Pivot Tables

Preparing your Source Data

- Make sure each column has a heading. These are used to name the fields in the PivotTable report (a field summarizes multiple rows of information from the source data).
- Group similar data together in columns *(Ex. text items in one column, numbers in another and dates in another)* and remove any blank rows or columns.

Creating a PivotTable Report

1. Select a cell or range of cells and go to the Insert ribbon.
2. In the Tables chunk, click the arrow on PivotTable, and on the menu, click PivotTable. The Create PivotTable dialog box opens.

3. Select a table or range is already selected. The Table/Range box shows the range of the selected data.
4. New Worksheet is selected as the place where the report will be placed (you can click Existing Worksheet if you don't want the report placed in a new worksheet). Click OK.
5. On the left is the layout area ready for the **PivotTable report**, and on the right is the **PivotTable Field List**. It shows the column titles from the source data. Each title is a field in the list.

![PivotTable Fields List](image)

6. In the **field list**, select the check boxes next to the fields that you want to add to the report. Fields are automatically added to the report.

   - **Non-numeric fields** are added to the **Row Labels** area of the report. As you add more non-numeric fields, Excel places them on the inside of fields already on the PivotTable report, building a hierarchy. **Numeric fields** are added on the right.

   - To remove a field from the report, clear the check box next to the field name in the field list.

   - To remove all the fields from a report and start over, click the **Options** tab on the Ribbon under **PivotTable Tools**. In the **Actions** group, click the arrow on the **Clear** button, and then select **Clear All**.

7. To delete the entire report, click the **Options** tab. In the **Actions** group, click the arrow on **Select**. Click **Entire Table**. Then press DELETE.

**Working with Data**

**To Sort a Field:**

1. Right-click a cell in the field you want to sort.
2. Point to **Sort**, and then click an option. *(Ex: click Sort Largest to Smallest or More Sort Options)*.
To Group a Field:
1. Right-click a cell in the field you want to group, and then click Group.
2. In the Grouping dialog box, select an option, and then click OK. (To ungroup, click in the grouped field, right-click, and then select Ungroup.)

To Add a Report Filter:
Use a report filter to focus on a subset of data in the report, often a product line, a time span, or a geographic region.
1. In the PivotTable Field List, right-click a field name.
2. Select Add to Report Filter.

To Pivot a Report:
Transpose the vertical or horizontal view of a field, moving rows to the column area or moving columns to the row area:
Right-click the field you want to pivot.
1. Click on Move.
2. Select Move "field name" to Columns, or select Move "field name" to Rows.

To Move a PivotTable:
1. Click the PivotTable report.
2. Click on the Options tab on the ribbon, under PivotTable Tools.
3. In the Actions group, click Move PivotTable. The Move PivotTable dialog box opens.
4. Under Choose where you want the PivotTable report to be placed, either select New Worksheet or type the first cell in the range of cells where you want to locate the PivotTable report in the Location box for Existing Worksheet.
5. Click OK.