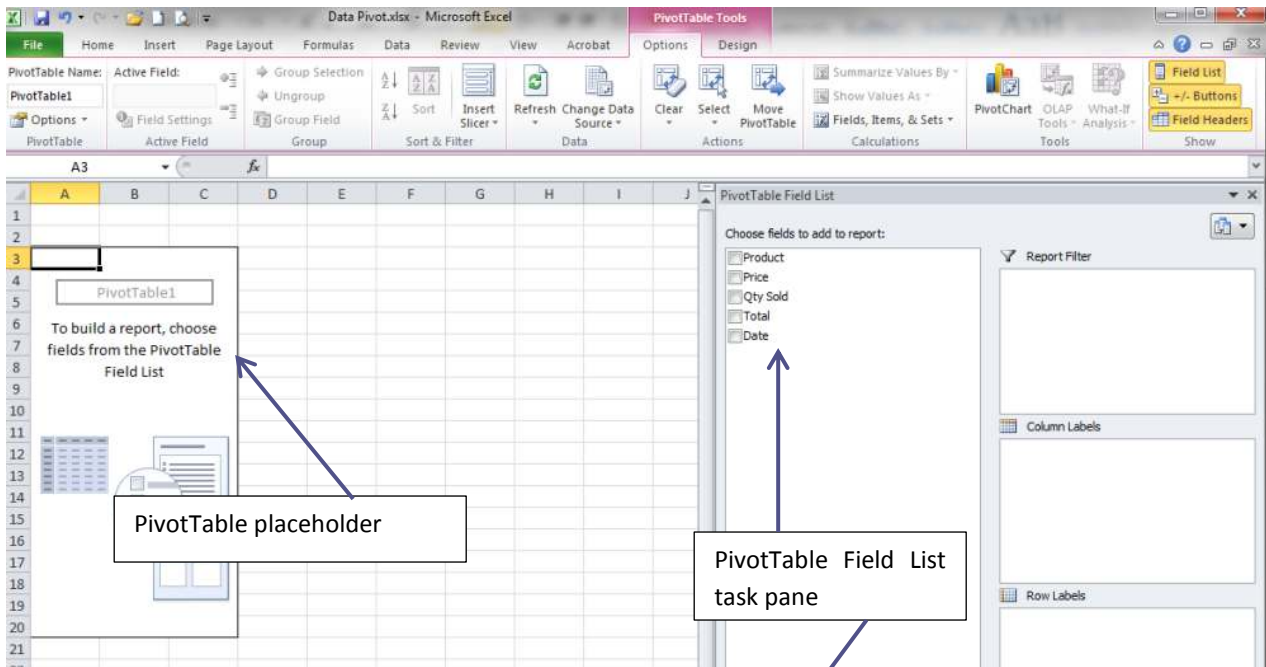
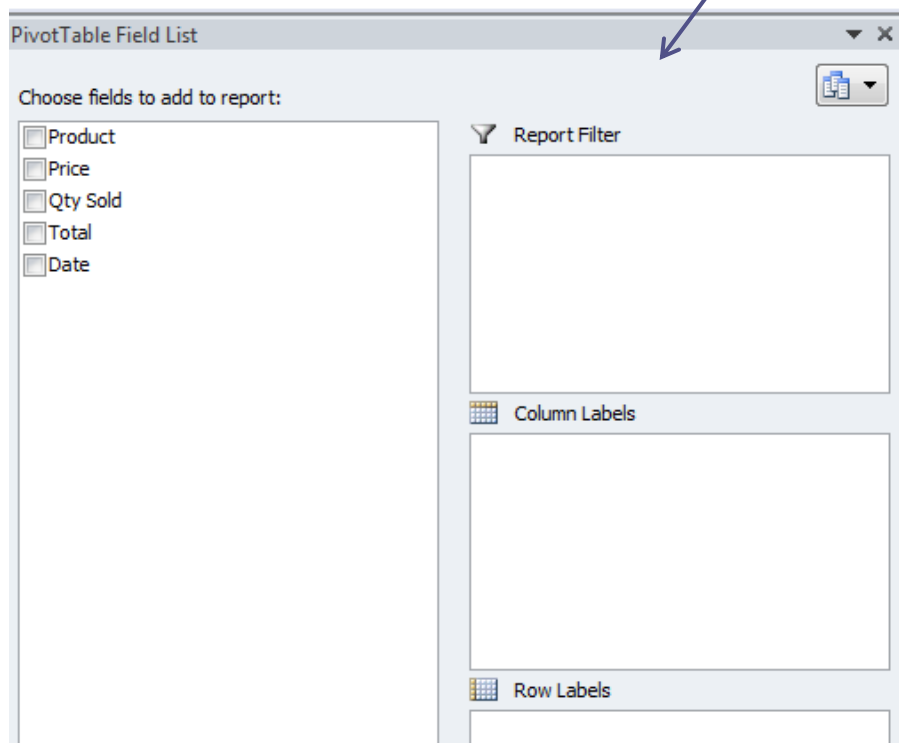


Figure 2

The column headings from your data table should be listed:



DESIGN YOUR PIVOT TABLE LAYOUT

To create the layout, you need to first select the fields you want in your table, and then place them in the correct location.

Drag and drop each field to the area you want. Although you can check the boxes for the fields you want to include, Excel will guess where each field should be placed, and not always correctly.

1. In the PivotTable Field List task pane, drag the **Product** field from the top section to the **Row** Labels area at the bottom. (Figure 3)

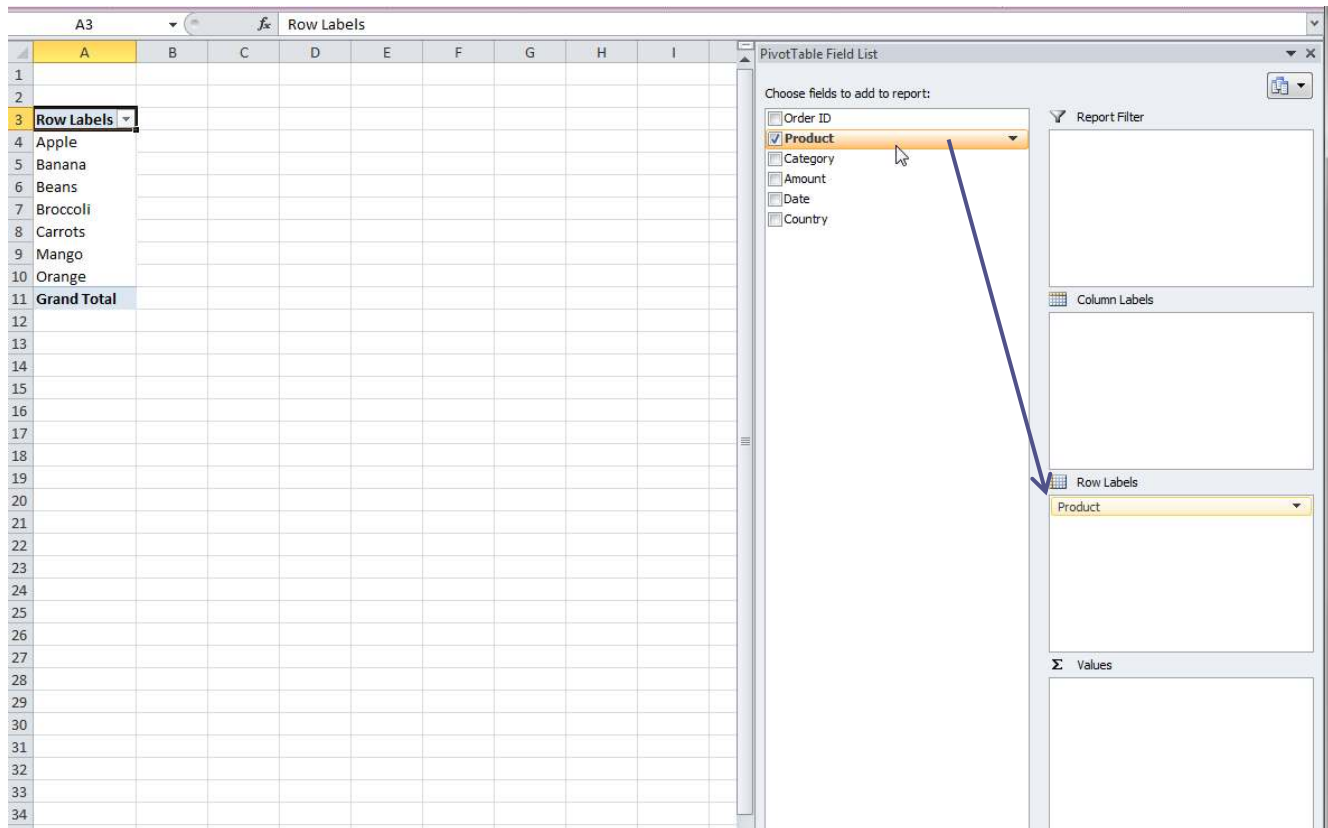


Figure 3

- Drag the **Country** field to the **Column Labels** area. The countries will appear across the top of the PivotTable, in a single row. (Figure 4)

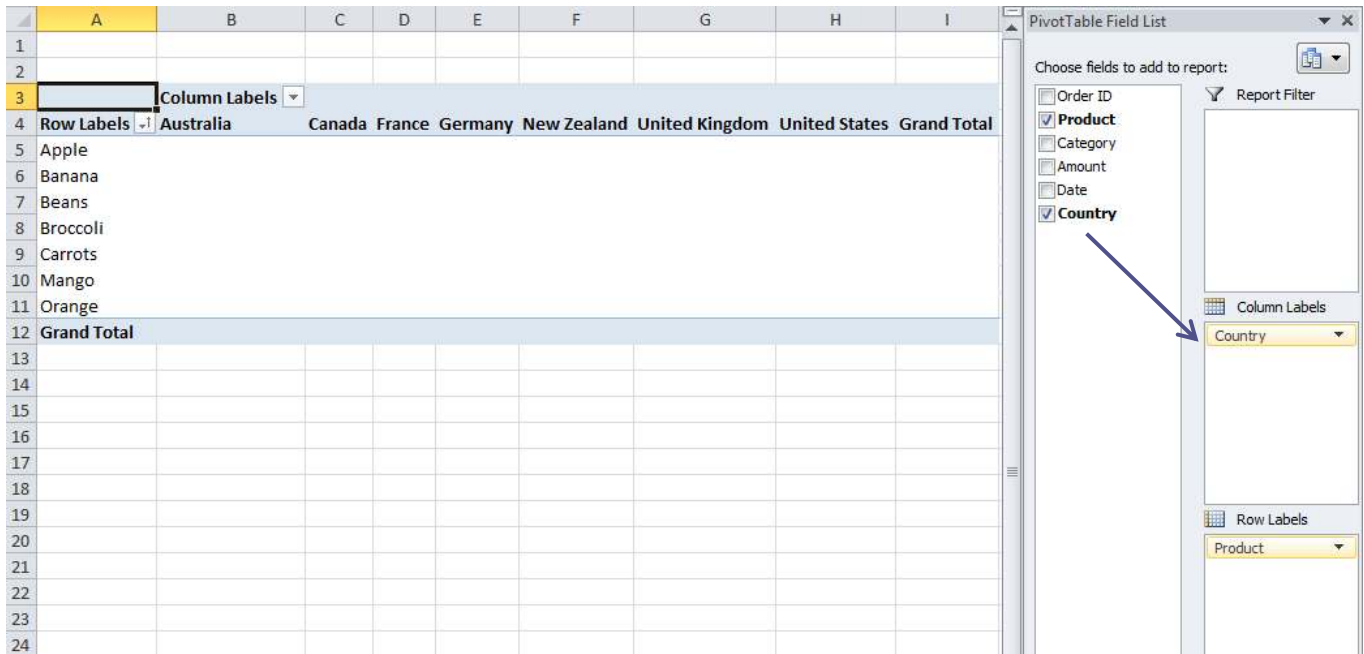


Figure 4

- Drag the **Amount** field to the **Values** area at the bottom.
 - The totals appear at the intersection of the row and column labels on the PivotTable. (Figure 5)

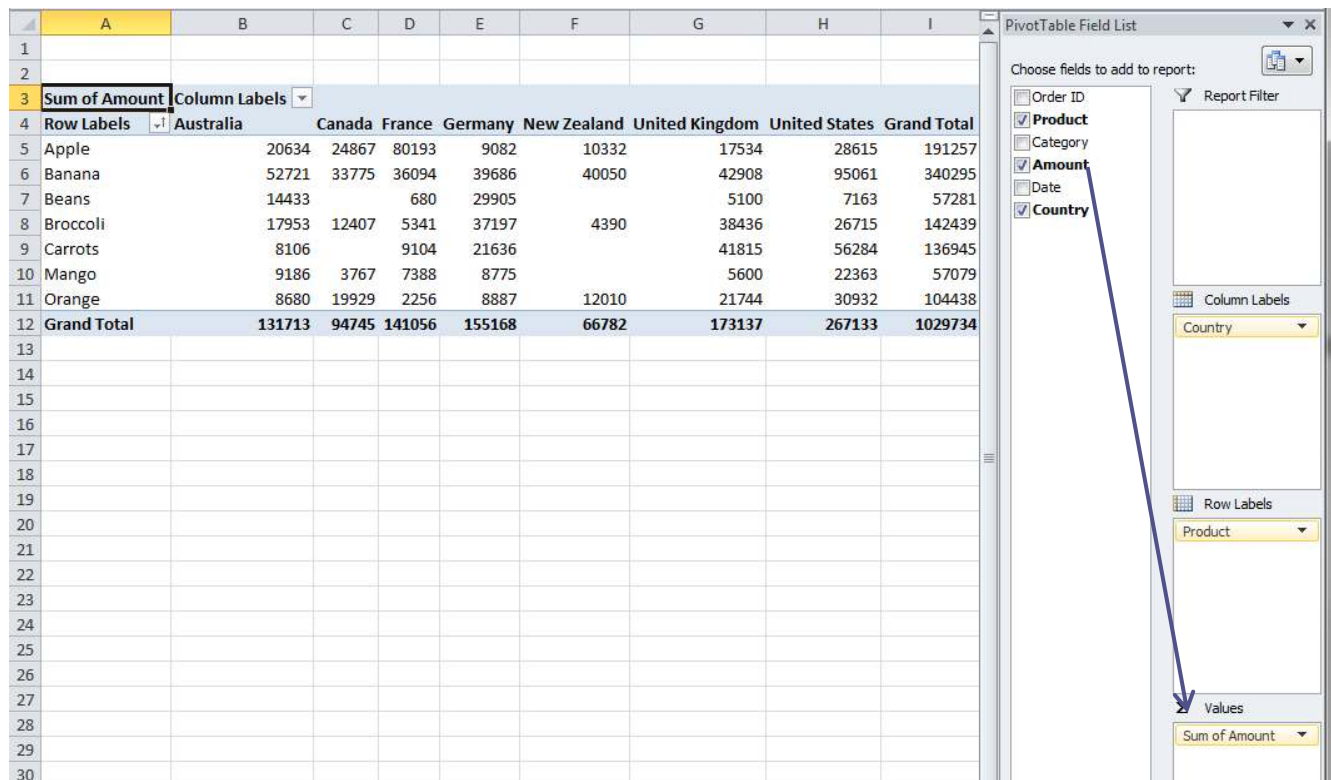


Figure 5

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