

trivia

Only 10% of Excel users can create a pivot table

An extensive survey of Excel users suggested that only 10% of all Excel users are able to create a pivot table!

Lesson 5-1: Create a one dimensional pivot table report from a table

In this lesson, you'll jump straight into the deep end and create a simple one-dimensional pivot table. There's a huge amount to learn about pivot tables but it will be fun to do some useful work with one straight away.

Here's the sample file that you'll use in this lesson:

	A	B	C	D	E	F	G	H
1	Order No	Order Date	Customer	Employee	Title	Genre	Qty	Total
2	136438	01-Oct-12	Silver Screen Video	Lee, Frank	Lawrence of Arabia	Biography	15	122.76
3	136438	01-Oct-12	Silver Screen Video	Lee, Frank	The Discreet Charm of the Bourgeoisie	Comedy	9	67.46
4	136438	01-Oct-12	Silver Screen Video	Lee, Frank	Berlin Alexanderplatz	Drama	25	250.60
5	136438	01-Oct-12	Silver Screen Video	Lee, Frank	Gone With The Wind	Drama	14	107.72
6	136439	02-Oct-12	Cinefocus DVD	Diamond, Elizabeth	Mouchette	Drama	5	31.77

This is the type of worksheet that pivot tables can work well with because the columns contain repeating data.

The sample file contains over 2,000 rows of transactional data listing sales during the 18 month period from October 2012 to March 2014 inclusive.

You can see from the data that the worksheet contains details of orders sold by a DVD wholesaler, along with the titles supplied on each order. Order 136438 was placed on 1st-Oct-12 and was ordered by Silver Screen Video. The order was sold by Frank Lee and there were four items on the order. Two of the films ordered were in the Drama genre and the other two were in the Biography and Comedy genres.

A business may wish to ask several questions about sales during this period such as:

- What were my sales by *Genre*?
- How many units did each *Employee* sell?

In this lesson, you'll use a pivot table to answer both questions in less than 10 seconds!

1 Open *Transactions-1* from your sample files folder.

This worksheet contains a large table named *Data* (see sidebar for more on using tables with Pivot Tables).

The table looks like a regular range because it has had its *Filter* switched off and the *Table Style* set to *None*.

2 Click anywhere inside the table.

3 Click Insert→Tables→Pivot Table.

The *Create Pivot Table* dialog appears.

Notice that, because you clicked inside the table, it has automatically detected the table's name of *Data*.

important

Pivot Tables, Ranges, Named Ranges and Tables

You can create a Pivot Table that is associated with a *Range*, a *Named Range* or a *Table*.

In Excel 2013 it is best practice to always associate pivot tables with *Tables*.

Ranges and *Named Ranges* share a common problem. If rows are added to either, the PivotTable will not be aware of the added rows when it is refreshed.

Tables are wonderful to use as a data source for Pivot Tables because you can add and remove rows without affecting the integrity of the Pivot Table.

You learned everything there is to know about tables in: .

Transactions-1

note

You can also create a pivot table using Recommended PivotTables

Instead of creating your pivot table manually (as taught in this lesson), Excel can create a pivot table automatically from a template.

In this lesson you clicked:

Insert→Tables→Pivot Table

This created an empty pivot table.

You could also have clicked:

Insert→Tables→Recommended PivotTables

This option allows you to choose between several ready-made completed pivot tables.

You can also access the same *Recommended PivotTables* dialog using the *QuickAnalysis* button.



This button appears whenever you select a range. To open the Recommended PivotTables dialog you need to click:

Quick Analysis button→Tables→More

note

Activating a pivot table

Pivot tables are a little like charts in that you cannot work upon their design unless they are activated. To activate, you simply click anywhere inside the pivot table.

When the pivot table is activated, the *PivotTable Field List* appears along with the *PivotTable Tools* tab on the Ribbon.

- 4 Click the OK button.

An empty pivot table is shown on screen and the *PivotTable Field List* appears on the right of the screen.

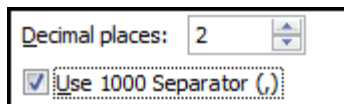
- 5 Check the *Genre*, *Qty* and *Total* check boxes (in that order) on the *PivotTable Field List*.

Simply by clicking on three fields you have answered the first question:

- What were my sales by *Genre*?

- 6 Format the values shown in column C of the pivot table so that they show two decimal places with a comma separator.

1. Right-click on any value in column C.
2. Click *Number Format...* on the shortcut menu.
3. Click *Number* in the *Category* list.
4. Click the *Use 1000 Separator* check box.



5. Click the OK button.

Row Labels	Sum of Qty	Sum of Total
Action	4699	37,411.40
Adventure	1149	8,588.03
Animation	574	5,098.87
Biography	2229	17,174.78
Comedy	4747	37,614.16
Crime	2960	25,212.68
Drama	8439	67,097.47
Fantasy	1252	11,785.28
Sci Fi	989	7,289.18
Thriller	765	5,514.95
Grand Total	27803	222,786.80

- 7 Clear all check boxes and then select the *Employee* and *Qty* check boxes.

Once again, with very little effort, you have answered the second question:

- How many units did each *Employee* sell?

- 8 Name the pivot table: *Transactions*.

1. Click inside the Pivot Table.
2. Click: PivotTable Tools→Analyze→PivotTable→PivotTable Name.
3. Type **Transactions** into the *PivotTable Name* box.

- 9 Name the pivot table worksheet tab: *Pivot Table*.



- 10 Save your work as *Transactions-2*.