Excel 2011 Pivot Tables

Create a Pivot Table

• 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.

- **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.

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.):

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.