

Excel 2011 Pivot Tables

Create a Pivot Table

The screenshot shows the Microsoft Excel 2011 interface. The ribbon is visible at the top with the 'Data' tab selected. Below the ribbon, the 'PivotTable' icon in the 'Analysis' group is highlighted with a black box. The main area of the screen displays a data table with columns labeled Date, Vendor, Amount, Budget, Object, Category, Vendor Code, and Employee. The 'Amount' column is currently selected.

| | Date | Vendor | Amount | Budget | Object | Category | Vendor Code | Employee |
|---|--------|------------------------|-----------|--------|--------|---------------|-------------|--------------|
| 1 | 1/3/10 | Govconnection | \$ 113.22 | 31805 | 63050 | Computer equ | 18675 | Betty James |
| 2 | 1/7/10 | Dell | \$ 344.94 | 50505 | 63616 | Computer equ | 16239 | John Flowers |
| 4 | 1/8/10 | Govconnection | \$ 80.48 | 31803 | 63616 | Network equip | 17525 | Joe Schmoe |
| 5 | 1/9/10 | HELLO DIRECT INC | \$ 286.94 | 31802 | 63040 | Phone Eqlpm | 17679 | Phil Smith |
| 6 | 1/9/10 | Amazon | \$ 35.44 | 31805 | 63516 | Network equip | 16072 | Pete Jones |
| 7 | 1/9/10 | SHI INTERNATIONAL CORP | \$ 25.00 | 50502 | 63610 | Software | 16722 | Betty James |

- Select a cell in your data range.
- On the Data tab, select “Pivot Table.”
- 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 Pivot Table Builder lets you drag fields into four areas.

The screenshot shows the 'PivotTable Builder' window open over a data table. The window has several sections:

- Field name:** A list of fields checked: Date, Vendor, Amount, Budget, and Object.
- Report Filter:** A section containing 'Budget' and 'Date'.
- Column Labels:** A section containing 'Budget'.
- Row Labels:** A section containing 'Object'.
- Values:** A section containing 'Sum of Amount'.

Arrows point from the data table to each of these sections, indicating where specific fields are being placed.

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.

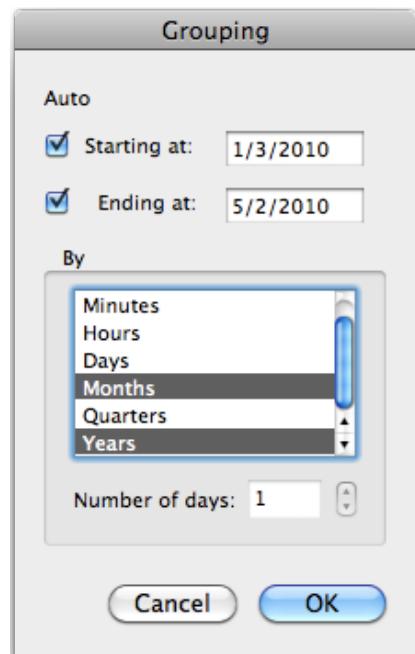
Values is the data of the table—you have many choices for what data gets computed: sums, counts, percentages, etc.

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

Grouping Data

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

A screenshot of a Microsoft Excel PivotTable. The table has 'Sum of Amount' as the column label and 'Row Labels' as the row label. The data shows monthly sales for various items. A context menu is open at the top of the table, with 'Group and Outline' and 'Group...' highlighted in blue. Other options in the menu include 'Format Cells...', 'Hide', 'Refresh Data', 'Select', 'Move', 'Field Settings', 'PivotTable Options', and 'Show Report Filter Pages...'. The background shows a blurred view of the PivotTable interface.



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 Command (or Apple) key when you click.

Displaying Data as Percentages & Counts

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

A screenshot of the 'PivotTable Builder' dialog box. In the 'Field name' section, 'Date', 'Vendor', 'Amount', 'Budget', and 'Object' are checked. In the 'Drag fields between areas' section, 'Budget' is in the 'Report Filter' area and 'Date' is in the 'Column Labels' area. In the 'Row Labels' area, 'Object' is listed. In the 'Values' area, 'Sum of A...' is listed. A large blue arrow points from the 'Date' field in the 'Column Labels' area down to the 'PivotTable Field' dialog box.

1. Click on the Info button next to your data field in the PivotTable Builder.
2. To change the operation (to Count, for instance), select it from the list on the left.
3. To Select Percent, click on Options and then select “Percent of Total” from the drop-down list.

