INNOVATION
Training & Consulting, Inc

How to Make a Pivot Table in Excel

A pivot table is a powerful tool to analyze and visualize data. Once the simple set up steps are done, you will be on your way to turning data into information that is actionable.

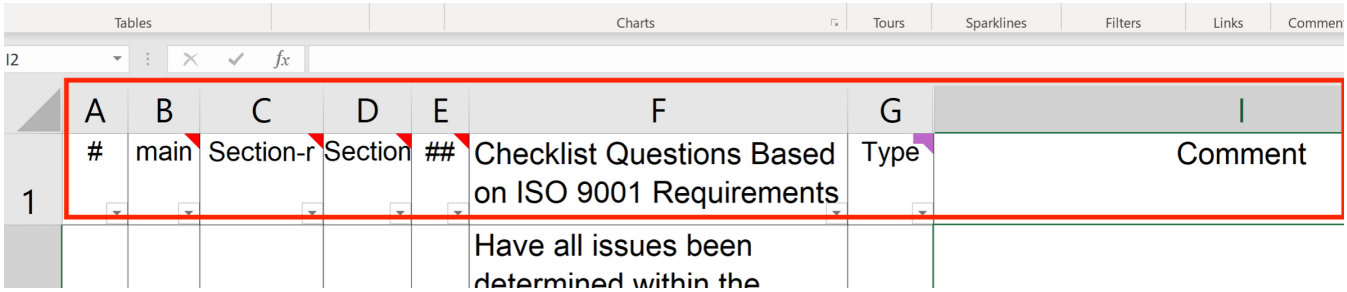
View our full instructional video on Youtube: bit.ly/ITCI-pivot

• Spreadsheet Setup•

1. The top row is best to be the header row to be able to update data and charts easily. If you want to have title for the spreadsheet, it is better to have that within “Custom Header” under the Page layout tab.

2. No blank columns can exist within the range of data. Unhide all columns to look for hidden ones.

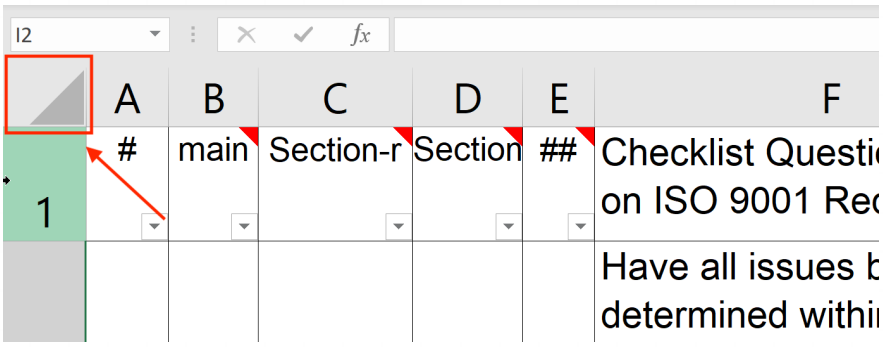
3. Every column must have a unique title in the top row, the header row. These will be the descriptors that show up as choices later in the pivot table set up.



4. At least one column must have entries in every row. If the sheet has some blank lines, just add a dummy column out of the print range with x or other entry in every row.

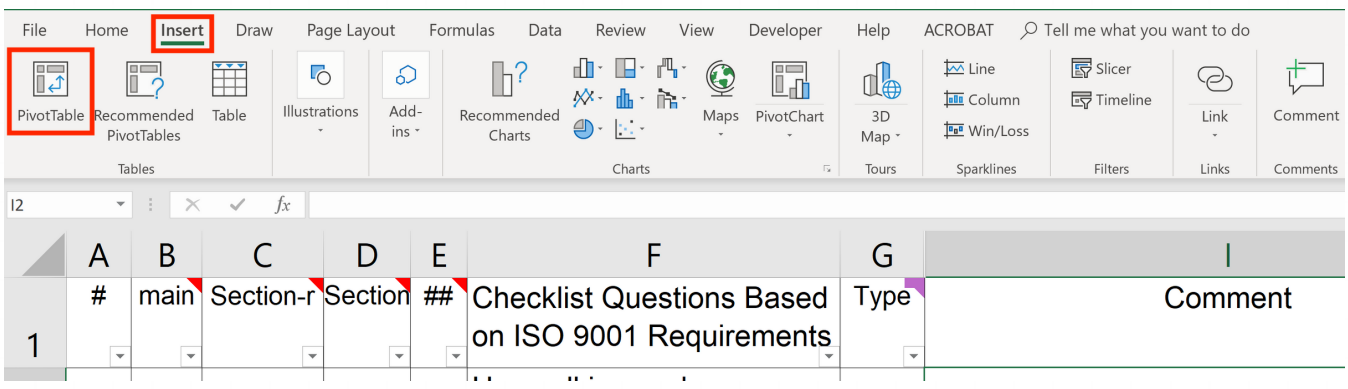
• Pivot Table Setup•

1. Select the whole sheet by clicking the top left square (above row 1 and left of column A).



2. Select “Insert”.

3. Select “pivot table”.

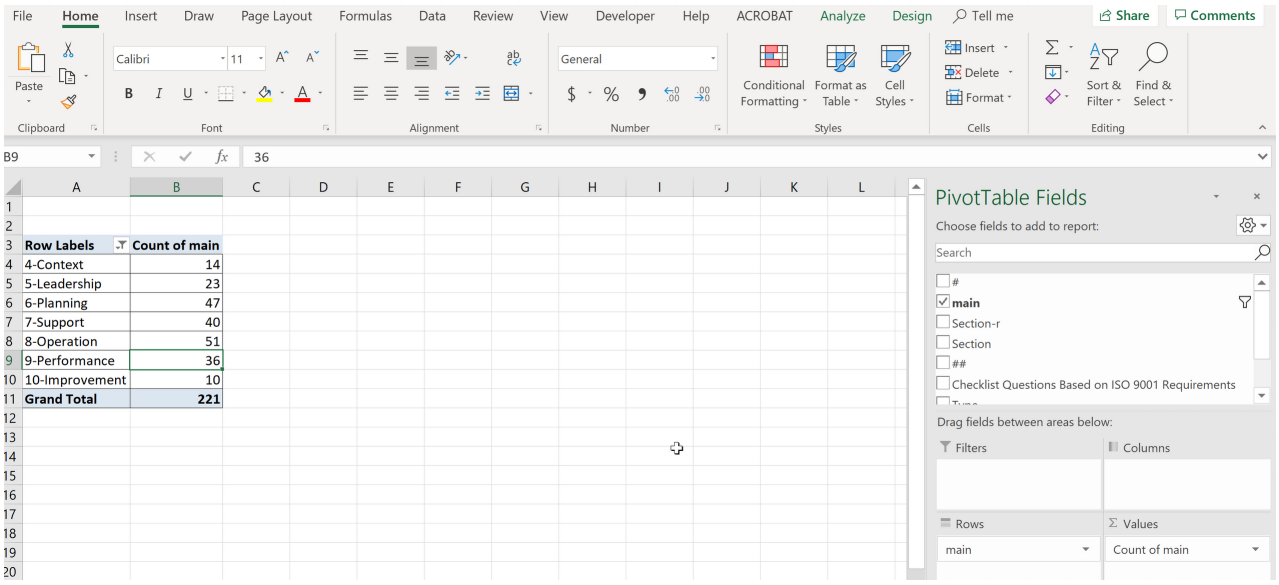


4. Select in “new sheet”. Since you already selected the whole spreadsheet, you do not need to select a range in the spreadsheet.

5. If you get an error saying something is not valid, look again for blank column or one without a title in your first row of data.

6. If no error, then you should get the pivot table sheet. On the right side, each of the column headings should be a selectable “field” to put into the “pivot table” on lower right side.

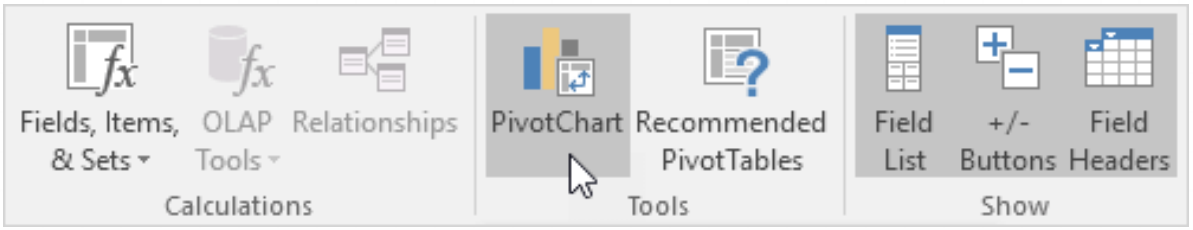
7. Select a field by dragging it down into the pivot table. It can be placed as column, row, or in the center to be the data.



8. It is easy to change where you put the field to get the type of information that is useful.

9. The default for the data is a “count” and if you left click the field, you change to “sum” or other function.

10. To visualize the data, add a Chart and select the type of chart (pie, bar, etc.) and put on separate sheet. Click on the Analyze tab, go to Tools and click PivotChart.



11. To get a pareto chart look, select the data in the pivot table and sort in descending order on the field you want.

• Helpful Hints•

1. Sometimes you will get data that looks confusing or is too complicated in the pivot table or chart. Remember that you can deselect some field entries from the drop down list and it will clean up the charts (e.g., eliminate blanks or lower level values).

2. It is highly likely that you will find slightly different entries in the main fields such as misspellings, extra spaces, etc. Notice what they are on the pivot table, and then make the changes in the main page of data.

3. To update data in the pivot table, put the cursor somewhere in the data table, right click and select “refresh”. Both table and charts will update. This is part of the magic of pivot tables and charts.

4. You may need to sort out information into new columns in order to view/analyze the information. For example, you might have a date column and need to create month and year columns to dissect info by year or month.