# 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*.

# 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.
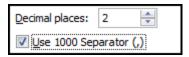
4  Click the OK button.

An empty pivot table is shown on screen and the *PivotTable Field List* appears on the right of the screen.
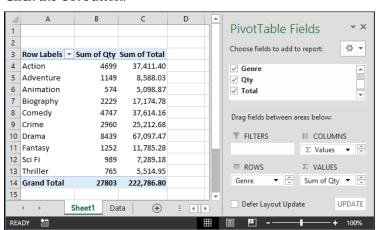
5  Check the *Genre*, *Qty* and *Total* check boxes (in that order) on the *PivotTable Field List*.

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.



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*.

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