

How to use the powerful Pivot Table of Excel?

Pivot Table let you summarize and analyze your data. It is a powerful tool but it takes a couple of trials to master it. Once you get it, you will save plenty of time and impress with your data analysis.

1) Prepare your data

You can use Excel Lists, Databases, External Data. We will use in this example some data from an Excel sheet. Our purpose here will be to analyze the figures of a sales data sheet for multiple regions, multiple people, multiple products.

Make sure the list is well-organized Neatness counts! For example, make sure the first row of the list contains column labels, since Excel will use these data for the field names in the report. Also, make sure each column contains similar items - for example; include text in one column and numeric values in a separate column.

Remove all automatic totals The PivotTable report will calculate the subtotals and grand totals for you.

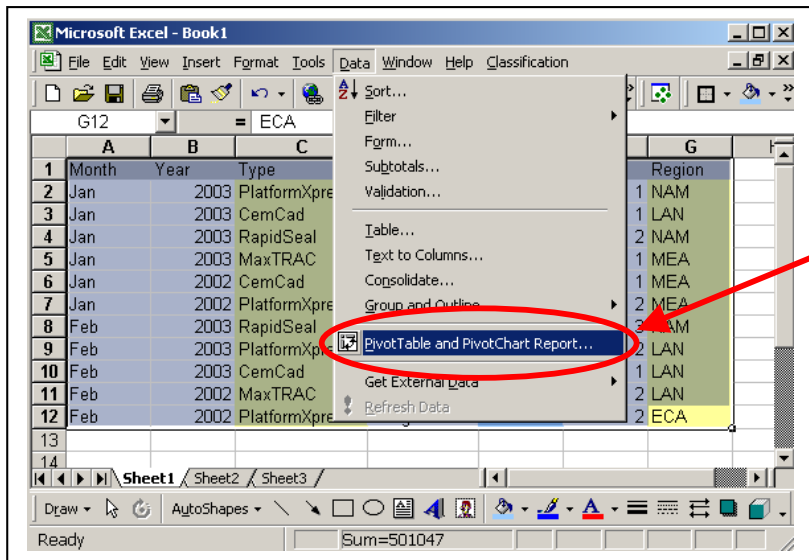
Do not use Autofilter, make sure that you view all the data

Data to Summarize (Sales Price)

	A	B	C	D	E	F	G
1	Month	Year	Type	Salesperson	Sales	Units	Region
2	Jan	2003	PlatformXpress	Doug	40000	1	NAM
3	Jan	2003	CemCad	Peter	25000	1	LAN
4	Jan	2003	RapidSeal	David	67000	2	NAM
5	Jan	2003	MaxTRAC	Peter	35000	1	MEA
6	Jan	2002	CemCad	Peter	30000	1	MEA
7	Jan	2002	PlatformXpress	Doug	40000	2	MEA
8	Feb	2003	RapidSeal	Boris	75000	3	NAM
9	Feb	2003	PlatformXpress	David	60000	2	LAN
10	Feb	2003	CemCad	David	27000	1	LAN
11	Feb	2002	MaxTRAC	David	35000	2	LAN
12	Feb	2002	PlatformXpress	Doug	45000	2	ECA

Categories of Data to analyze (Sales per Region and per Item)

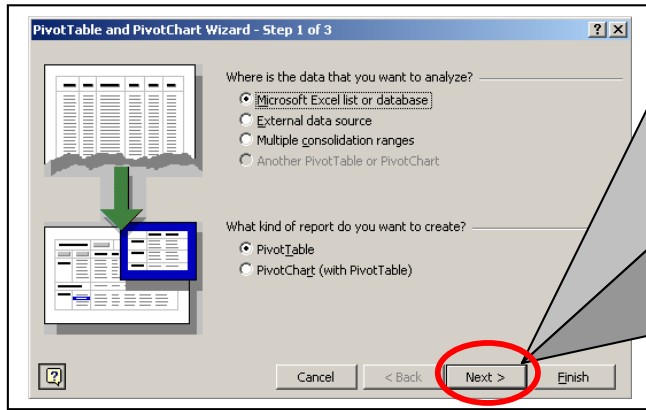
2) Create the Pivot Table



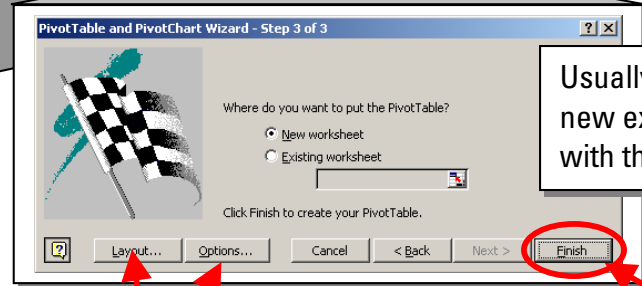
Attention !!! Pivot Tables may dramatically increase the size of your file !!!

- 1) Select the **entire table**
- 2) Click on **Data -> Pivot Table**

Note: The author would like to remind that all figures are fictive and that any similarity to an existing person would be pure coincidence.



If you have selected the entire table (or at least the data that you want, the Range is then correctly filled.



Usually we want a new excel sheet with the Pivot Table.

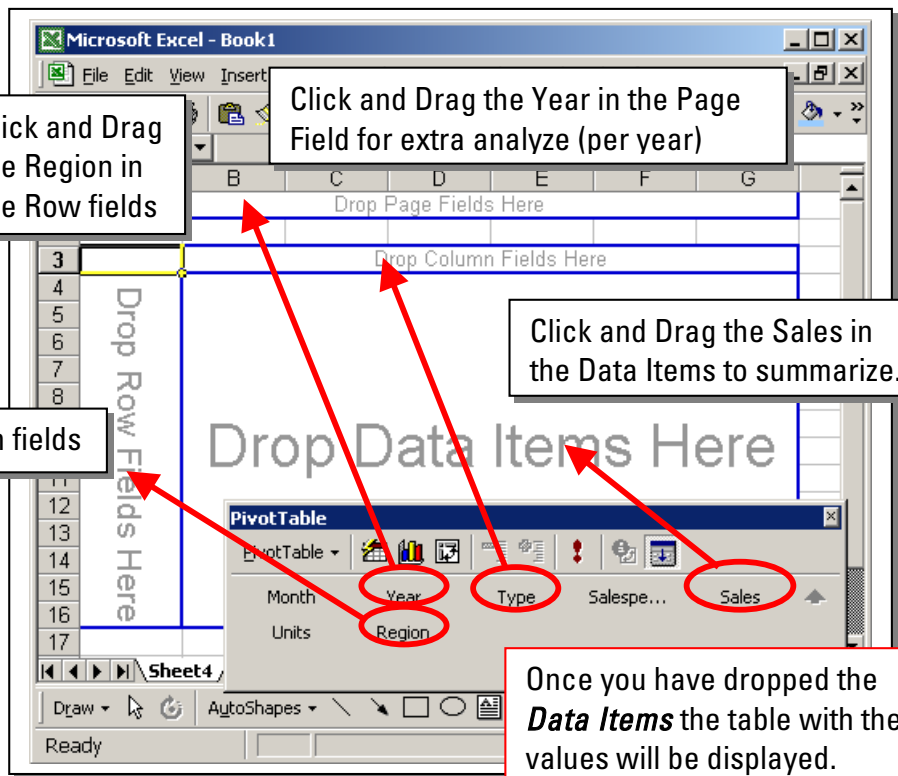
Most likely you can keep all defaults:

- You are using an Excel list
- You are doing a pivot table

Explore more options if you are confident now.

Click on Finish...

3) Finalize you Pivot Table



Click and Drag the Region in the Row fields

Click and Drag the Year in the Page Field for extra analyze (per year)

Click and Drag the Sales in the Data Items to summarize.

Click and Drag the Products in the Column fields

If you want to visualize only the data for the year 2003, then uncheck all the years except 2003

Once you have dropped the **Data Items** the table with the values will be displayed.

Drill down by region if you like, or remove products. Just select what

Here is your Summary

	A	B					
1	Year	(All)					
2							
3	Sum of Sales	Type					
4	Region	CemCad	MaxTRAC	PlatformXpress	RapidSeal	Grand Total	
5	ECA			45000		45000	
6	LAN	52000	35000	60000		147000	
7	MEA	30000	35000	40000		105000	
8	NAM			40000	142000	182000	
9	Grand Total	82000	70000	185000	142000	479000	