

Excel 2010 Pivot Tables

Create a Pivot Table

	A	B	C	D	E	F	G	H	I	J
1	Date	Vendor	Amount	Budget	Object	Category	Vendor Code			
2	1/3/2010	Govconnection	\$ 113.22	31805	63050	Computer eq	17600	Betty James		
3	1/7/2010	Dell	\$ 344.94	50505	63616	Computer eq	17054	John Flowers		
4	1/8/2010	Govconnection	\$ 80.48	31803	63616	Network equ	16741	Joe Schmoe		
5	1/9/2010	HELLO DIRECT INC	\$ 286.94	31802	63040	Phone Equipr	17275	Phil Smith		
6	1/9/2010	Amazon	\$ 35.44	31805	63516	Network equ	17867	Pete Jones		
7	1/9/2010	SHI INTERNATIONAL CORP	\$ 25.00	50502	63610	Software	17452	Betty James		
8	1/12/2010	Staples	\$ 39.22	51001	63040	Supplies/Misc	17439	John Flowers		
9	1/12/2010	Belmont Springs	\$ 15.70	51001	63040	Supplies/Misc	16939	Jill Adams		
10	1/16/2010	SEAPORT HTL/WORLD TRA	\$ 535.00	31801	63040	Travel	18679	Joe Schmoe		
11	1/17/2010	SMARTSIGN	\$ 960.00	50501	64001	Supplies/Misc	16719	Phil Smith		

- Select a cell in your data range.
- On the Insert tab, select “PivotTable.”
- Default options are usually ok.
- Remember: No empty rows or columns.
- Every column must have a header: these become your field names.

Building your Pivot Table

The PivotTable Field list lets you drag fields into four areas.

The screenshot shows a pivot table with the following data:

	Budget	(All)	Jan	Feb	Mar	Apr	May	Grand Total	
63010			7.85	257.9	97.75	1010.64	327.29	1696.43	
63029					325			325	
63040			972.38	1173.14	1713.08	418.81		4277.41	
63050			113.22	30				143.22	
63060							225.24	225.24	
63201			517.83	182	132	551		2571.83	
63516			35.44					35.44	
63610			165.62		75			240.62	
63611						47.99		47.99	
63616			468.91	51.88	398.99			919.38	
64001			1185.84	1512.14	1542.12	970.47		5216.57	
64002						799.95		799.95	
Grand Total			3467.09	3207.06	5472.54	3798.86	547.53	16493.08	

The PivotTable Field List window is open on the right, showing fields available for dragging:

- Report Filter: Date
- Column Labels: Vendor
- Values: Amount, Budget, Object
- Row Labels: Category, Vendor Code

Report Filter creates a filter menu at the top of your page.

Column Labels drops the field into the column label section.

Row Labels drops the field into the row label section.

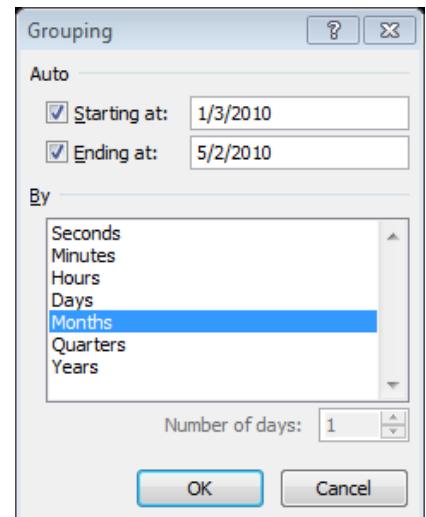
Values is the data of the table—you have many choices for what data gets computed: sums, counts, percentages, etc.

Every area can have multiple fields. If you “lose” your Field List window, click the Field List icon on the “Pivot Table” ribbon tab.

Grouping Data

You can group dates into months, quarters, and years.

Row Labels	Jan	Feb	Mar	Apr	May	Grand Total
63010		7.85	257.9			29 1696.43
63029						325
63040		972.38	1173.14			4277.41
63050		113.22	30			143.22
63060						24 225.24
63201		517.83	182			2571.83
63516		35.44				35.44
63610		165.62				240.62
63611						47.99
63616		468.91	51.88			919.38
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64002						799.95
Grand Total	3467.09	3207.06	53	16493.08		

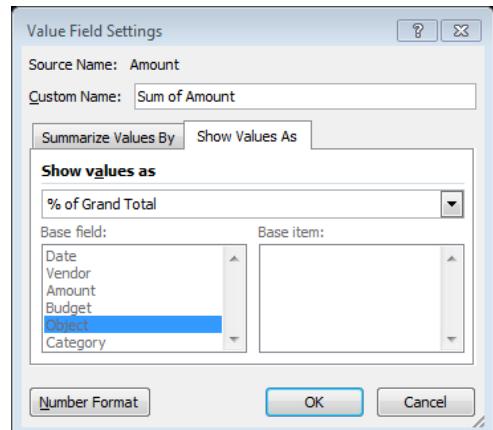


1. Right-click (or Control-click) on a date in your table.
2. Select Group and Outline → Group...
3. Select how you want things grouped. If you have multiple years, make sure that you select years as well as months—otherwise months from different years get grouped together. To select discontiguous items from the list use the Control key when you click.

Displaying Data as Percentages & Counts

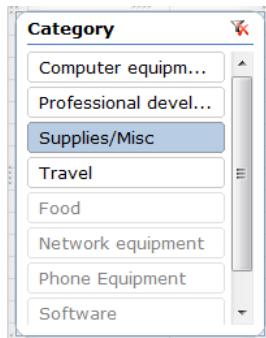
To display a count instead of a sum (or an average, product, etc.):

1. Click on the triangle next to your data field in the PivotTable Field List.
2. To change the operation (to Count, for instance), with the "Summarize Values By" tab active, select it from the list on the left.
3. To Select Percent, click on the "Show Values As" tab and then select "% of Grand Total" from the drop-down list.



Using Slicers

Slicers are an option for filtering your data.



1. From the PivotTable/Options tab select "Insert Slicer."
2. Check each field you want to create a slicer for.
3. Once you have a slicer you can select which data you want to show for that field type. For instance, you may only want to look at spending on Supplies/Misc.
4. To select more than one type of data to display you can use shift-click to select a contiguous range, or control-click to select a discontiguous range.