



FastCourse Series

Chapter 3: 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

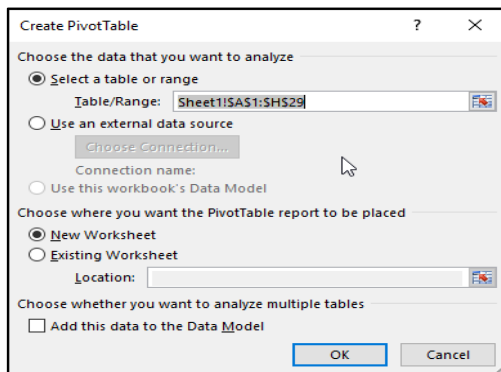
Creating Pivot Tables

- Used for summarizing information



Making a PivotTable

- ▲ PivotTables based on an entire range
- ▲ Locate PivotTable on same or separate worksheet



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



Creating Pivot Tables (cont.)

■ What is a PivotTable?

- ▲ Combination of a table and outline plus some unique features

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

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



Creating Pivot Tables (cont.)

■ Arranging the source data

- ▲ Source data is raw data, not summarized in any way
- ▲ Column headings (fields) appear across the top
- ▲ Rows contain unique entries
- ▲ No blank rows or columns or duplicate values allowed

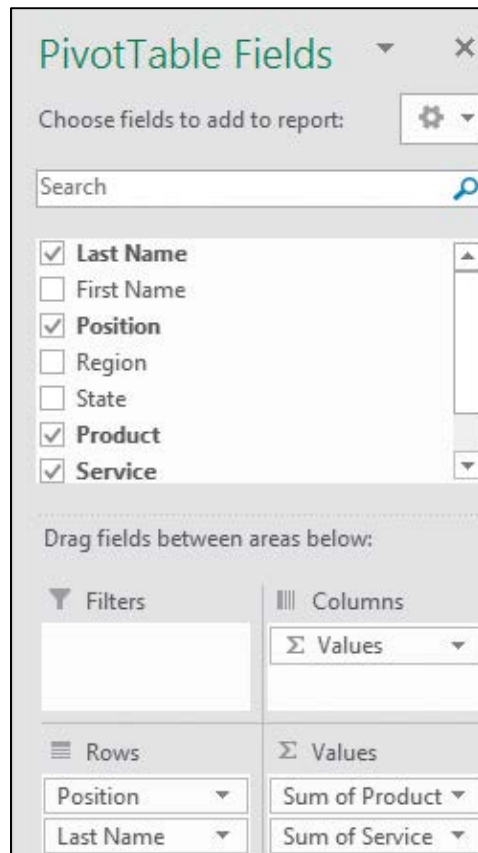
■ Remove duplicates

- ▲ Use Remove Duplicates command on Data tab



Creating Pivot Tables (cont.)

■ Adding PivotTable fields



Check field names to include in PivotTable

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

Drag field(s) to calculate

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

Working with PivotTables

- Add or remove fields
- Change 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
Egges				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
Egges		340000
Tucker		446000
[+] Sales Rep		279000
[+] Senior Account Mgr		602000
Grand Total		3758000

Same data, organized differently in PivotTable



Working with PivotTables (cont.)



■ Changing a PivotTable

- ▲ Check/uncheck fieldnames to add/remove fields
- ▲ Drag field(s) to/from different areas to pivot the table
- ▲ Drag field(s) to Filter area to enable filtering column(s)

	A	B	C	D
1	Position	Sales Rep		
2				
3	Sum of Amount	Column Labels		
4	Row Labels	Product	Service	Grand Total
5	Central	290000	350000	640000
6	Eastern	270000		270000
7	Western	316000	253000	569000
8	Grand Total	876000	603000	1479000

Filter button

Working with PivotTables (cont.)

■ Formatting PivotTables

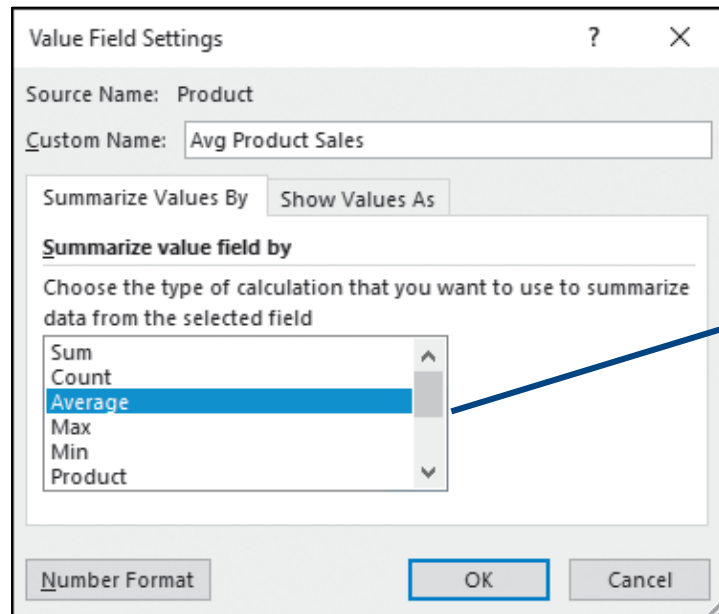
- ▲ Choose styles from gallery on Design tab
- ▲ Choose layout and style options
- ▲ Change number formatting

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
	Egges			\$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



Working with PivotTables (cont.)

■ Changing value field settings



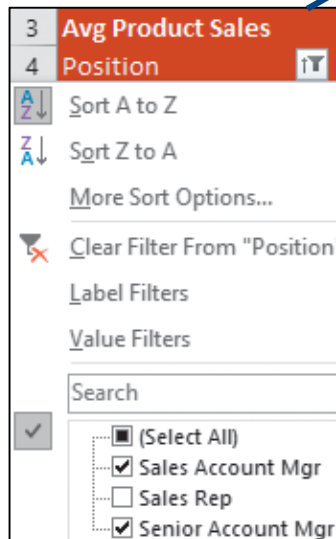
Customize name

Choose different function

Filtering a PivotTable

- Multiple ways to filter: AutoFilter, add a filter field, add a slicer
- Filtering a PivotTable with AutoFilter

AutoFilter button displays menu with sorting and filtering options

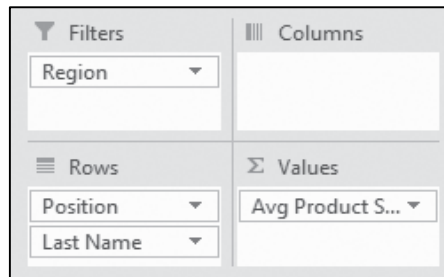


Avg Product Sales		Region		
Position	Last Name	Central	Eastern	Western
Sales Account Mgr		\$186,000	\$228,000	\$393,000
	Darko	\$162,000		
	Eggles			\$340,000
	Lemmon	\$210,000		
	Mandel		\$228,000	
	Tucker			\$446,000
Senior Account Mgr		\$234,000	\$383,500	\$602,000
	Anderson			\$602,000
	Cartman	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

Filtering a PivotTable (cont.)

■ Filtering a PivotTable with a filter field

▲ Drag a field to the Filters area



■ Filtering a PivotTable with slicers

▲ Menu frames on a worksheet with all filtering choices in 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

Region

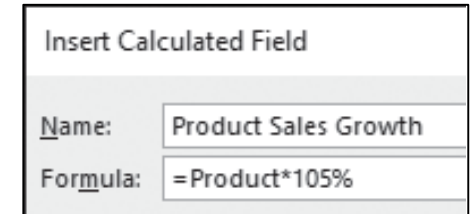
Central

Eastern

Western

Creating Calculated Fields

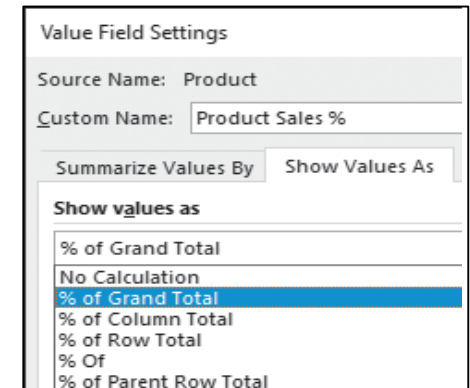
- Create own calculations instead of using a function
- Show Values As
 - ▲ Determine how values display by using comparison operations
- Refreshing PivotTable data
 - ▲ Must refresh PivotTable after updates have been made to the data
 - ▲ Option for refreshing upon opening file



Insert Calculated Field

Name: Product Sales Growth

Formula: =Product*105%



Value Field Settings

Source Name: Product

Custom Name: Product Sales %

Summarize Values By: Show Values As

Show values as

- % of Grand Total
- No Calculation
- % of Grand Total
- % of Column Total
- % of Row Total
- % Of
- % of Parent Row Total

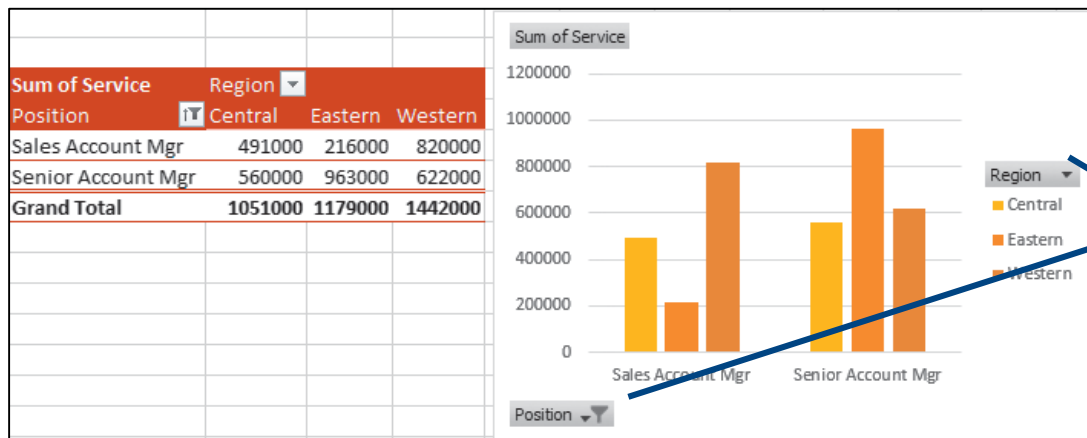


Creating PivotCharts

■ Based on PivotTable data

- ▲ Value area fields display as data series on the chart
- ▲ Row labels become axis labels
- ▲ Column labels become chart legend

■ Filtering PivotCharts



Row/Column label
AutoFilter buttons



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