

## Pivot Table

### Purpose

Excel pivot tables are a great way of summarizing data that is in a database format (rows of data) into a rows-and-columns summary.

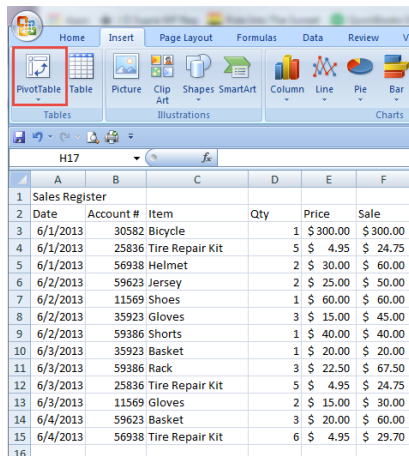
### Creating a Pivot Table

Data from, say, a Point of Sale system, is usually collected in rows of individual records. Here's an example:

Date	Account #	Item	Qty	Price	Sale
6/1/2013	30582	Bicycle	1	\$ 300.00	\$ 300.00
6/1/2013	25836	Tire Repair Kit	5	\$ 4.95	\$ 24.75
6/1/2013	56938	Helmet	2	\$ 30.00	\$ 60.00
6/2/2013	59623	Jersey	2	\$ 25.00	\$ 50.00
6/2/2013	11569	Shoes	1	\$ 60.00	\$ 60.00
6/2/2013	35923	Gloves	3	\$ 15.00	\$ 45.00
6/2/2013	59386	Shorts	1	\$ 40.00	\$ 40.00
6/3/2013	35923	Basket	1	\$ 20.00	\$ 20.00
6/3/2013	59386	Rack	3	\$ 22.50	\$ 67.50
6/3/2013	25836	Tire Repair Kit	5	\$ 4.95	\$ 24.75
6/3/2013	11569	Gloves	2	\$ 15.00	\$ 30.00
6/4/2013	59623	Basket	3	\$ 20.00	\$ 60.00
6/4/2013	56938	Tire Repair Kit	6	\$ 4.95	\$ 29.70

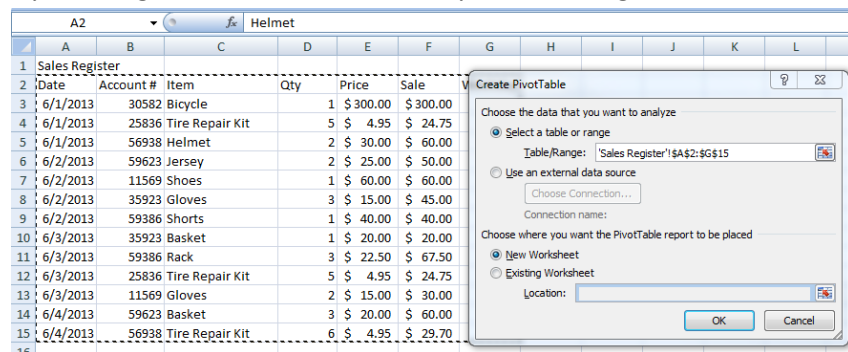
To summarize this by date and item, you can create a pivot table:

1. Place your cursor inside the table of data—this will let the pivot table function automatically select the field of data.
2. Select the "Insert" tab at the top of the Excel screen, then the "Pivot Table" icon

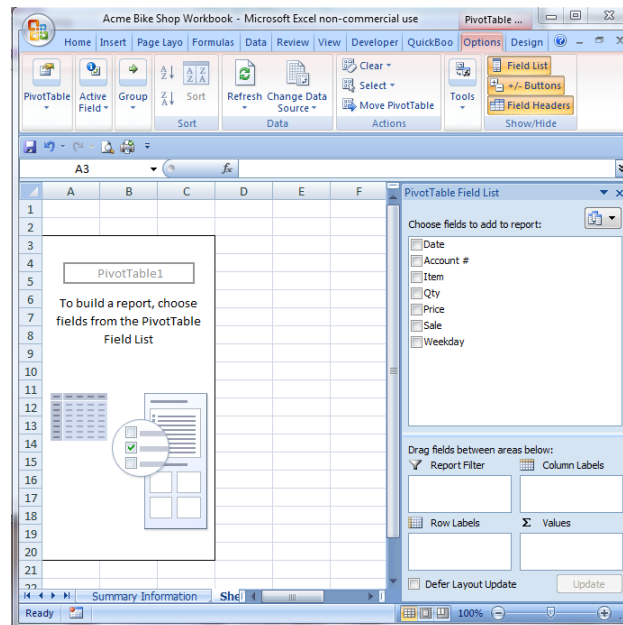


a.

3. Click the dropdown box by “Pivot Table” and select “Pivot Table”
4. The “Create Pivot Table” box will pop up. Note that the data range is automatically selected. You can modify the range if it did not automatically select the right data set.



- a.
5. After confirming that the data range is correct, click “OK”. The pivot table will be created on a new sheet.
6. The next screen will allow you to design your pivot table.



a.

7. You can decide how you want the summarized data to appear. Decide on what data fields you want on your report, what data should be summarized, and what should be in columns and what should be in rows. From a practical standpoint, the fewer columns you have, the easier it is to view your pivot table, so select the data with the shortest title or the fewest number of data points. For this report, you can either put dates or items in the column. If you don't like the way it looks, you can swap the row and column fields, or resize the columns and have the text wrap in the column headers.

Row Labels	6/1/2013	6/2/2013	6/3/2013	6/4/2013	Grand Total
Basket			20	60	80
Bicycle	300				300
Gloves		45	30		75
Helmet	60				60
Jersey		50			50
Rack			67.5		67.5
Shoes		60			60
Shorts		40			40
Tire Repair Kit	24.75		24.75	29.7	79.2
<b>Grand Total</b>	<b>384.75</b>	<b>195</b>	<b>142.25</b>	<b>89.7</b>	<b>811.7</b>

- a.
- b. NOTE: Notice that in the “Values” box, when “Sale” was dragged there, it defaulted to “Sum”. You can also select Count, Average, etc by clicking the down arrow next to “Sum of Sale” to change the field settings.

Value Field Settings

Source Name: Sale

Custom Name: Sum of Sale

Summarize by: Show values as

**Summarize value field by**

Choose the type of calculation that you want to use to summarize the data from selected field

- Sum
- Count
- Average
- Max
- Min
- Product

Number Format OK Cancel

i.

Those are the basics of creating a pivot table!