

Excel - Pivot Tables & Charts



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Introduction

PivotTables and the graphical representation of PivotTable data, known as PivotCharts, are both extremely powerful tools to analyze data in nearly infinite ways. For example, given a table of sales data, you could report on the following:

- Top categories by sales total
- Top categories by dollar total
- Top categories by region
- Sales of specific products by region
- Sales of specific products by category
- Items sold where they will
- And more

All of this can be done easily and in near real-time using PivotTables and PivotCharts. Data can even be moved to other locations, such as to an Access or SQL Server database. Once gathered and analyzed, this data can be shared with others in multiple ways throughout an organization.

This guide is an introduction to the PivotTable and PivotChart information in the *Charts* Excel - Advanced QuickStudy guide. As such, material will not be duplicated from that guide but rather will build on the material presented there. This guide will also only discuss Excel 2010, though much of the content and steps listed here apply to other versions as well.

NOTE: All the steps listed in this guide assume that your cursor is in the PivotTable where you start.

Common PivotTable Tasks

PivotTables provide a mechanism for taking sets of detailed data and summarizing it in two or three dimensions: rows, columns, and optionally, sheets. This feature is among the most powerful tools in Excel and makes data analysis fairly simple. It is important to note that the source data for all the examples and screen shots in this guide is listed here:

Layouts to Which to Use Them

There are three layouts in Excel: Compact, Outline, and Tabular. Each of these formats displays the data a little differently but offers views of the same same information. Many of the features of each view are the same, but the presentation is different. The following three sections have different options listed to their respective sections and show the three layouts.

Compact
Compact was introduced in Excel 2007 and has been the default view since. In this view, if there are multiple levels of data, Excel will collapse them into a single column or row in the source data here.

1. **Summarize all Values:** This will describe the function (total) and the field (summed Price) used to calculate all the numbers displayed.
2. **+ and - (Total):** The + sign is expand a category (total) may have subcategories that are also expanded) and the - sign to collapse it.
3. **Summarized Data:** Data is grouped by description, then by year, then by the quarter the data was made. All three of these levels are represented in a single column in this example, column A.
4. **Grand Totals:** The total of all data are placed in the last row and last column.
5. **Manual Filters:** The Manual Filter button  allows you to display or hide some of the columns. In this example, show or hide subcategories. By default, every category subcategory is filter is a separate column. The arrow beside the region Row Labels is also a manual filter for the rows and works in a similar fashion.
6. **Subtotals:** Data is summarized by description, then by year, then by the quarter the data was made. Subtotals are displayed on the top of the data (ROW) on the description or year line, but on the bottom of the data.

7. **PivotTable Field List:** Displays the fields in the table and allows fields to be added or removed by dragging and dropping them into the bottom of the page or between the boxes at the bottom. The order of fields can also be modified within each box (ROW, COLUMNS) or view different data relationships.

Outline

Outline layout places each field in a separate row or column. Data can be expanded or collapsed or will hide to any layout, but shows if all the data in the column is collapsed, the column will still be there (not blank). Notice also that this layout shows a manual filter drop-down arrow beside each field that can be filtered. Subtotals are at the top of the data, as they are in Compact layout. In this screen shot, repeated data was displayed (then Compact - Display in Outline to cells A2:A12). Instead of three cells being blank as they were in the Compact layout.

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David Cuillier, Charles N. Davis



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