

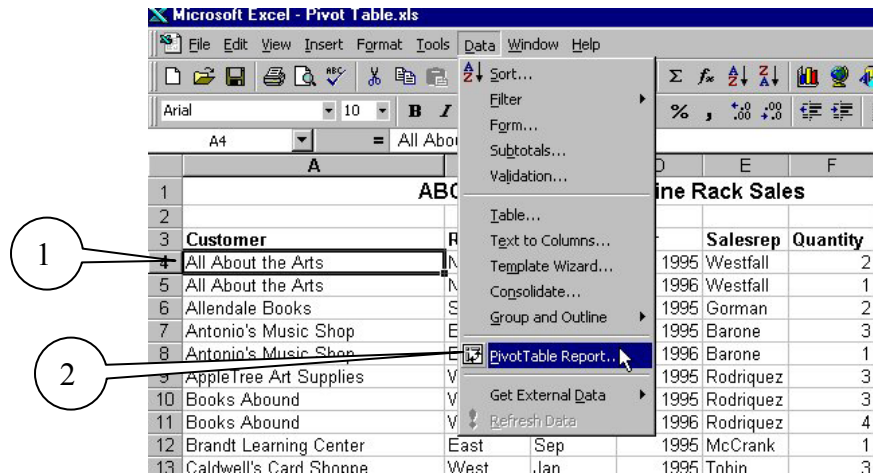
Using Pivot Tables In MS Excel 97

What is a Pivot Table?

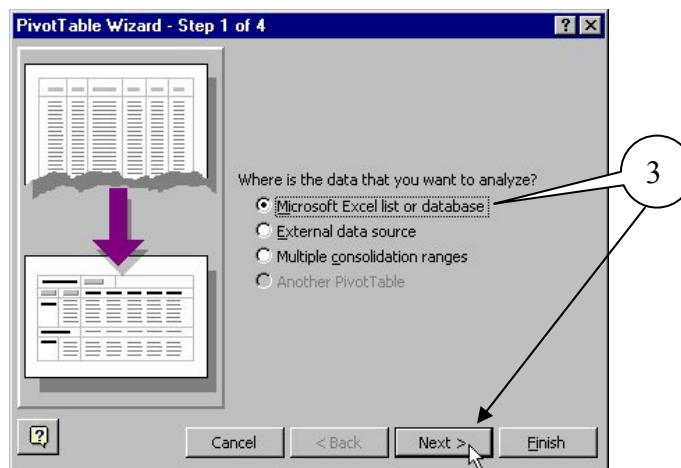
A pivot table is an interactive worksheet containing a summary of the data contained in an Excel list. It allows you to change the column and row headings and produce a table, which can help you summarize, organize and analyze your data. The data you wish to summarize must be in the form of a database and can be an Excel list or an external database.

Creating a Pivot Table from an Excel List

1. Click to place the active cell somewhere inside your list
2. From the menu bar, select Data, Pivot Table Report.



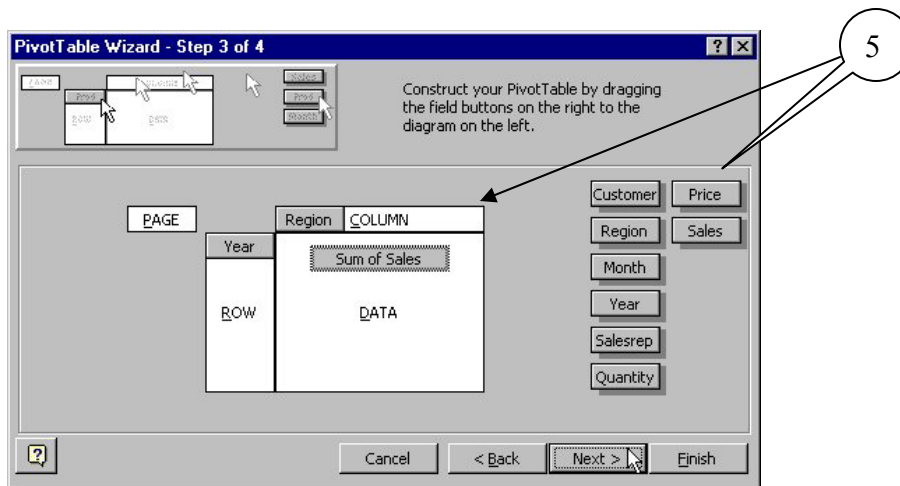
3. The Pivot Table Wizard will walk you through four steps to creating the pivot table. Step 1 asks what type of data you wish to make a pivot table from. Select Microsoft Excel list or database and click next.



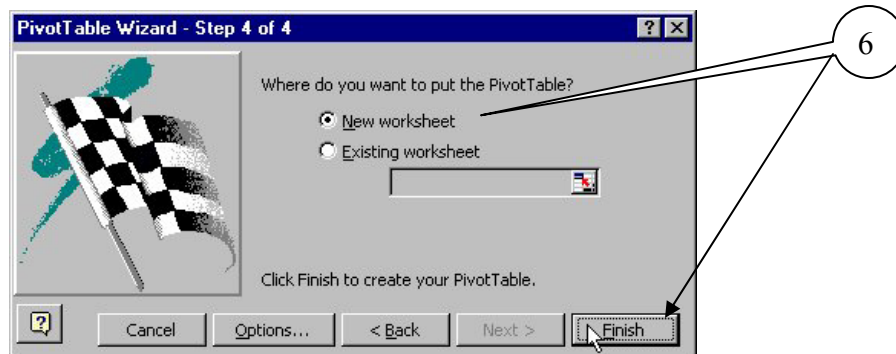
4. Step two of the wizard asks for the location of the data. If you clicked in the list first, Excel should guess the data range correctly. If not, correct the range and click next.



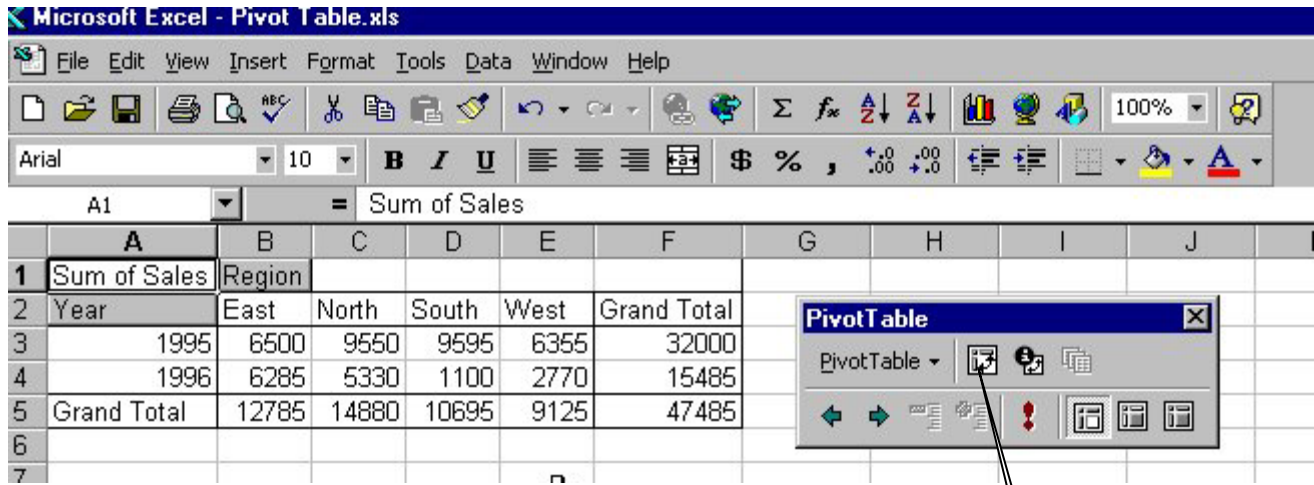
5. Step three of the wizard has you build the table. Click and drag the field labels from the right side of the screen to the diagram on the left. Use the label placement on the diagram to determine column and row headings, as well as which field gets summarized (data area). Once you have the labels in place, click next.



6. The last step of the wizard asks if you would like to place the pivot table on a new worksheet or on the existing sheet. It is recommended you select new worksheet and click finish.



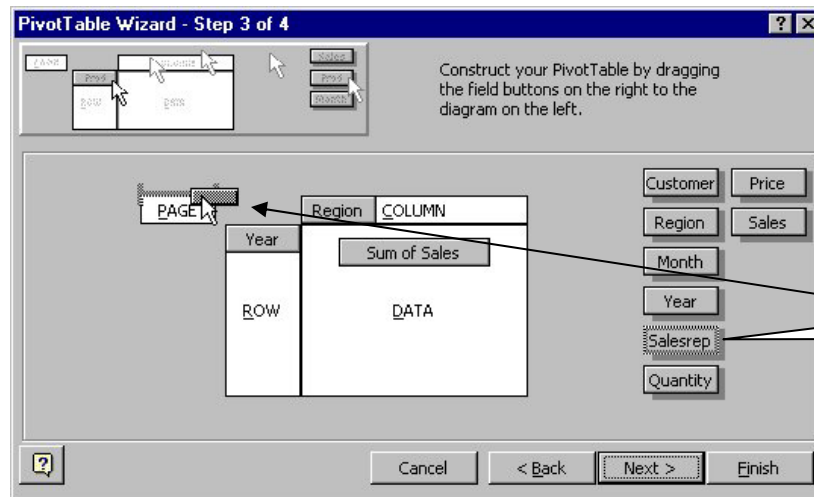
The new pivot table will be displayed, along with the pivot table toolbar. The toolbar can be used to edit and customize the table. (if the toolbar does not display, first click somewhere in the pivot table. If the toolbar still doesn't appear, from the menu bar select view, toolbar, and select pivot table.)



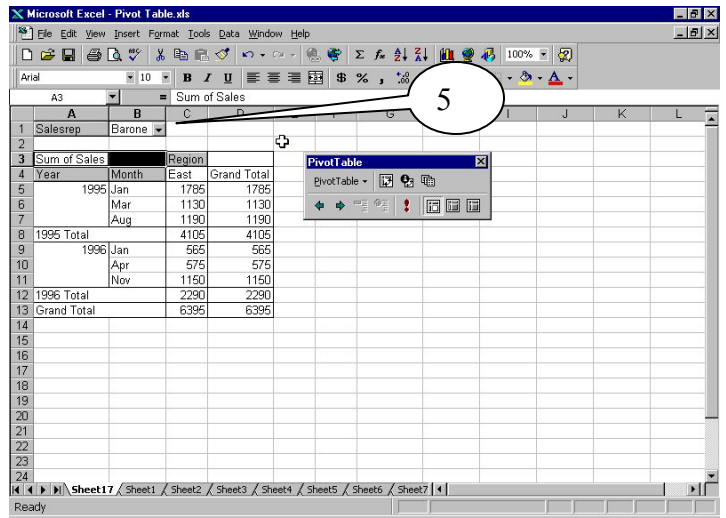
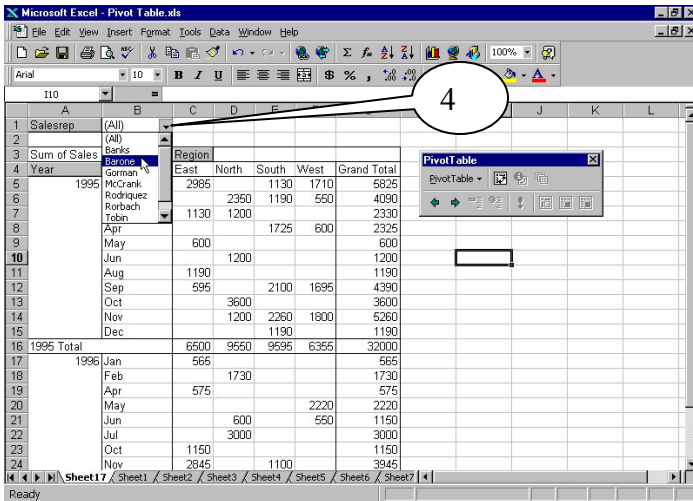
Editing the Pivot Table

Adding a field

1. Click somewhere in the pivot table.
2. On the pivot table toolbar, click the button for the pivot table wizard.
3. Back in the wizard, drag the Sales Rep field to the page area, and drag the month field to the row area, and click finish.

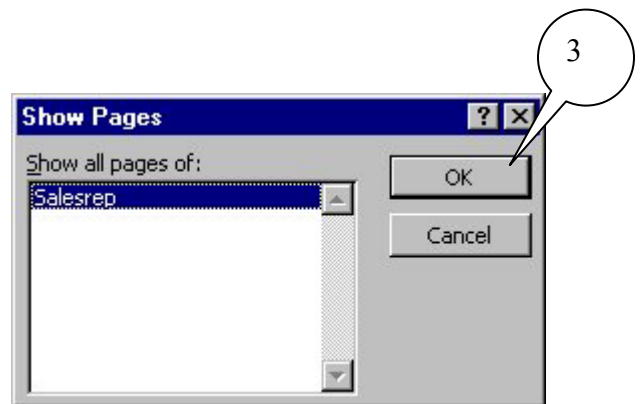
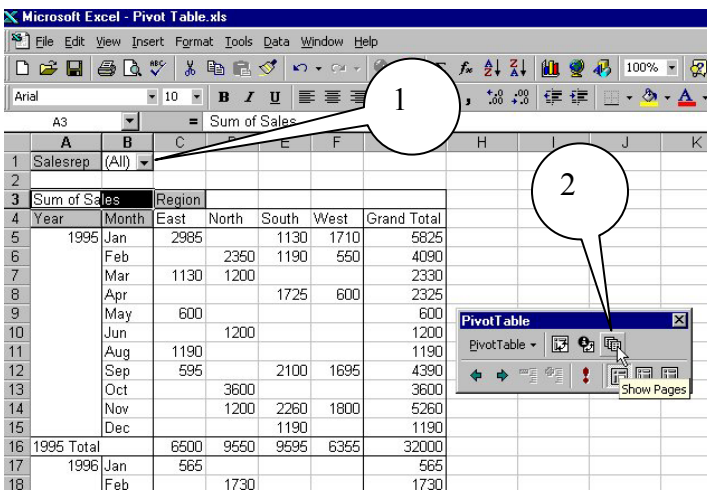


- The new pivot table will be displayed. Notice that the page field (salesperson) has a drop-down arrow button beside it.
- Using the drop-down arrow button, change the salesperson field from 'all' to 'Barone' and back to 'all', to see the options available.

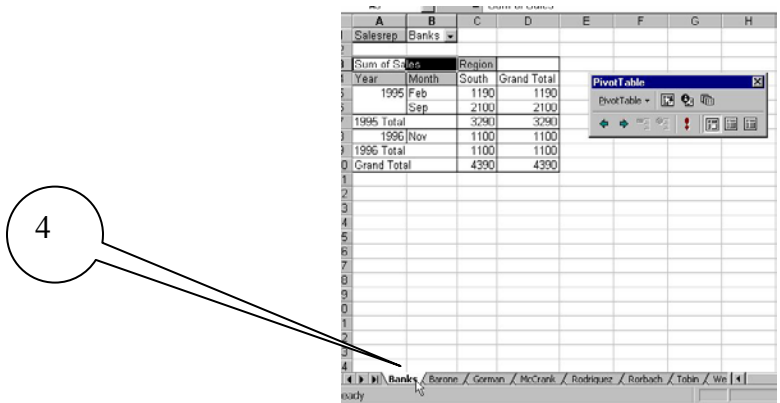


Using the Show Pages feature

- Display all the salesreps' data.
- Click on the 'Show Pages' button on the pivot toolbar.
- In the show pages window, 'Salesrep' will be selected. Click OK.



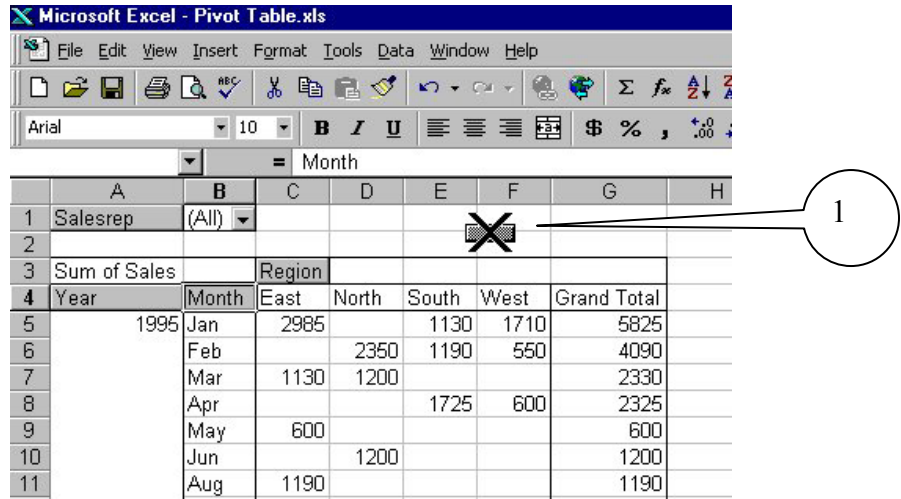
4. Excel will display each salesperson's data on a separate worksheet.



Deleting a Field

Fields can be deleted by dragging them off the pivot table without going through the wizard.

1. After returning the display to all salespersons, drag the month field off the pivot table grid until you see the black X over the field name, and let go to remove it from the table.



Reorganizing the display

Fields can also be re-organized right in the table without going to the wizard.

1. Drag the salesrep field from cell A4 to cell A4, dropping it to the right of the year field.
2. Drag the region field to cell A1 (the page area).
3. Display the data for just the East region, then for all regions.

The screenshot shows a PivotTable in Microsoft Excel. The PivotTable is structured as follows:

Region	(All)						
Sum of Sales							
Year	Salesrep	Total					
1995	Banks	3290					
	Barone	4105					
	Gorman	6305					
	McCrank	2395					
	Rodriguez	4045					
	Rorbach	4800					
	Tobin	2310					
	Westfall	4750					
1995 Total		32000					
1996	Banks	1100					
	Barone	2290					
	McCrank	3995					
	Rodriguez	2770					
	Rorbach	3600					
	Westfall	1730					
1996 Total		15485					
Grand Total		47485					

The 'PivotTable' task pane is visible on the right side of the screen, showing the current PivotTable configuration.

Changing the Subtotal data displayed

At this point, the data is displayed with totals for each year, and a grand total. We can ask Excel to display additional subtotals other than sum.

1. Click in cell A4 to select the year field.
2. Click the Pivot Table Field button on the pivot toolbar.

The screenshot shows Microsoft Excel with a PivotTable. The PivotTable has 'Year' as the row field and 'Salesrep' and 'Total' as column fields. The data is as follows:

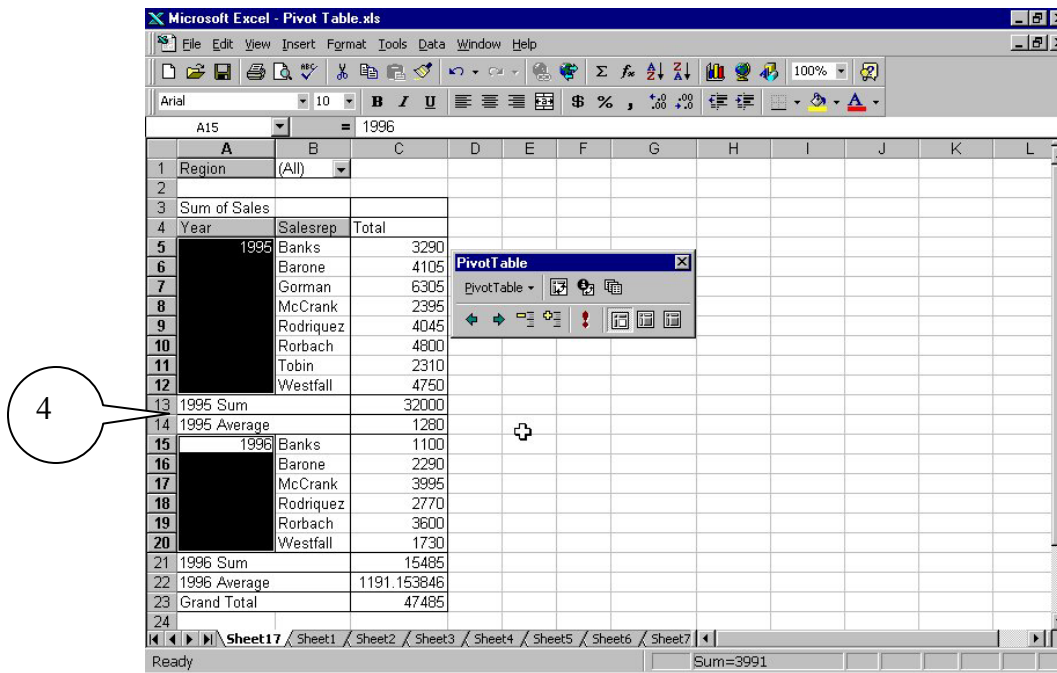
Year	Salesrep	Total
1995	Banks	3290
	Barone	4105
	Gorman	6305
	McCrank	2395
	Rodriguez	4045
	Rorbach	4800
	Tobin	2310
	Westfall	4750

The PivotTable Field task pane is open, showing the 'Year' field selected. Callout '1' points to cell A4, and callout '2' points to the PivotTable Field button on the toolbar.

3. In the Pivot Table Field window, click to select sum and average for the subtotals you wish displayed, and click OK.

The screenshot shows the PivotTable Field task pane. The 'Name' field is 'Year'. The 'Orientation' is 'Row'. The 'Subtotals' section is set to 'Custom', and the list of subtotals includes 'Sum' and 'Average'. The 'Hide items' list contains '1995' and '1996'. The 'Show items with no data' checkbox is unchecked. Callout '3' points to the OK button.

4. Your pivot table will now display with the data for each year averaged as well as summed.



Changing the formatting of a field

The totals by year are displayed as numbers. We may wish to display them as currency.

1. Select the sum of sales field (click in cell C5).
2. On the pivot toolbar, click the pivot table field button.
3. In the pivot table field window, click the number button.



- This will bring you to the format cells dialog.
- On the left side of the screen, select the type of format you want (currency).
- On the right side of the screen, set the number of decimals you wish, whether you'd like the dollar sign (\$) displayed, and how you wish negative numbers to display. When these are set, click OK.

