



Creating a Pivot Table From Scratch

OTS PUBLICATION: E16X • REVISED 2/23/2010 • TRAINING@TOWSON.EDU • OFFICE OF TECHNOLOGY SERVICES

=Shortcut =Advice =Caution

Introduction

In this self help document you will learn how to create a Pivot Table from scratch and understand the elements of the Pivot Table screen.

What is a Pivot Table?

A Pivot Table is a very powerful tool in Excel that enables a user to summarize and analyze data in lists and tables. The term "Pivot" means to alter the perspective of retrieved data. Once you have created a Pivot Table, you can manipulate the data to meet your analytical needs.

Setting Up Your Data

Before you can use a Pivot Table, make sure you set up the data correctly. There are a few rules you must follow:

- The **column headings** must be formatted differently than the data. For instance, the column headings in the figure below are bold (Fig 1, 1).
- The **data** below the column headings should be directly under the column headings. For best results, you should not skip a row (Fig 1, 2).
- The data within each column must be formatted the same. For example, in the salary field below, all the numbers are formatted as currency.

Figure 1

Last Name	First Name	Position	Department	Division	Date Hired	Salary
Foss	Larry	Admin. Assist.	Accounting	Copier	11/9/1996	\$31,888
Simpson	Sandrae	Technician	Engineering	Copier	3/1/1997	\$34,854
Mueller	Ursula	Accountant	Accounting	Copier	10/8/1996	\$36,101
Henders	Mark	Admin. Assist.	Accounting	Printer	6/5/1996	\$36,646
Hodge	Lisa	Admin. Assist.	Admin.	Copier	1/15/1997	\$37,081
Mueller	Kris	Admin. Assist.	Admin.	Fax	4/1/1997	\$37,081
Stewart	Randy	Admin. Assist.	Marketing	Fax	1/15/1997	\$37,081
Boughton	Frank	Admin. Assist.	Accounting	Fax	2/15/1997	\$37,598

Getting the Best Results

When creating a Pivot Table, you should "begin with the end in mind." Ask yourself:

1. What do you want as your new column heading?
2. What (if any) do you want as your row heading?
3. What data do you want to analyze?

Process Summary

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Inserting a Pivot Table

1. Place your **Active Cell Marker** (Fig 2, 1) on one cell by clicking inside the data range.
2. Select the **Insert** tab on the ribbon (Fig 2, 2).
3. From the **Tables** group, select the drop down arrow below the **Pivot Table** icon to insert a Pivot Table (Fig 3, 1).

Figure 2

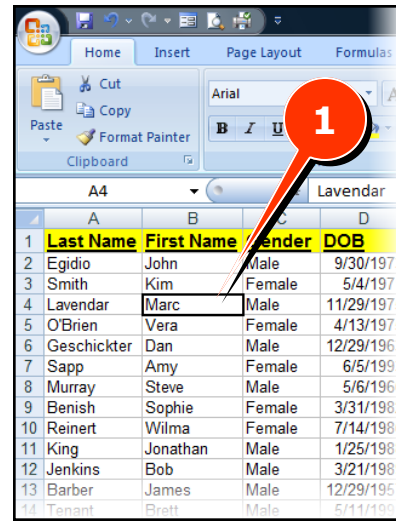
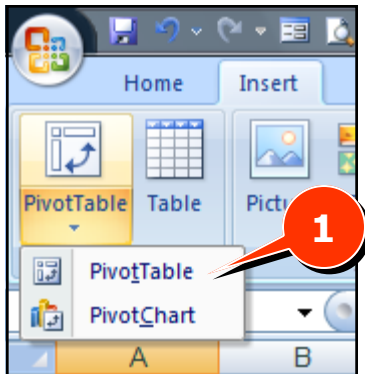


Figure 3



4. The **Create Pivot Table** dialog box appears (Fig 4). If this is your first time creating a Pivot Table, accept the default settings and click **OK** (Fig 4, 1).
5. The finished result appears on a new separate worksheet named **Sheet 1** (Fig 5, 1).

Figure 4

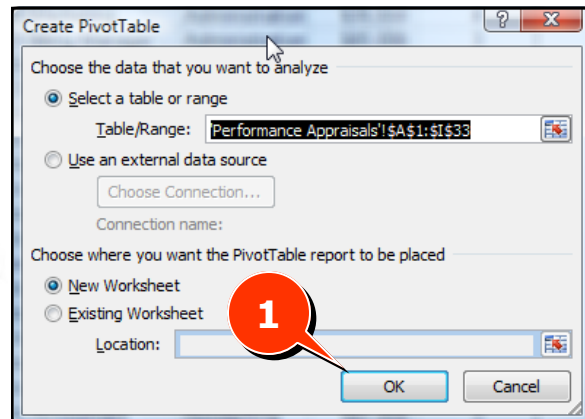
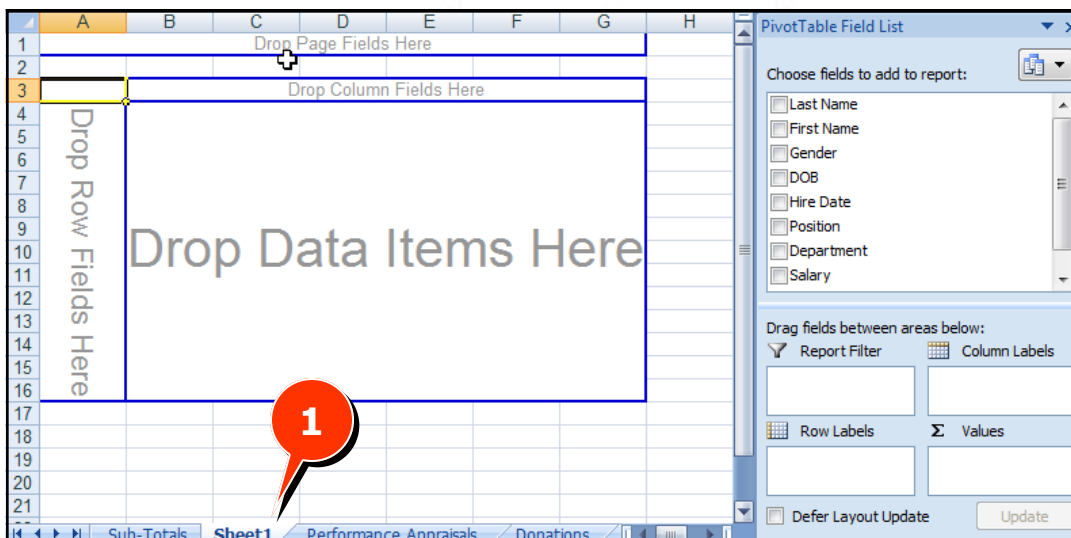
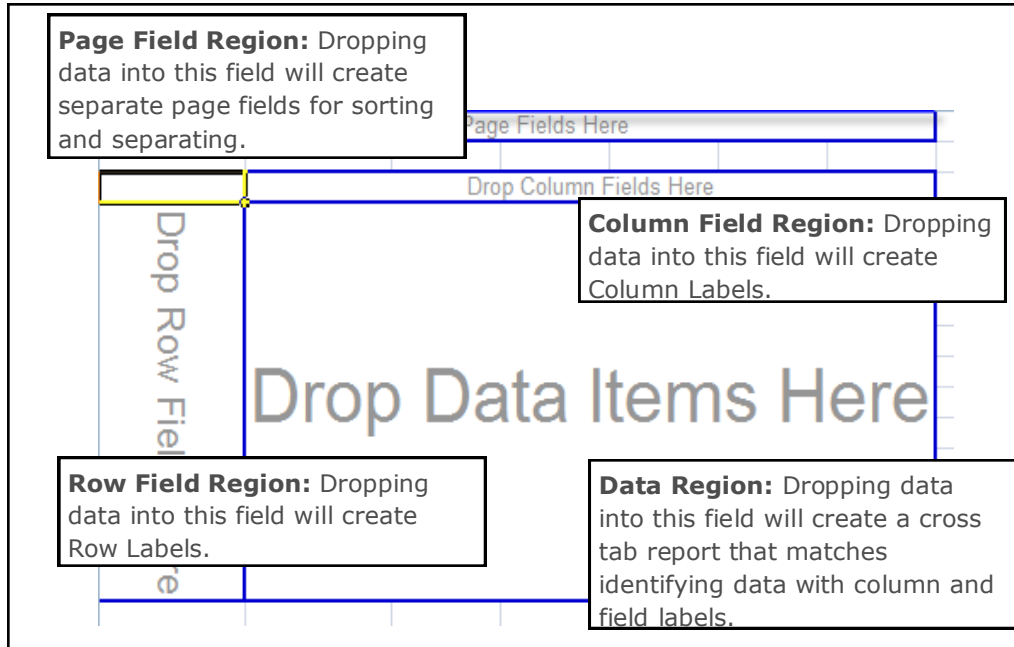


Figure 5



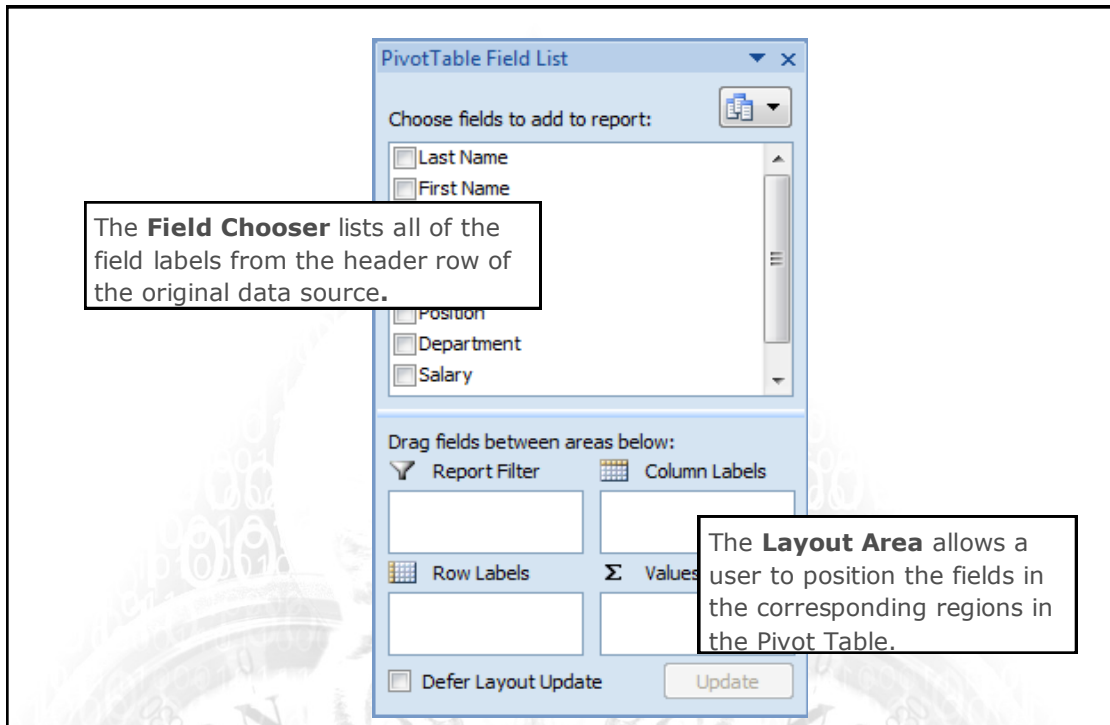
Pivot Table Screen Elements

The Pivot Table screen will look daunting at first. It is important to understand the key elements of a Pivot Table so that there is a better understanding of how to analyze data. In the figures listed below (Fig 6 & 7) you will see the main regions of table and



PivotTable Field List.

Figure 7



Analyzing Your Data

To make a Pivot Table analyze data, decide which items you want placed in the various regions.

For example, to analyze what the total income for each position is, based on performance rating, perform the following steps:

1. Click and drag the **Position** field (Fig 8, 1) down to the **Row Label** section of the **Layout Area** (Fig 8, 2).
2. The **Pivot Table** will immediately reflect the change in data (Fig 9).

Figure 8

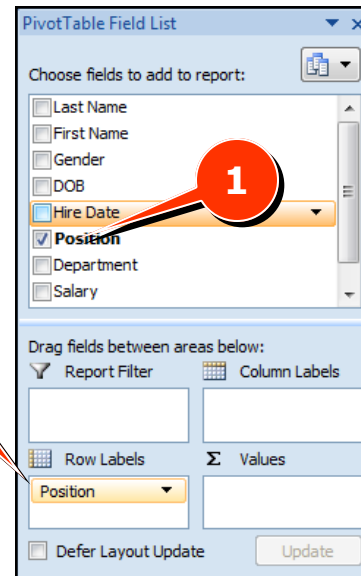
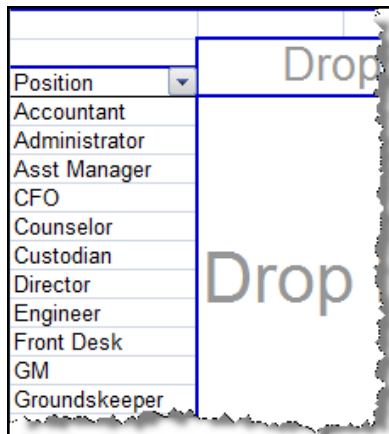


Figure 9



3. Continue the process by clicking and dragging the **"Performance Rating"** field down to the **Column Label** section of the **Layout Area**.
4. To complete the Pivot Table, click and drag the **"Salary"** field down to the **Value** section of the **Layout Area**.

5. The finished result will reflect the analyzed data (Fig 10).

Figure 10

	A	B	C	D	E	F	G
1	Drop Page Fields Here						
2							
3	Sum of Salary	Perf Rating					
4	Position	1	2	3	4	5	Grand Total
5	Accountant			47950			47950
6	Administrator					38750	38750
7	Asst Manager		55675				55675
8	CFO				96825		96825
9	Counselor		21960		22000	19500	63460
10	Custodian				36300		36300
11	Director				55000		55000
12	Engineer	49220					49220
13	Front Desk					40440	40440
14	GM				95000		95000
15	Groundskeeper		19200	22700	19355	23000	84255
16	Housekeeper			32940			32940
17	Kitchen Assistant				16650	18950	35600
18	Maintenance				19000		19000
19	Marketing				67550		67550
20	Mktg Manager						85000
21	Payroll						67090
22	President					157000	157000
23	Snr. Counselor				28950		28950
24	Supervisor			49750			49750
25	Trainer				35000		35000
26	VP				89000		89000
27	Grand Total	49220	96835	353380	532680	297640	1329755
28							

- ★ By default, Excel will automatically calculate values using the **SUM** function. To reflect a different function, click on the drop down arrow adjacent to the Field Name in the Layout Area and select **Value Field Settings**. (Fig 11, 1) from the menu.

Figure 11

