Microsoft Excel Pivot Tables

Pivot tables allow you to view your data as a summary, allowing you to analyze and present your data in various formats.

- In this tutorial, you will learn how to build a Pivot Table, used for arranging and summarizing data from a spreadsheet.

Locating Pivot Table Functions

1. You will find the **Pivot Table** icons on a section of the **INSERT** tab ribbon. NOTE: Earlier versions of Excel housed the Pivot Table function on the **Data** tab.

(Continued next page)
Pivot Table Data

Pivot Tables can be developed from small or large samples of data. For this tutorial, you will use a table of data from a hypothetical shoe sales operation with three locations. There are 799 lines of data. Row 1 has column labels.

Rows 12 to 790 are currently hidden
Building a Pivot Table

2. Select a cell in the data table. Go to the INSERT tab and choose Pivot Table.
3. The **Create Pivot Table** wizard box will appear.
   a. The **Table/Range** will show your selected data/table.

The Pivot Table Wizard has selected the Table/Range as noted by the green dashed line that appears around the data.
b. Under **Choose where you want the Pivot Table report to be placed**, there is a choice between a **New Worksheet** or the **Existing Worksheet**. When choosing **Existing Worksheet**, you will need to identify the cell you want the Pivot Table location to begin. To do this, select **Existing Worksheet**, click your mouse in the cell in your workbook, and hit enter. You will see the cell address appear in the **Location** box. Click **OK**.

**NOTE:** Add this data to the **Data Model** allows you to include multiple tables of data in your analysis. This is an advanced function that is not covered in this tutorial.
4. The Pivot Table Fields wizard will appear. Here you will identify what data you want to be summarized in your Pivot Table by checking the fields you want to display or dragging and dropping the fields into the areas identified as columns, rows, and values.
a. Excel will create a pivot table for you when you place a checkmark in the fields you want to be displayed.

After placing a checkmark by Location and Total, Excel placed the fields automatically in Rows and Values. The Pivot Table above appears automatically.
b. If you want to rearrange the display, click on a field, hold down your left mouse button and drag to field to the location you desire.

The Pivot Table now displays both the Total sum and the Wholesale Price sum.
5. Values will show in a Pivot Table as a sum, if the data is numerical, and by count if the data is text. You can change the value display by selecting the field label you want changed. Click on the arrow to the right of the field name and select **Value Field Settings**. The **Value Field Settings** wizard will open. Choose the first tab called **Summarize Value By** and choose the summary you desire. In this example, you choose **Count**. Click **OK**. The new values now display in the Pivot Table.

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6. The **Show Values As** tab allows you to display the data in percentages or rankings. Click the arrow and a drop-down box will appear with choices. Here you select **% of Grand Total**. Click **OK**.

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7. If you add data to a table, you can refresh the Pivot Table to reflect the new data.

FINISH: After following the steps above, you can create a pivot table inside your Excel workbook.