FastCourse Series

Excel Chapter 12: PivotTables and PivotCharts

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Learning Objectives

- After studying this chapter, you will be able to:
  - Create PivotTables
  - Modify and format PivotTables
  - Apply a filter to a PivotTable
  - Insert a slicer to filter a PivotTable
  - Create a calculated field
  - Create PivotCharts

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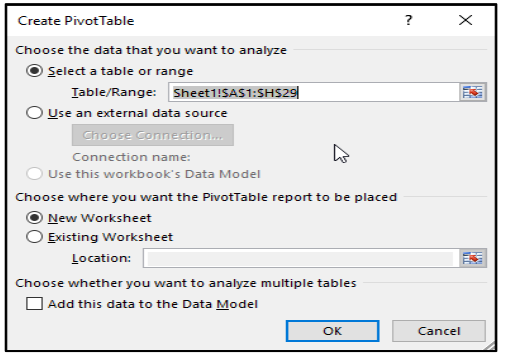
Creating PivotTables

- These are used for summarizing complex information.
- Making a PivotTable
  - PivotTables are based on an entire range.
  - Insert the PivotTable on the same or a separate worksheet.



  - Add fields for the row, column, and value areas of the PivotTable.

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What Is a PivotTable?

- This is a combination of a table and outline plus some unique features.
- To “pivot” is to turn or rotate, and PivotTables allow you to quickly switch between different views.

Row Labels	Sum of Product	Sum of Service
⊟ Sales Account Mgr	1,386,000	1,527,000
Darko	162,000	151,000
Eggles	340,000	700,000
Lemmon	210,000	340,000
Mandel	228,000	216,000
Tucker	446,000	120,000
⊞ Sales Rep	769,000	710,000
⊞ Senior Account Mgr	1,603,000	2,145,000
Grand Total	3,758,000	4,382,000

A PivotTable comparing product and service sales for employees, grouped by position

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Creating PivotTables (cont.)

- Arranging the Source Data
  - Source data is raw data and isn't summarized in any way.
  - Column headings (fields) appear across the top.
  - Rows contain unique entries.
  - No blank rows or columns or duplicate values are allowed.
- Remove Duplicates
  - Use the Remove Duplicates command.
  - You must specify which columns must match.

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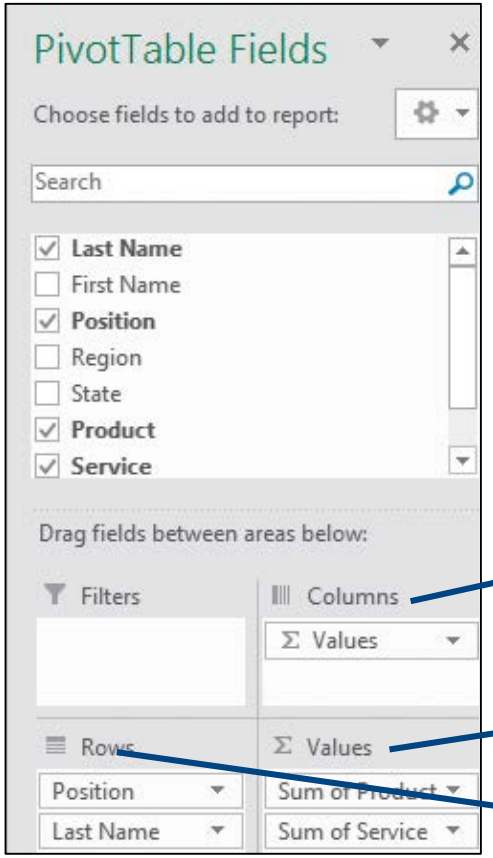
Adding PivotTable Fields

The PivotTables Fields pane allows you to add and remove fields easily.



Check field names to include in the PivotTable

Drag field(s) to become column header(s).

Drag field(s) to calculate.

Drag field(s) to become row header(s).

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Using PivotTables for Analysis

- You can modify at any time by adding/removing fields.
- You can change the positioning and order of fields.

Sum of Product	Column Labels			
Row Labels	Central	Eastern	Western	Grand Total
⊟ Sales Account Mgr	372000	228000	786000	1386000
Darko	162000			162000
Eggles			340000	340000
Lemmon	210000			210000
Mandel		228000		228000
Tucker			446000	446000
⊞ Sales Rep	350000	140000	279000	769000
⊞ Senior Account Mgr	234000	767000	602000	1603000
Grand Total	956000	1135000	1667000	3758000

Row Labels	Sum of Product
⊟ Central	956000
⊟ Sales Account Mgr	372000
Darko	162000
Lemmon	210000
⊞ Sales Rep	350000
⊞ Senior Account Mgr	234000
⊟ Eastern	1135000
⊟ Sales Account Mgr	228000
Mandel	228000
⊞ Sales Rep	140000
⊞ Senior Account Mgr	767000
⊟ Western	1667000
⊟ Sales Account Mgr	786000
Eggles	340000
Tucker	446000
⊞ Sales Rep	279000
⊞ Senior Account Mgr	602000
Grand Total	3758000

In these two PivotTables, the data is the same but is grouped in different ways.

NOTE! Arranging fields appropriately is the most important skill when working with PivotTables.

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Formatting PivotTables

- Format them to make information easier to read and understand.
- Choose styles from gallery on the Design tab.
- Choose from layout and style options.
- Change the number formatting.

Sum of Product		Region			
Position	Last Name	Central	Eastern	Western	Grand Total
⊟ Sales Account Mgr		$372,000	$228,000	$786,000	$1,386,000
	Darko	$162,000			$162,000
	Eggles			$340,000	$340,000
	Lemmon	$210,000			$210,000
	Mandel		$228,000		$228,000
	Tucker			$446,000	$446,000
⊞ Sales Rep		$350,000	$140,000	$279,000	$769,000
⊞ Senior Account Mgr		$234,000	$767,000	$602,000	$1,603,000
Grand Total		**$956,000**	**$1,135,000**	**$1,667,000**	**$3,758,000**

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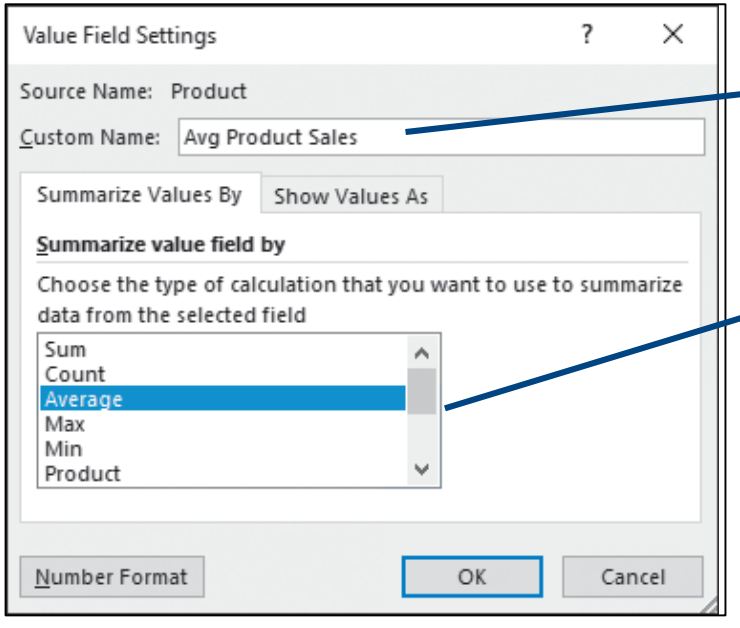
Changing Value Field Settings

- Change the settings of each value field to better tell the story of your data.



Customize the name.

Choose from a variety of functions.

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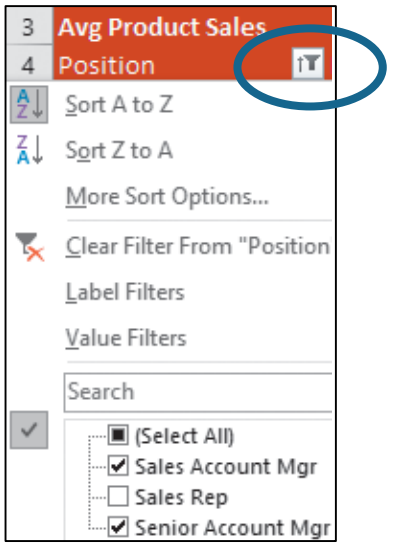
Filtering a PivotTable

- There are multiple ways to filter: AutoFilter, add a filter field, add a slicer.
- Totals and subtotals instantly recalculate after filtering.
- Filtering a PivotTable with AutoFilter



Avg Product Sales		Region		
Position	Last Name	Central	Eastern	Western
Sales Account Mgr		$186,000	$228,000	$393,000
	Darko	$162,000		
	Eggles			$340,000
	Lemmon	$210,000		
	Mandel		$228,000	
	Tucker			$446,000
Senior Account Mgr		$234,000	$383,500	$602,000
	Anderson			$602,000
	Cartman		$450,000	
	Louis	$234,000		
	Oster		$317,000	
Grand Total		$202,000	$331,667	$462,667

The AutoFilter button displays a menu with sorting and filtering options.

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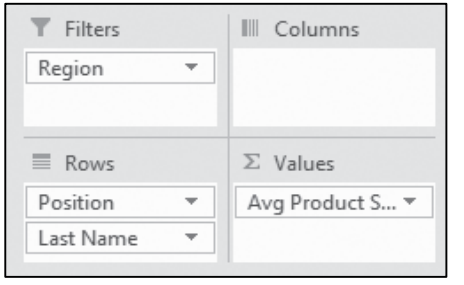
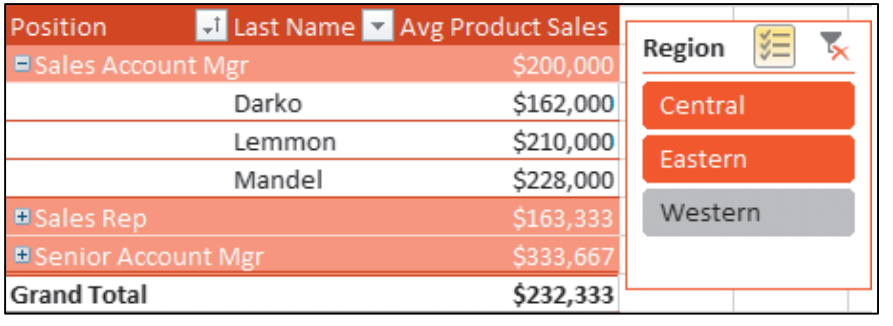
Filtering with a Filter Field and Slicers

- Adding a Filter Field
  - Drag a field to the Filters area.



- Filtering with Slicers
  - These are menu frames on a worksheet containing all filtering choices for one field.



Position	Last Name	Avg Product Sales
Sales Account Mgr		$200,000
	Darko	$162,000
	Lemmon	$210,000
	Mandel	$228,000
Sales Rep		$163,333
Senior Account Mgr		$333,667
Grand Total		$232,333

The selected items are highlighted in the slicer.

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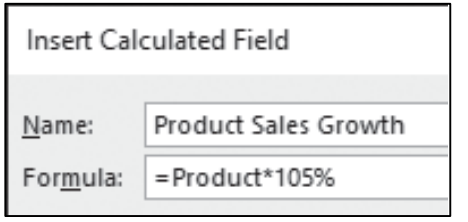
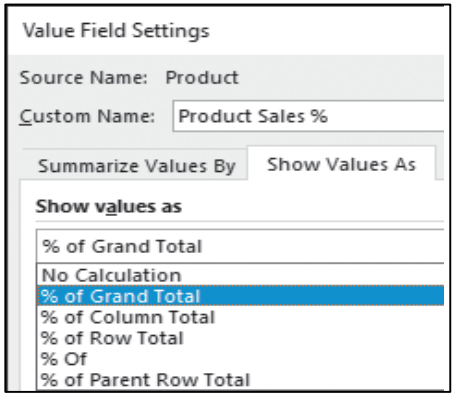
Creating Calculated Fields

- You can create your own calculations instead of using a function



- Show Values As
  - You can determine how values display by using comparison operations.



- Refreshing PivotTable Data
  - You must refresh a PivotTable after updates have been made to the data.
  - You can select an option to refresh upon opening the file.

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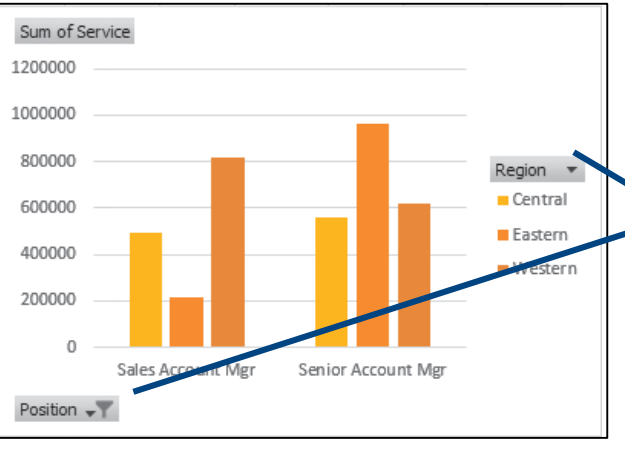
Creating PivotCharts

- These are based on PivotTable data.
  - The value area fields display as data series on the chart.
  - The row labels become axis labels.
  - The column labels become the chart legend.
- Filtering PivotCharts

Sum of Service	Region		
Position	Central	Eastern	Western
Sales Account Mgr	491000	216000	820000
Senior Account Mgr	560000	963000	622000
Grand Total	**1051000**	**1179000**	**1442000**



Row/Column label AutoFilter buttons

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