



Pivot Table Basics

Objectives of this session

1. Break down the myth that pivot tables are:
 - Scary,
 - Require a lot of technical knowledge
2. Pique your curiosity
3. Build Your Confidence

Why Use Pivot Tables?

1. Pivot tables transform a two two-dimensional block of data - (ie – spreadsheet) and turn it into a multi-dimensional, dynamic tool.
2. Pivot tables are a great for summarizing and synthesizing
 - A little or A LOT of data...
 - Enabling better visibility and decision criteria
3. Pivot Tables allow you to summarize information
 - Across numerous criteria / attributes
 - Without having to create a series of manual calculations.

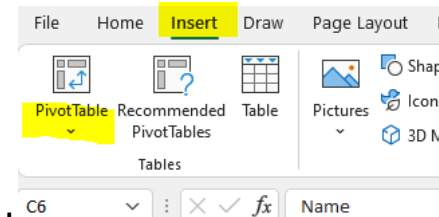


Pivot Tables
are for
power users,
right?

Sure – but, they are so simple, ANYBODY can create and use them – thus **ANYONE** can be a power user!

4 Steps – and you're off and running:

- Step 1 – Select “Insert”, “Pivot Table” then “From Range”



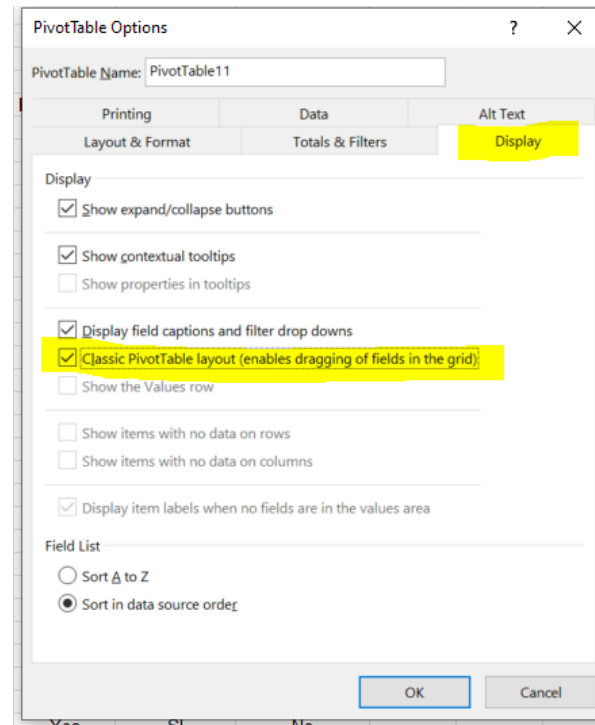
- Step 2 – Highlight the block of data (the table range) you want to build your pivot table from.
- Step 3 - Choose either “A New Worksheet” or “Existing Worksheet”
 - If “Existing Worksheet” click the cell where you want the pivot table to be located – generally adjacent to the block of data works pretty well.
- Step 4 – Begin to create the “view” you want.
 - Remember – if your block of data doesn't include numeric values (sales, units, metrics) – that's ok – pivot tables will treat a field as a numeric (count) – such as Name.

When you add an additional field to an existing Pivot Table layout – the new field is treated like a “sub” field – and makes it a little harder to read:

To Fix / Improve:

1. Right Click on the Pivot Table and select Pivot Table Options
2. Select “Display” and Click on “Classic Pivot Table layout”
3. Then Right click on Pivot Table again and deselect “Sub Total”

Make your
Pivot Tables
Sing
(a few key tips)



Award Winner	Yes	
Guest	(All)	
Partner Type	(All)	
Row Labels	Count of Name	
Charles		1
No Response		1
Donna		1
Yes		1
Holly		1
No		1
Jill		1
Yes		1
Joe		1
Yes		1
Leo		1
No Response		1
Grand Total		6

Award Winner	Yes	
Guest	(All)	
Partner Type	(All)	
Count of Name		
Name	Attend	Total
Charles	No Response	1
Donna	Yes	1
Holly	No	1
Jill	Yes	1
Joe	Yes	1
Leo	No Response	1
Grand Total		6



Questions /
Need Help??

Feel Free to reach out to me directly and we can discuss in more detail:

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