

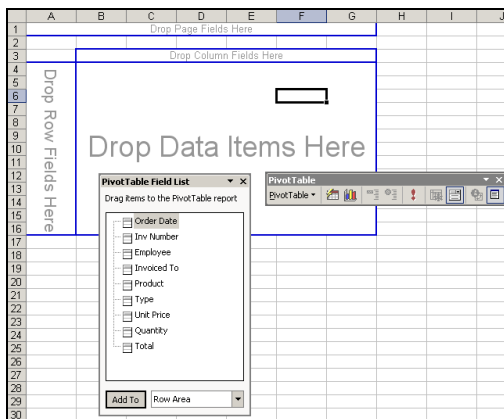
UPDATING AND AMENDING A PIVOT TABLE

When you change the data in the source list, the Pivot Table itself does not automatically update. The way to change the data in the Pivot Table so that it picks up the source data is to **Refresh** it.



ADDING NEW ROWS, COLUMNS OR PAGES

You can change the structure of your Pivot Table after it has been created by adding new rows or columns. This will increase the level of detail in your Pivot Table. You can also add additional fields to the Page area of the Pivot Table; this has the effect of restricting the level of detail shown in the Pivot Table.



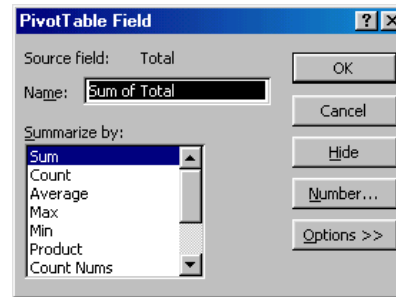
To add a new row, column or page field first select a cell in the Pivot Table and then drag buttons on and off the Pivot Table Field list.

DATA ANALYSIS FUNCTIONS

Pivot Tables automatically sum or count the data in them depending upon the data type. However, you can choose from several other functions such as average, standard deviation, etc.

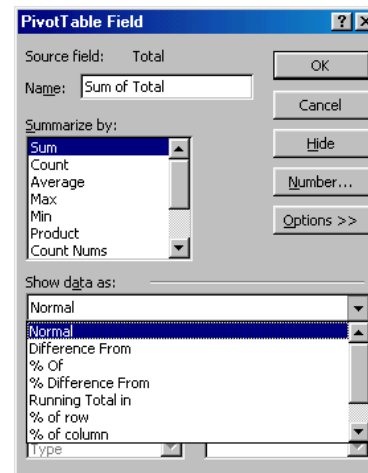
Point the name of a field and double click to see the **PivotTable Field** dialog box as illustrated below:

DATA ANALYSIS FUNCTIONS CONTINUED...



Select the function as required.

In addition to changing the function applied, you can also use this dialog box to show data as a % of another column or the entire row or column or in a number of other ways. Click **Options** to see these features as illustrated below:



You can also add more than one instance of a field to a Pivot Table with each occurrence of the item having a different summary function. To do this, go back to the Pivot Table Toolbar and drag a second copy of the field into the **DATA** area of the Pivot Table. Then double click on the button and you will be able to choose a different function.



Creating Excel Pivot Tables

A Quick Guide

For more Excel guidance visit : knowledge.senansolutions.com



INTRODUCTION

Pivot Tables provide a flexible way of analysing and presenting large amounts of data in lists and tables. Instead of viewing a long list of data in a conventional format of columns and rows, you are able to determine exactly how it is organised and presented. The source data for a Pivot Table can be either a Microsoft Excel worksheet or another program.

Although the data in the Pivot Table looks like any other worksheet data, you cannot directly enter or change it. The Pivot Table is linked to the source data and the values in the cells are read-only. You can however change the formatting of the Pivot Table and use them for charting, etc.

PREPARING DATA FOR A PIVOT TABLE

Before using the PivotTable and PivotChart Wizard to create a PivotTable report, here are a few important things to look for in your source data:

- The first row must have a heading for each column. The wizard will use these column headings as names for the **fields** (its word for data groupings) that you can drag and drop onto the PivotTable layout area.
- There should be no empty rows or columns within the range of data used for the report. For example, blank rows used to separate one block of data from another should be removed.
- Each column should contain only one kind of data— for example, include text in one column and numeric values in a separate column.
- Excel automatically creates subtotals and grand totals in a PivotTable report. If the source data contains automatic subtotals and grand totals created with the **Subtotals** command on the **Data** menu, use that command to remove them before you create the report.

CREATING A PIVOT TABLE

To create a Pivot Table; select **PivotTable and Pivot Chart Report** from the **Data** menu

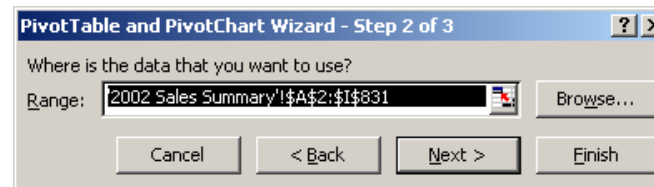
In **Step 1** you must specify the type of source data; you will normally choose **Microsoft Excel List or Database**.

Specify whether you wish to create a **Pivot Table** or a **Pivot Chart**



Click on the **Next** button to move on to step 2.

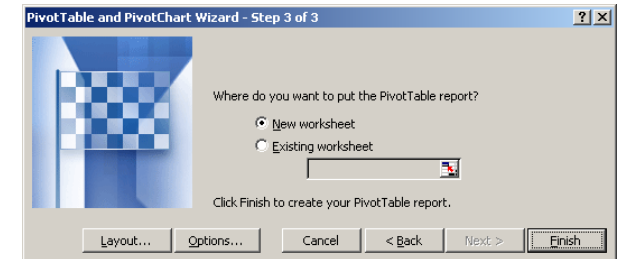
In **Step 2** you must specify the source data area.



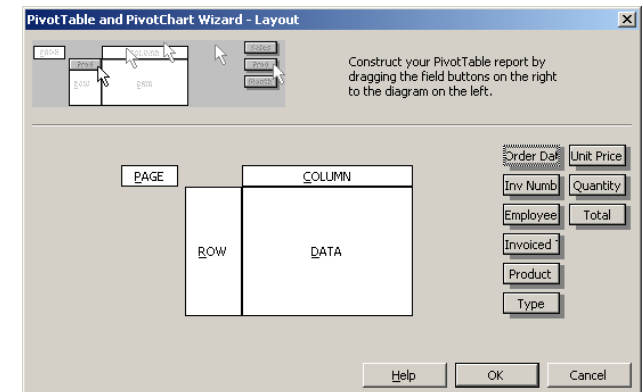
If your table of data complies with the rules outlined previously, the wizard will recognise the full table range and show that range in this dialog box. Click **Next** to move on.

CREATING A PIVOT TABLE CONTINUED...

Step 3 allows you to choose the location and layout of the Pivot Table:



The **Layout** dialog box looks like the following, you are able to choose the fields that you want shown in the Pivot Table. Basically, this step allows you to define the layout of the Pivot Table.



You must first determine which fields contain the data you wish to summarise and then drag the corresponding grey box into the **DATA** area of the dialog box. If you choose a numeric field in this area, the Wizard will automatically sum the data; if you choose a non-numeric field the Wizard will opt to count it.

The next step is to determine how you want the data arranged. Drag the grey buttons for the chosen fields either on to the **Column** or **Row** heading areas. If you want to display a field as a heading on separate pages, drag its button to the **PAGE** area of the dialog - this effectively allows you to create a third dimension to your data.