PivotTable Preparation and Pointers

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Agenda

- PivotTable definition and uses
- Creating PivotTables
- Tips, Tweaks and Pointers
- Tool Box
  - Microsoft Excel
  - Data file

PivotTable

A PivotTable is a data processing tool used to query, organize and summarize data or information between spreadsheets, tables or databases. Dragging and dropping fields into a PivotTable facilitates rotational, or pivotal, structural changes.
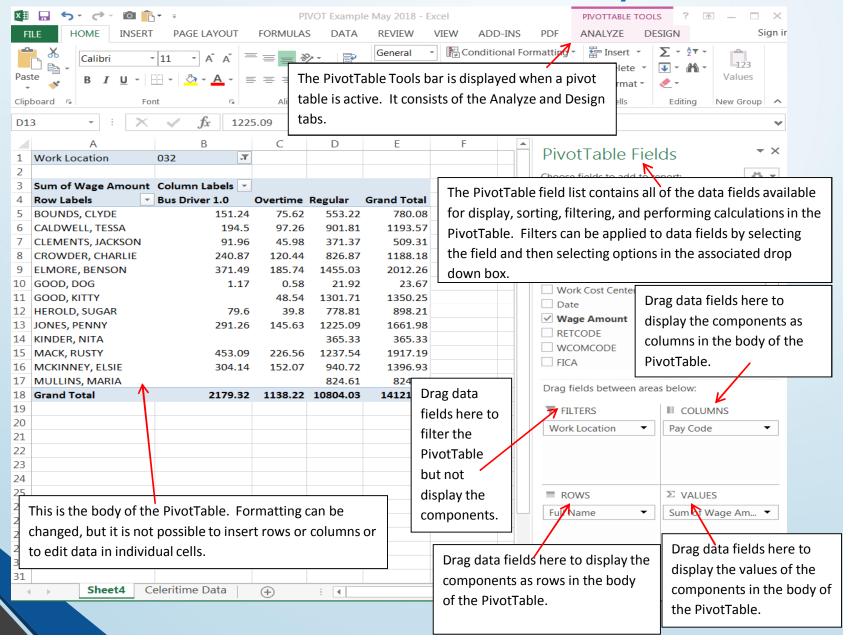
PivotTable Data

- Organize data in a table with rows and columns
- Assign headings to columns
- Cannot have empty rows or columns separating data
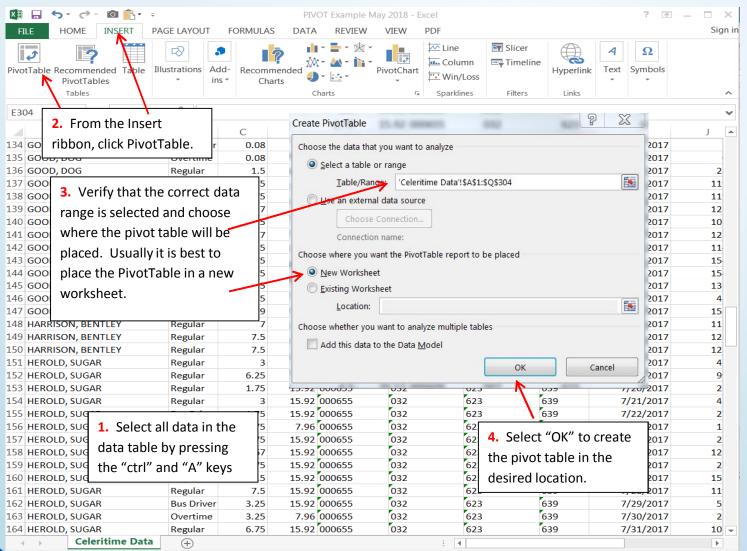- Do not include totals or subtotals in data table
- Pointer
  - To select all data in a table, hold down the Ctrl key and press the A key

PivotTable Anatomy

The PivotTable Tools bar is displayed when a pivot table is active. It consists of the Analyze and Design tabs.

The PivotTable field list contains all of the data fields available for display, sorting, filtering, and performing calculations in the PivotTable. Filters can be applied to data fields by selecting the field and then selecting options in the associated drop down box.

Drag data fields here to display the components as columns in the body of the PivotTable.

Drag data fields here to filter the PivotTable but not display the components.

This is the body of the PivotTable. Formatting can be changed, but it is not possible to insert rows or columns or to edit data in individual cells.

Drag data fields here to display the components as rows in the body of the PivotTable.

Drag data fields here to display the values of the components in the body of the PivotTable.

Row Labels	Bus Driver 1.0	Overtime	Regular	Grand Total
BOUNDS, CLYDE	151.24	75.62	553.22	780.08
CALDWELL, TESSA	194.5	97.26	901.81	1193.57
CLEMENTS, JACKSON	91.96	45.98	371.37	509.31
CROWDER, CHARLIE	240.87	120.44	826.87	1188.18
ELMORE, BENSON	371.49	185.74	1455.03	2012.26
GOOD, DOG	1.17	0.58	21.92	23.67
GOOD, KITTY		48.54	1301.71	1350.25
HEROLD, SUGAR	79.6	39.8	778.81	898.21
JONES, PENNY	291.26	145.63	1225.09	1661.98
KINDER, NITA			365.33	365.33
MACK, RUSTY	453.09	226.56	1237.54	1917.19
MCKINNEY, ELSIE	304.14	152.07	940.72	1396.93
MULLINS, MARIA			824.61	824
Grand Total	2179.32	1138.22	10804.03	14121

Work Location 032

Sum of Wage Amount   Column Labels

FILTERS — Work Location
COLUMNS — Pay Code
ROWS — Full Name
VALUES — Sum of Wage Am...

Creating a PivotTable

Create PivotTable

" Select all data in a data table

" On the Insert ribbon, click PivotTable

" Create PivotTable dialog box appears

- Verify that the data range is correct

- Choose where to place the PivotTable

  " Usually best to place PivotTable in a new worksheet to avoid data contamination

- Select "ok" and the PivotTable will be created in the selected location.

PivotTable Rows

" Determine which data field will be displayed as the rows in the PivotTable and drag that field to the "Row Labels" area of the PivotTable Field List

" To display sub rows for additional data field(s) under the primary row, drag the additional desired field(s) to the "Row Labels" area of the PivotTable Field List. The rows will display in the order that they appear in the "Row Labels" area.

PivotTable Columns

" Determine which data field will be displayed as the columns in the PivotTable and drag that field to the "Column Labels" area of the PivotTable Field List

" To display sub columns for additional data field(s) under the primary column, drag the additional desired field(s) to the "Column Labels" area of the PivotTable Field List. The columns will display in the order that they appear in the "Column Labels" area.

PivotTable Values

" Determine which data field will be displayed as the values in the PivotTable and drag that field to the "Values" area of the PivotTable Field List

" Values can be summarized in various ways such as sum, count or average. To change the way the value is displayed, right click the data field in the "Values" area, click "Value Field Settings" and select the desired calculation on the "Summarize value field by" tab.

PivotTable Filters

" Determine which data field(s) will be used to filter the PivotTable and drag the field(s) to the "Report Filter" area of the PivotTable Field List

  " Filters are used to limit the data displayed in the body of the PivotTable

  " Filtered fields are not displayed in the body of the PivotTable unless they are listed in an area of the PivotTable Field List other than the "Report Filter" area

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Pivot Table Filters

" To filter the items in a field, click on the drop down arrow for that field in the body of the PivotTable and make filter selections in the associated drop down box.

" Fields can also be filtered by selecting them in the PivotTable Field List

" Pointer

" Checking or unchecking "(Select All)" in the drop down box alternates between all or no items in the field filter. It is often easier to unselect all items and then individually select one or two items than to uncheck each undesired item.

Prevalent PivotTable Plights

" The PivotTable Field List disappeared. How do I get it back?

   " Click inside the body of the PivotTable

   " Right click in the body of the PivotTable and select "Show Field List"

   " Click the Field List Icon on the Analyze tab of the PivotTable Tools bar.

Prevalent PivotTable Plights

How can I change the headings in my PivotTable?

- Click the cell that contains the heading and type in the new heading.

- Another option is to hide the rows with the column headings and/or report filter items. Add headings or formatting to columns and rows outside the PivotTable. Remember that these additions are static and will not shift automatically if you add or remove filtered items from the PivotTable.

Prevalent PivotTable Plights

" My Pivot Table isn't pretty. How do I change the formatting?

  " Select the desired cell(s) and apply formatting just as you would with any Excel spreadsheet. While you cannot override the value in a PivotTable cell, it is possible to change the cell format.

  " Right click a cell in the desired field in the PivotTable and choose "Number Format". Select the desired format options. This will format the entire PivotTable field.

  " The "Design" tab of the PivotTable Tools bar has numerous options to format the entire PivotTable.

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Prevalent PivotTable Plights

" How do I change the sort order of the rows or columns?

- " Click the drop down arrow beside the row or column labels in the body of the PivotTable. Choose from the sort options at the top of the drop down box.
- " Right click on one of the data elements and select sort options.

Productive PivotTable Pointers

” Drill Down on Data Detail

  ” PivotTables allow you to drill down to the detailed data elements that make up the total of each PivotTable cell.

  ” Double click the desired cell. The detailed data will automatically be placed in a new worksheet within the workbook.

Productive PivotTable Pointers

" Add an additional value field to a PivotTable
   " Drag the selected field to the Values area.
      " Select the same field to express the data in a different format.
   " Right click the data field in the "Values" area, click "Value Field Settings" and select the desired calculation on the "Summarize value field by" tab.

PivotTable Practice

" PivotTable that shows the FICA cost by employee and work location for all dates except the month of February, 2017.

- " Drag "Full Name" field to Row Labels area
- " Drag "Work Location" field to Column Labels area
- " Drag "FICA" field to Values area
- " Drag "Date" field to Report Filter area
  - " In filter drop down, click "All" to choose all dates, then deselect February dates.

Questions