

Pivot Tables

Pivot Tables allow spreadsheet data to be summarised into reports similar to those created in database programs such as Microsoft Access and FileMaker Pro. Within the spreadsheet data the columns become the fields of the database and the rows become the individual records.

There are three types of fields (columns) in a Pivot Table:

- Category Fields** which contain data that can be grouped together, for example, Departments of a business.
- Data Fields** which contain numerical data on which calculations such as sum or average can be applied.
- Arbitrary Fields** which contain general data that cannot be grouped or have calculations applied to it, for example, a person's first name.

Loading the Prepared Data

The sales data for a month for an online store that sells products over the internet has been prepared for you and summaries of the data are required.

- 1 Load Microsoft Excel or close the current file.
- 2 Click on the OPEN icon in the QUICK ACCESS TOOLBAR or select OPEN from within the FILE tab or FILE menu.
- 3 Access the CHAPTER 20 folder of the EXCEL 2022 SUPPORT FILES and load the file:

Selanything Sales

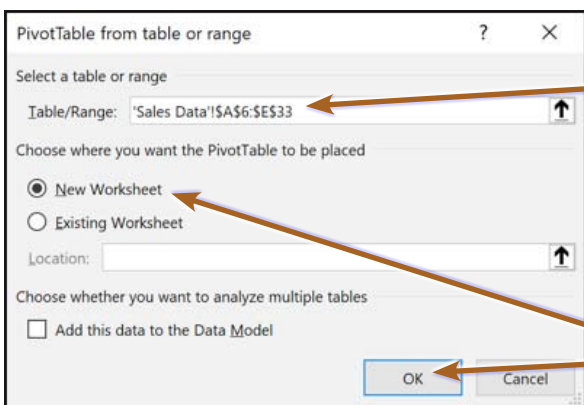
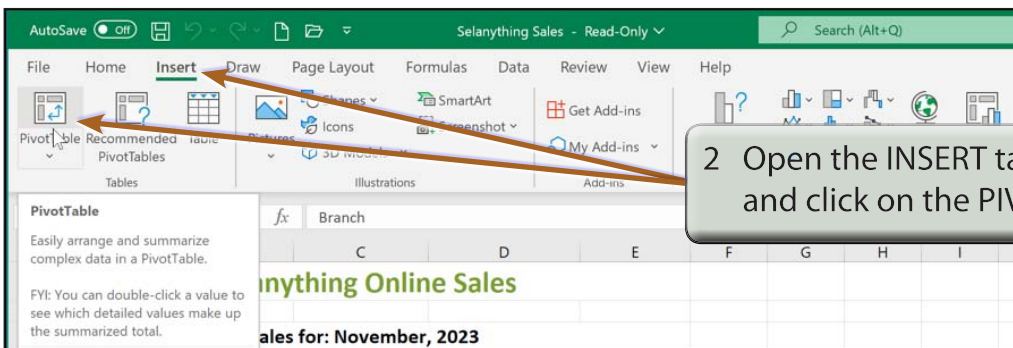
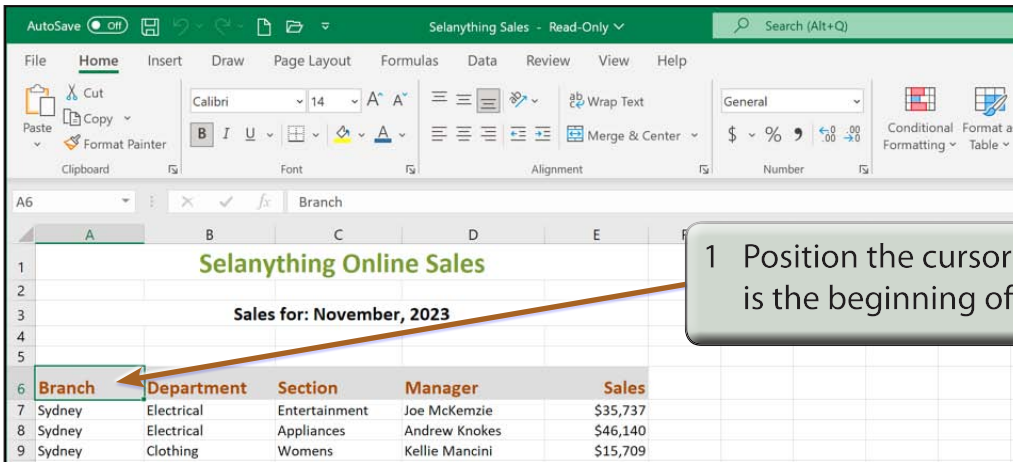
Selecting YES to the READ-ONLY dialogue box.

- 4 Look through the data to familiarise yourself with it. There are three Branches and, within each branch, there are 4 Departments with sections within each Department. The figures show the total sales for a month for each section.

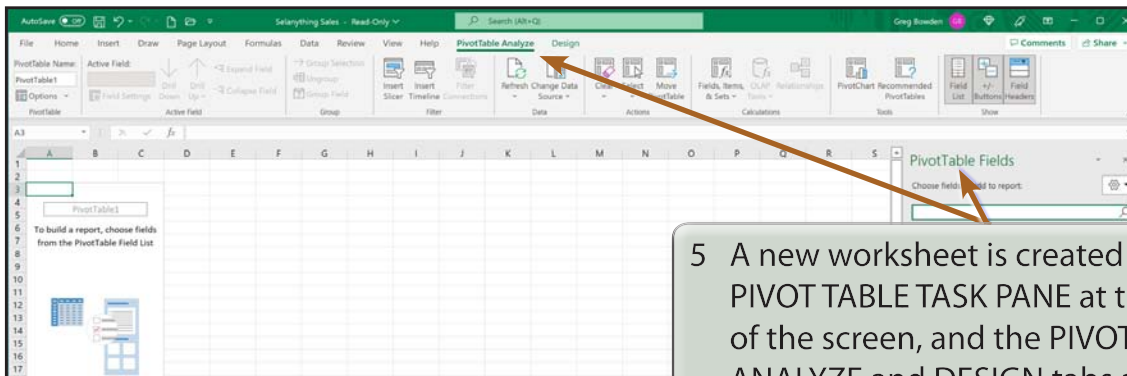
Creating a Pivot Table

A Pivot Table will be used to summarize the sales for the month.

A Setting Up the Pivot Table



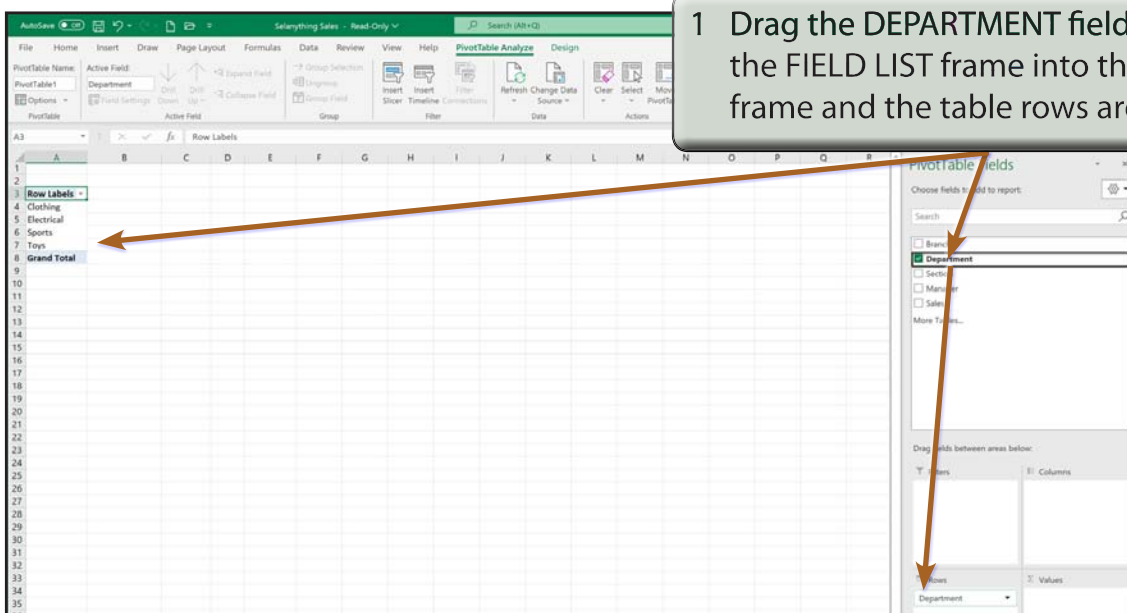
NOTE: When setting up a spreadsheet that will have Pivot Tables created from it, it is best to have no blank rows or columns. If there are blank rows or columns, the Pivot Table wizard will only select the data up to the blank row or column.



5 A new worksheet is created with the PIVOT TABLE TASK PANE at the right of the screen, and the PIVOT TABLE ANALYZE and DESIGN tabs added to the RIBBON.

B Inserting the Rows, Columns and Data

The Pivot Table is created by placing fields in the frames at the base of the PIVOT TABLE FIELDS pane. Let's set the Departments to be down the left of the report, the Branches across the top and the Sales to be the data within the Pivot Table.



1 Drag the DEPARTMENT field from the FIELD LIST frame into the ROWS frame and the table rows are created.

2 Drag the BRANCH field from the FIELD LIST frame into the COLUMNS frame to create the column values.

Column Labels	Melbourne	Sydney	Grand Total
Row Labels - Brisbane			
Clothing			
Electrical			
Sports			
Toys			
Grand Total			

3 Drag the SALES field from the FIELD LIST frame into the VALUES frame.

Sum of Sales	Column Labels	Melbourne	Sydney	Grand Total	
Row Labels - Brisbane					
Clothing		46735	46735	38507	131977
Electrical		72118	72118	81877	226113
Sports		56769	56769	52248	165786
Toys		15767	15767	14469	46003
Grand Total		191389	191389	187101	569879

4 The summary table is created showing the sales for each Department within each Branch and Grand Totals are provided for the DEPARTMENT and BRANCH sales.