

# MS Office 2016 – Excel Pivot Tables - notes

## Introduction

Why You Should Use a Pivot Table:

- Organize your data by aggregating the rows into interesting and useful views.
- Calculate and sum data quickly.
- Great for finding typos.

## Create a Pivot Table

### Exercise # 1a - create a PivotTable

1. Open the file "PivotTableClass".
2. Click on the Sales tab – tab names are found on the bottom of the spreadsheet.
3. Select a range of data, including headers. (see Figure 1)
4. **Insert tab > PivotTable button** (most left side)
5. Click "OK" in the Create PivotTable dialog box. (see Figure 2)
6. Automatically directed to new sheet with PivotTable controls. (see Figure 3)

	A	B	C	D	E
1	Product	Price	Qty Sold	Total	Date
2	511115	\$283	135	\$38,205	1/3/2015
3	392219	\$172	77	\$13,244	1/3/2015
4	392219	\$305	112	\$34,160	1/3/2015
5	933592	\$729	193	\$140,697	1/3/2015
6	933592	\$688	9	\$5,292	1/27/2015
7	933592	\$699	28	\$16,772	1/27/2015
8	511115	\$10	156	\$1,560	1/27/2015
9	833987	\$54	42	\$2,268	1/30/2015
10	392219	\$527	124	\$65,348	1/30/2015
11	933592	\$224	186	\$41,664	1/30/2015
12	392219	\$776	142	\$110,192	2/6/2015
13	933592	\$69	49	\$3,381	2/6/2015
14	392219	\$381	32	\$12,192	2/6/2015
15	231771	\$75	25	\$1,875	2/6/2015
16	933592	\$635	120	\$76,200	2/6/2015
17	392219	\$332	96	\$31,872	2/13/2015
18	511115	\$411	166	\$68,226	2/13/2015
19	933592	\$641	166	\$106,406	2/13/2015
20	392219	\$616	131	\$80,696	2/13/2015
21	511115	\$734	143	\$104,962	2/13/2015
22	933592	\$783	43	\$33,669	2/26/2015
23	231771	\$438	125	\$54,750	2/26/2015
24	392219	\$283	106	\$29,998	2/26/2015
25	511115	\$52	82	\$4,264	2/26/2015
26	392219	\$114	198	\$22,572	3/20/2015
27	511115	\$425	80	\$34,000	3/20/2015
28	833987	\$794	150	\$119,100	3/20/2015
29	833987	\$140	113	\$15,820	3/20/2015

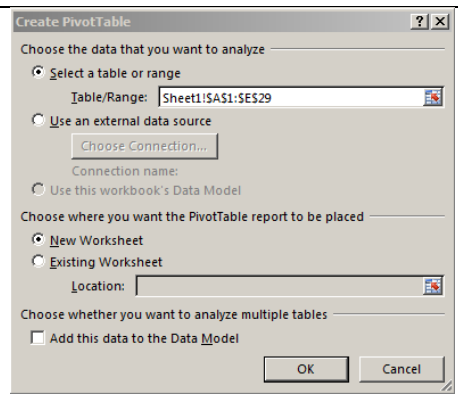


Figure 2- click OK

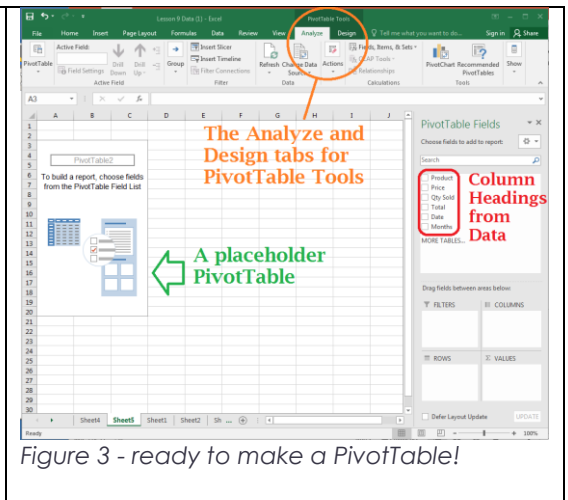


Figure 3 - ready to make a PivotTable!

	Jan	Feb	Mar	Grand Total
231771	150		150	
392219	313	507	198	1018
511115	291	391	80	762
833987	42	263	305	
933592	416	378	794	
<b>Grand Total</b>	<b>1062</b>	<b>1426</b>	<b>541</b>	<b>3029</b>

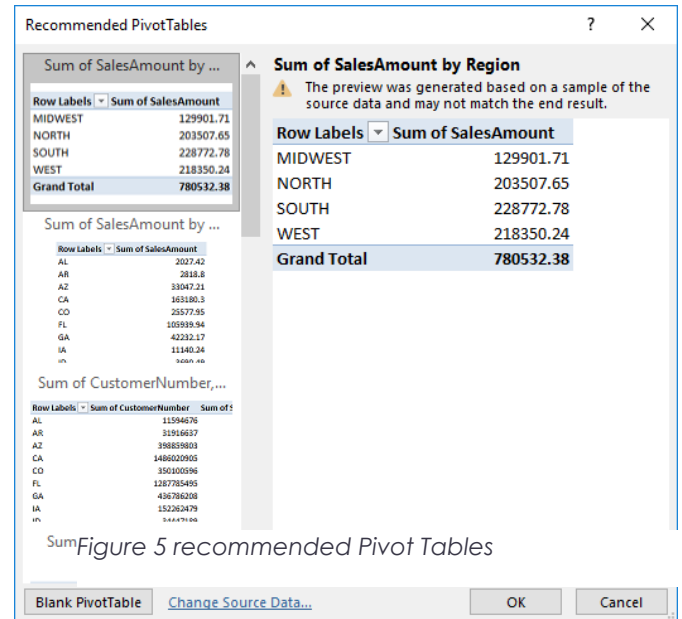
Figure 4 create first Pivot table

7. Drag and drop fields into Rows, Columns, and Values areas. A good way to start is: put text fields in the Rows field, and Dates in the Columns field. Put "numbers" in the value fields because Excel will Sum, Count, etc. the data.

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## Exercise #1b - create a Table, then a PivotTable

1. Click on **Make a Table** tab
2. Select columns A - E.
3. Insert > Table - or - **<ctrl t>**
4. Click "OK" on pop-up window because data has a header row.
5. Automatically directed to Table Tools
6. **Insert > PivotTable** Click "OK" on pop-up window
7. Automatically directed to new sheet, with PivotTable controls.



## Exercise #2 – play around

1. Select the BigData tab. **<Ctrl a>** to select all the data.
2. **Insert > Recommended PivotTables**
3. Look through the various possible ways to show the same data. Some of these will not make sense! Ex: summing the salesman numbers.
4. Click on one and see the different options.

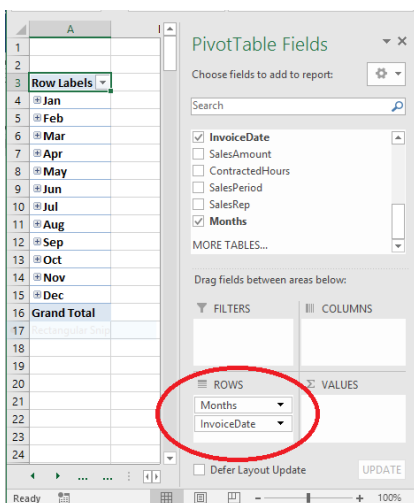


Figure 6 - handling dates

### Notes:

Excel 2016 does some **date handling** automatically. In a new Pivot Table, I dragged InvoiceDate to the Rows field, and Excel automatically included the Months field and summarizes by month. I can remove this if I really want to use the individual dates.

**Special formatting is lost.** Need to format dates, currency, etc in each pivot table.

Using a Table as input to a Pivot Table is preferred – every time you add a new row or column to the input data, the boundaries of a Table will automatically “see” the new data. When data change, refresh the cache by: **PivotTable Tools > Analyze > Data > Refresh**

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## Exercise #3 – Value Field and Sort

1. Using the BigData tab, create a new Pivot Table on a new page
2. Select Region and BranchNumbers for the rows
3. Select Sum Of Sales for the Values field **twice**.
4. On the drop down arrow of Sum of Sales, click on **Value Field** Settings.
5. Select Count.
6. Right click on any cell in the Count of Sales column.
7. Mouse down to **Sort**, and then mouse over to Sort Smallest to Largest and click.
8. Now all the data is sorted by Region / highest count of sales.

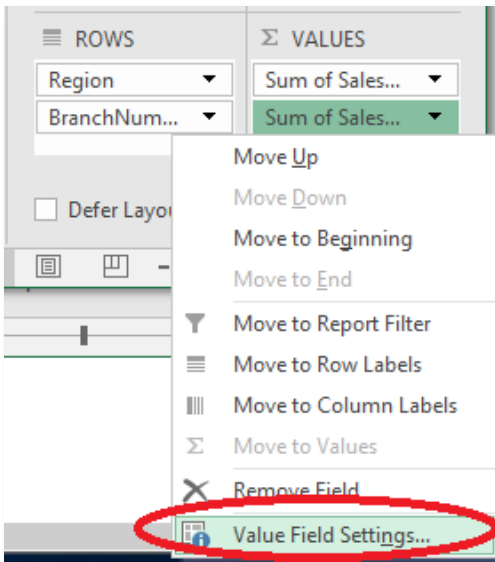


Figure 8 Value field Settings

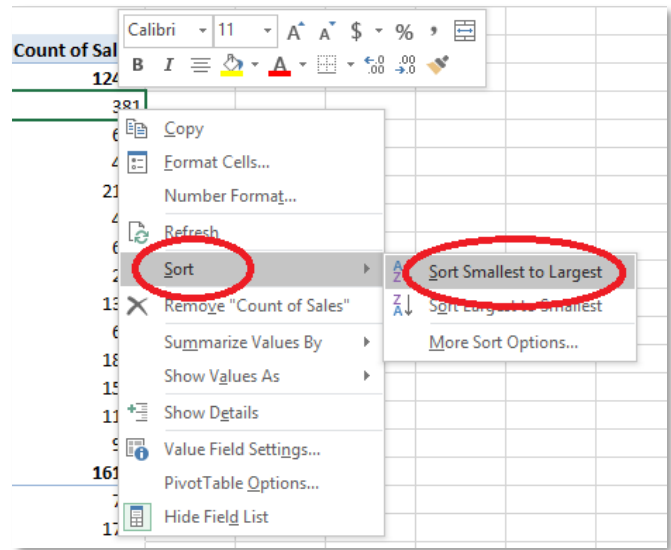


Figure 7 Sort by a Value field

## Exercise #4

1. Click on a BranchNumber cell (left click)
2. Hold down the shift key.
3. Click two or three other BranchNumber cells. They don't have to be touching each other.
4. Now click on **PivotTable Tools > Analyze > Group > Group Selection** button.
5. Repeat this process so all the BranchNumbers are in a group.
6. Now we can sort by Group Number
7. <http://bit.ly/2eKIOyF> to see more options.

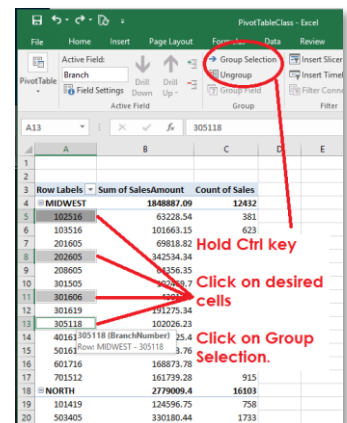
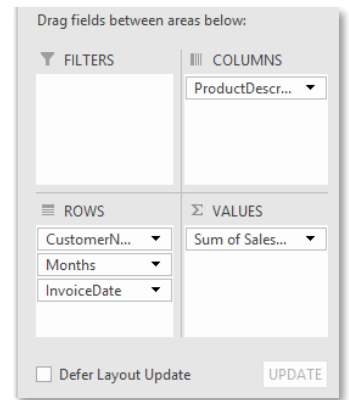


Figure 9 Group field

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## Exercise #4 – Slicers

1. Using the BigData tab, create a new Pivot Table on a new page. Use the layout in the example.
2. <Right Click> on the header row, Format Cells, click on the Alignment tab, and Orient the text -90 degrees.
3. Click on **PivotTable Tools > Analyze > Insert Slicer**. Check Region, Market, and BranchNumber. Three “slicers” appear on the report, and the Slicer Tools tab appears. More choices!
4. In the Slicer Tool tab, you can assign each slicer a color.
5. Click on “Midwest” in the Region Slicer. Now only data from the Midwest will show. Notice the other slicers only display data from the Midwest – Denver, Kansas City, and Tulsa.



Region	BranchNumber	Market
MIDWEST	102516	DENVER
NORTH	103516	KANSASCITY
SOUTH	201605	TULSA
WEST	202605	BUFFALO
	208605	CALIFORNIA
	301505	CANADA
	301606	CHARLOTTE
	301619	DALLAS

Slicers are a great way to create dashboards – a visual and interactive way to display your data.

## Exercise #5a – validate numbers

1. Using PivotTableClass.XLS, click on the **Validate** tab.
2. Look over the data and try to identify the errors. Now we'll let Excel do the work.
3. Select a cell in the top portion, say C8. Click Insert > PivotTable, and notice the green running dashes just go around A1 to D15. Why?
4. Select either column C, or cells C2:C19.
5. **Home > Conditional Formatting > Highlight Cells Rules > Less Than**. <click> mouse.
6. In the Less Than dialog box, enter a number, like .1, and choose a color that will identify bad numbers. (You can't sell a negative quantity of something.) Notice that “empty” cells are also identified.
7. Try simple formatting to see errors – <right click> on column D, click on Format Cells in the pop up window

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## Exercise #5b – make a PivotTable with bad data

1. Play around with the “bad data” file – create a PivotTable, putting Item in the Rows field, and Qty Sold in the Values field.
2. Note that it becomes “Count of Qty Sold”, and it counts how many rows have data.
3. Click on the drop down triangle in the Values field. Select **Value Field Settings**. Change it to **Sum**.

Sales Rep	Item	Qty Sold	Date
Harry	table	3	3/16/2016
Ginny	table	4	3/17/2016
Hermoine	chair	2	3/18/2016
Ron	lamp	4	3/19/2016
Albus	chair	3	3/20/2016
Minerva	lamp	5	3/21/2016
Bellatrix	chair	-1	3/22/2016
Harry	chair	3	2/3/2016
Ginny	table	4	2/4/2016
Hermoine	chair	4	2/5/2016
Ron	lamp	4	2/6/2016
Albus	chair	3	2/7/2016
Minerva	lamp	5	2/8/2016
Bellatrix	lamp	1	2/9/2016
Albus	toaste	99999	13/24/2016
Minerva	chair	3	1/23/2016
Peeves	rat	some	3/22/2005
Drako	chair	400	2/2/2016

Figure 10 - the bad data. I did a few charts with different data, pressing the "Refresh Data" button after each change.

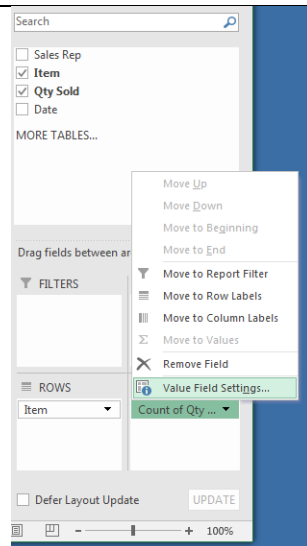


Figure 11 - change to "sum"

Row Labels	Average of Qty Sold
chair	52.125
lamp	3.8
rat	#DIV/0!
table	3.666666667
toaster	99999
<b>Grand Total</b>	<b>5908.588235</b>

Figure 12 - very unpredictable results.

Row Labels	Count of Qty Sold
chair	8
lamp	5
rat	1
table	3
toaster	1
(blank)	
<b>Grand Total</b>	<b>18</b>

Figure 13 - it counts the number of rows with data

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## Format a Pivot Table

### Rename tab

1. Double-click the working sheet tab for the PivotTable's sheet.
2. Type the new name.
3. Press Enter

### Adjust the column width

1. Select the column(s) that you want to change
2. On the Home tab, in the Cells group, click Format
3. Under Cell Size, click AutoFit Column Width.
4. Tip: to quickly autofit all columns on the worksheet, click the Select All button and then double-click any boundary between two column headings.

### Update number formatting

The PivotTable may not pick up formatting from the original data. It is necessary to re-format numbers.

1. Click on the down arrow next to the desired field in the Values section of the task pane (Lower right hand corner).
2. In the pop-menu, click Value Field settings... to bring up the Value Field Settings menu.
3. Click on Number Format (bottom left of pop up).
4. Apply formatting as in regular worksheet. Ex: Click on Number, change number of decimals. Or ex: click on Date and format mm/dd/yyyy. Click OK.

