Pivot Tables

Pivot Tables allow spreadsheet data to be summarised into reports similar to those created in database programs such as Microsoft Access and FileMaker Pro. Within the spreadsheet data the columns become the fields of the database and the rows become the individual records.

There are three types of fields (columns) in a Pivot Table:

Category Fields   which contain data that can be grouped together, for example, Departments of a business.

Data Fields   which contain numerical data on which calculations such as sum or average can be applied.

Arbitrary Fields   which contain general data that cannot be grouped or have calculations applied to it, for example, a person's first name.

Loading the Prepared Data

The sales data for a month for an online store that sells products over the internet has been prepared for you and summaries of the data are required.

1   Load Microsoft Excel or close the current file.

2   Click on the OPEN icon in the QUICK ACCESS TOOLBAR or from within the FILE tab or FILE menu.

3   Access the CHAPTER 20 folder of the EXCEL 2019 SUPPORT FILES and load the file:
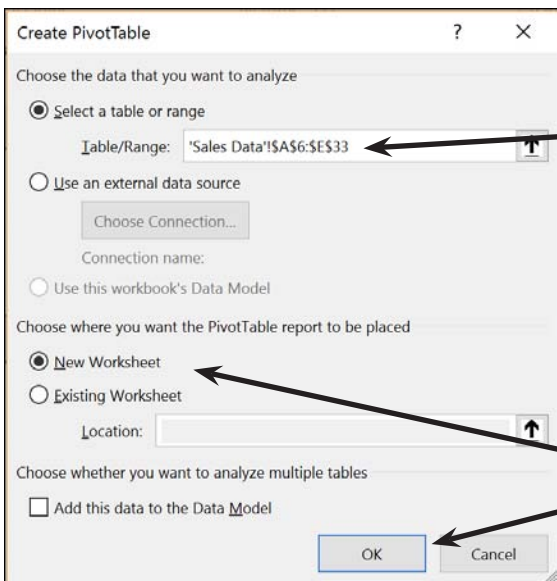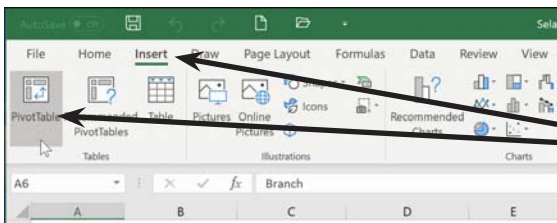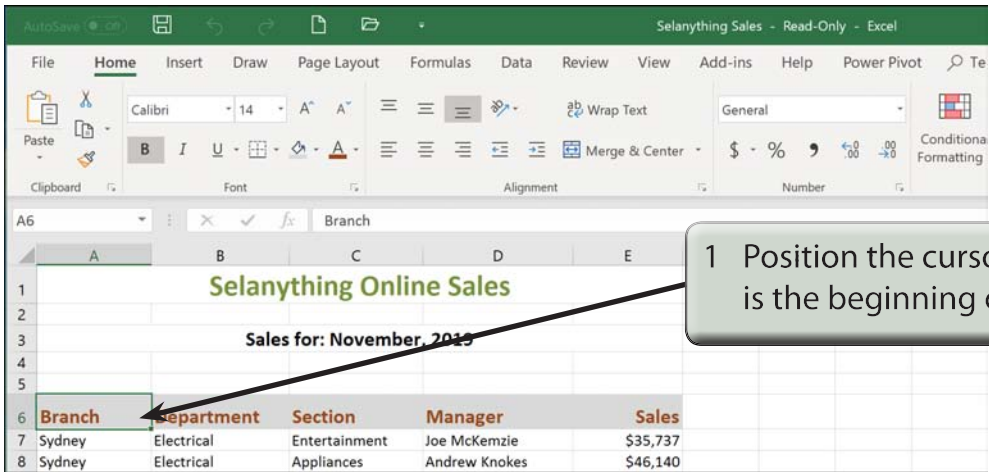
Selanything Sales

Selecting YES to the READ-ONLY dialogue box.

4   Look through the data to familiarise yourself with it. There are three Branches and, within each branch, there are 4 Departments with sections within each Department. The figures show the total sales for a month for each section.
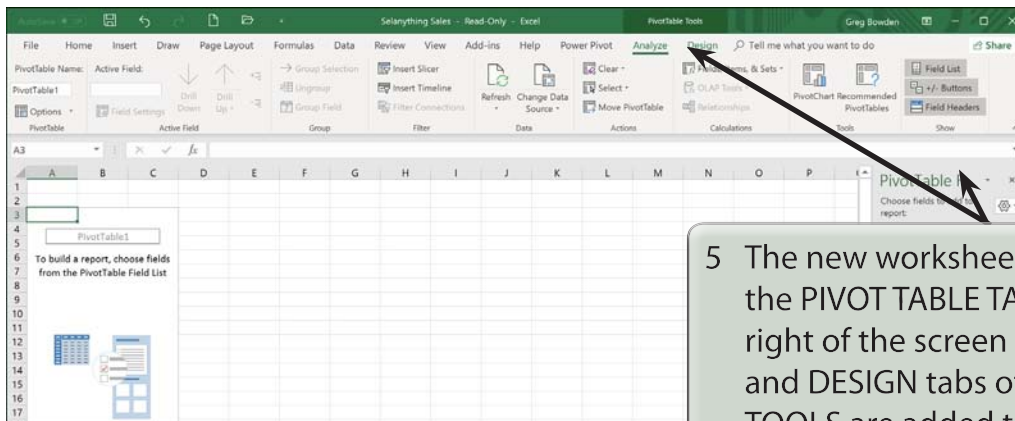
Creating a Pivot Table

A Pivot Table will be used to summarize the sales for the month.

A   Setting Up the Pivot Table

1 Position the cursor at cell A6 which is the beginning of the table.

2 Open the INSERT tab of the RIBBON and click on the PIVOT TABLE icon.

3 The CREATE PIVOT TABLE dialogue box is opened and the spreadsheet data starting from the selected cell is inserted in the TABLE RANGE box.

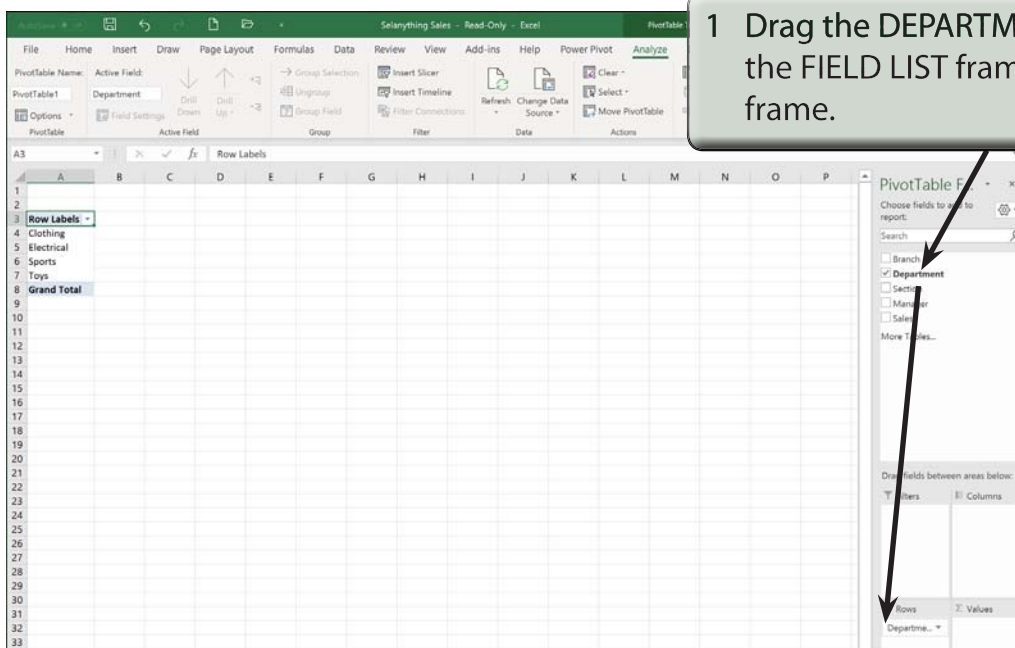4 Check that NEW WORKSHEET is selected and click on OK to create the Pivot Table in a separate worksheet.

NOTE: When setting up a spreadsheet that will have Pivot Tables created from it, it is best to have no blank rows or columns. If there are blank rows or columns, the Pivot Table wizard will only select the data up to the blank row or column.

5 The new worksheet is created with the PIVOT TABLE TASK PANE at the right of the screen and the ANALYZE and DESIGN tabs of the PIVOT TABLE TOOLS are added to the RIBBON.

B Inserting the Rows, Columns and Data

The Pivot Table is created by placing fields in the frames at the base of the PIVOT TABLE FIELDS pane. Let's set the Departments to be down the left of the report, the Branches across the top and the Sales to be the data within the Pivot Table.

1 Drag the DEPARTMENT field from the FIELD LIST frame into the ROWS frame.

2 Drag the BRANCH field from the FIELD LIST frame into the COLUMNS frame.

3 Drag the SALES field from the FIELD LIST frame into the VALUES frame.

4 The summary table is created showing the sales for each Department within each Branch and Grand Totals are provided for the DEPARTMENT and BRANCH sales.