

# Pivot Tables

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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 2016 SUPPORT FILES and load the file:

Selanything Sales

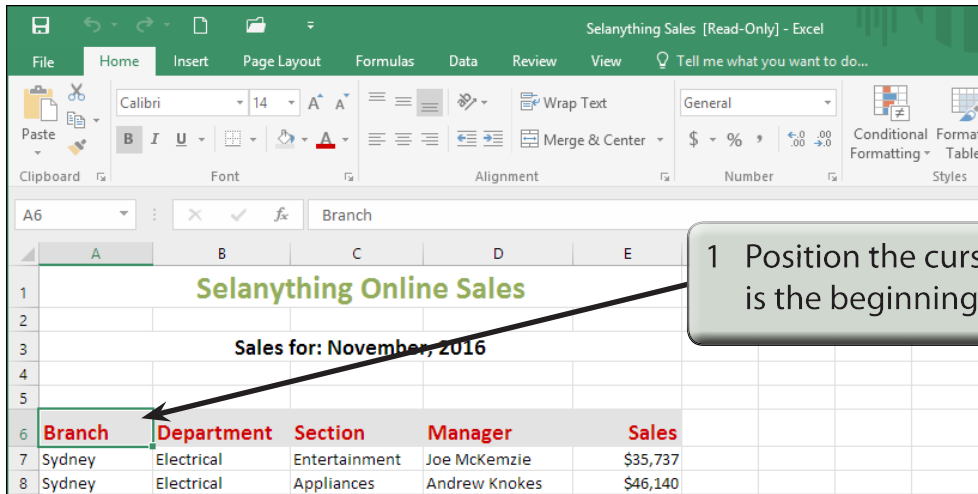
Selecting YES to the READ-ONLY dialogue box.

- 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.

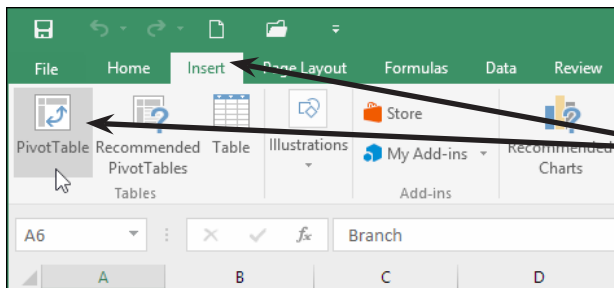
## Creating a Pivot Table

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

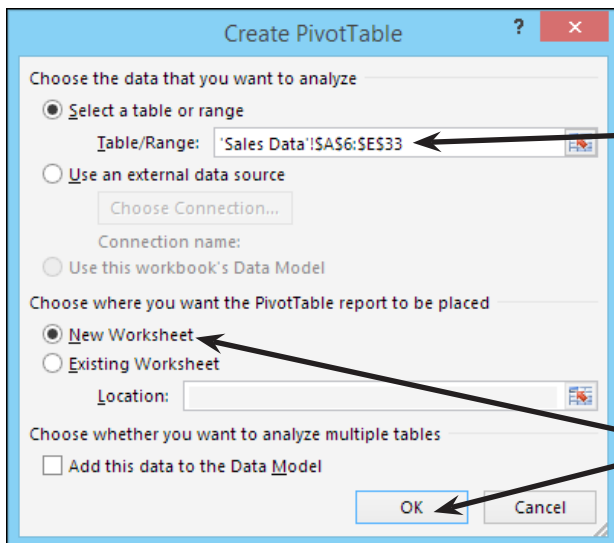
### A Setting Up the Pivot Table



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



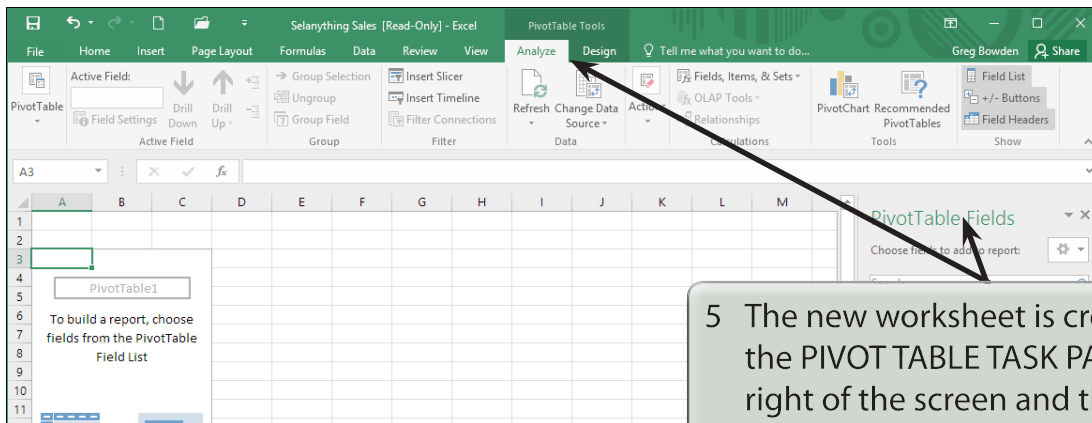
2 Open the INSERT tab of the RIBBON and click on the PIVOT TABLE icon.



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.

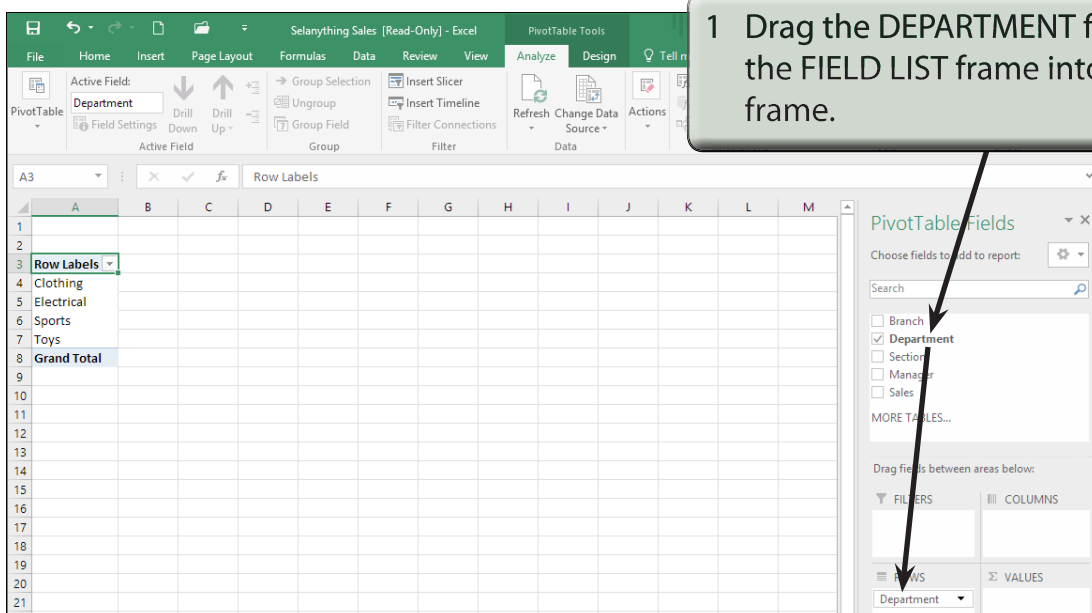
**NOTE:** When setting up a spreadsheet that will have Pivot Tables created from it, it is best to have no blank rows or columns. If there are blank rows or columns, the Pivot Table wizard will only select the data up to the blank row or column.



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.

The screenshot shows the PivotTable Fields task pane on the right side of the Excel window. The 'Branch' field is being dragged from the 'Choose fields to add to report' list into the 'COLUMNS' area. The 'Department' field is already in the 'ROWS' area. The main spreadsheet area shows a PivotTable with 'Branch' as column labels and 'Department' as row labels.

Column Labels	Brisbane	Melbourne	Sydney	Grand Total
Row Labels				
Clothing				
Electrical				
Sports				
Toys				
Grand Total				

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

The screenshot shows the PivotTable Fields task pane with the 'Sales' field being dragged into the 'VALUES' area. The 'Branch' field is in the 'COLUMNS' area and 'Department' is in the 'ROWS' area. The main spreadsheet area shows a completed PivotTable with 'Sum of Sales' as the value field.

Sum of Sales	Column Labels			
Row Labels	Brisbane	Melbourne	Sydney	Grand Total
Clothing	46735	46735	38507	131977
Electrical	72118	72118	81877	226113
Sports	56769	56769	52248	165786
Toys	15767	15767	14469	46003
Grand Total	191389	191389	187101	569879

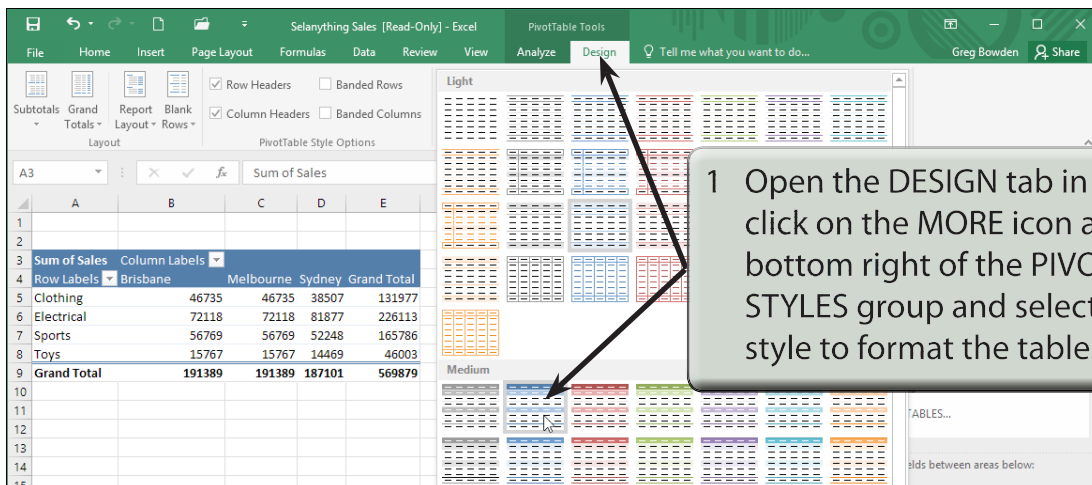
4 The summary table is created showing the sales for each Department within each Branch and Grand Totals are provided for the DEPARTMENT and BRANCH sales.

- NOTE:**
- i From the table you can quickly see the total sales for each Branch and the total sales for each Department.
  - ii If you drag a field into the wrong frame at the base of the FIELD LIST pane, simply drag the field back to the FIELD LIST frame and drag another field into the frame.

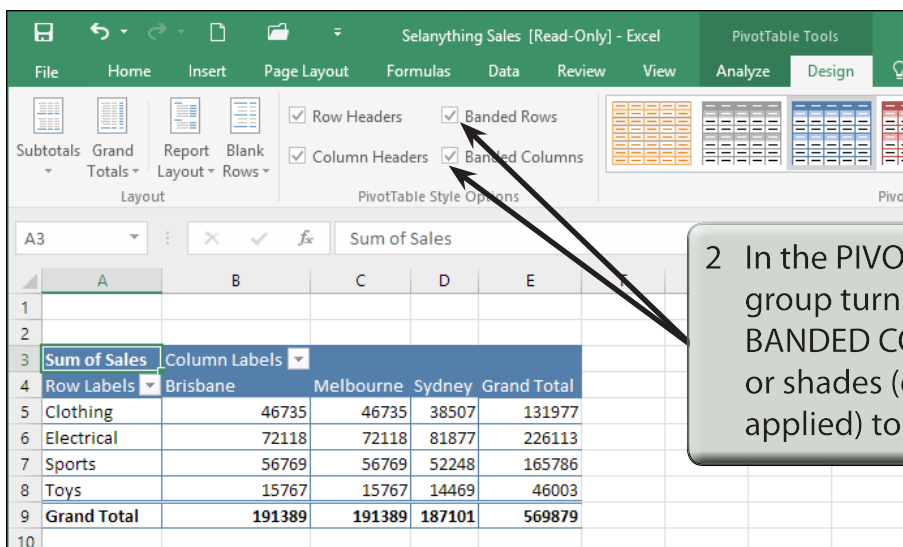
## Formatting Pivot Tables

The DESIGN tab of the PIVOT TABLE TOOLS and the HOME tab can be used to format the Pivot Table.

### A Pivot Table Styles



1 Open the DESIGN tab in the RIBBON, click on the MORE icon at the bottom right of the PIVOT TABLE STYLES group and select a MEDIUM style to format the table.



2 In the PIVOT TABLE STYLE OPTIONS group turn on BANDED ROWS and BANDED COLUMNS to add lines or shades (depending on the style applied) to the table.

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Row Labels	Brisbane	Melbourne	Sydney	Grand Total	
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Electrical	72118	72118	81877	226113	
Sports	56769	56769	52248	165786	
Toys	15767	15767	14469	46003	
<b>Grand Total</b>	<b>191389</b>	<b>191389</b>	<b>187101</b>	<b>569879</b>	