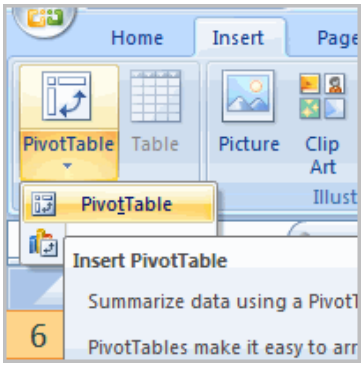
Introduction



Pivot table reports, or **pivot tables** as they are often called, can help you answer questions about your spreadsheet by analyzing the numerical information in various ways. If you work with spreadsheets with a lot of data, pivot tables can be an extremely useful tool. Pivot table reports give you power because you can **quickly find the answer** to many different questions and can manipulate your data in many different ways.

In this lesson, you will learn the basics of inserting and working with pivot table reports.

Pivot Table Reports

Video Watch the video! (10:41 min) - Tips for watching our videos.

Download the example to work along with the video.

Why are They Named Pivot Tables?

You may be wondering why it is called a pivot table. Basically, pivot tables allow you to **pivot**, or **move**, data so that you can produce answers to questions. Once you create a pivot table, you can very easily see what effect pivoting the data has on the spreadsheet information.

To Create a Pivot Table Report (Part I):

- Select the cells in your spreadsheet that you want to use in the pivot table report.
- Select the **Insert** tab.
- Click the **PivotTable** command.
- Click **PivotTable** again. Excel selects cells in the actual spreadsheet, and the **Create PivotTable** dialog box opens.
    - **Select a table or range** is already selected, and the **Table/Range** field shows the range of the selected data. **New Worksheet** is also selected by default as the place where the report will be placed.

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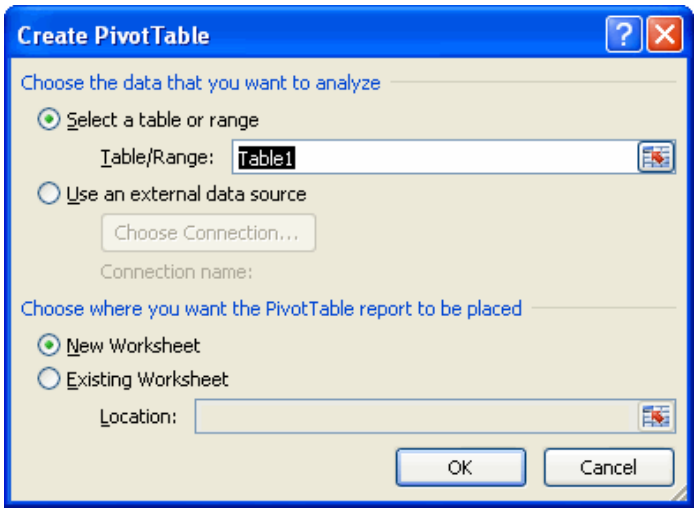

- Click **Existing Worksheet** and select a worksheet if you do not want the pivot table to appear in a new worksheet.
- Click **OK**.

Creating a Pivot Table Report

If you use the sample spreadsheet to create a pivot table, you can see that the column headings are **salesperson**, **region**, **account**, **order amount**, and **month**. When you create a pivot table, each **column label** in your data becomes **a field** that can be used in the report. The **Field List** appears on the right side of the report, while the **layout area** appears on the left.

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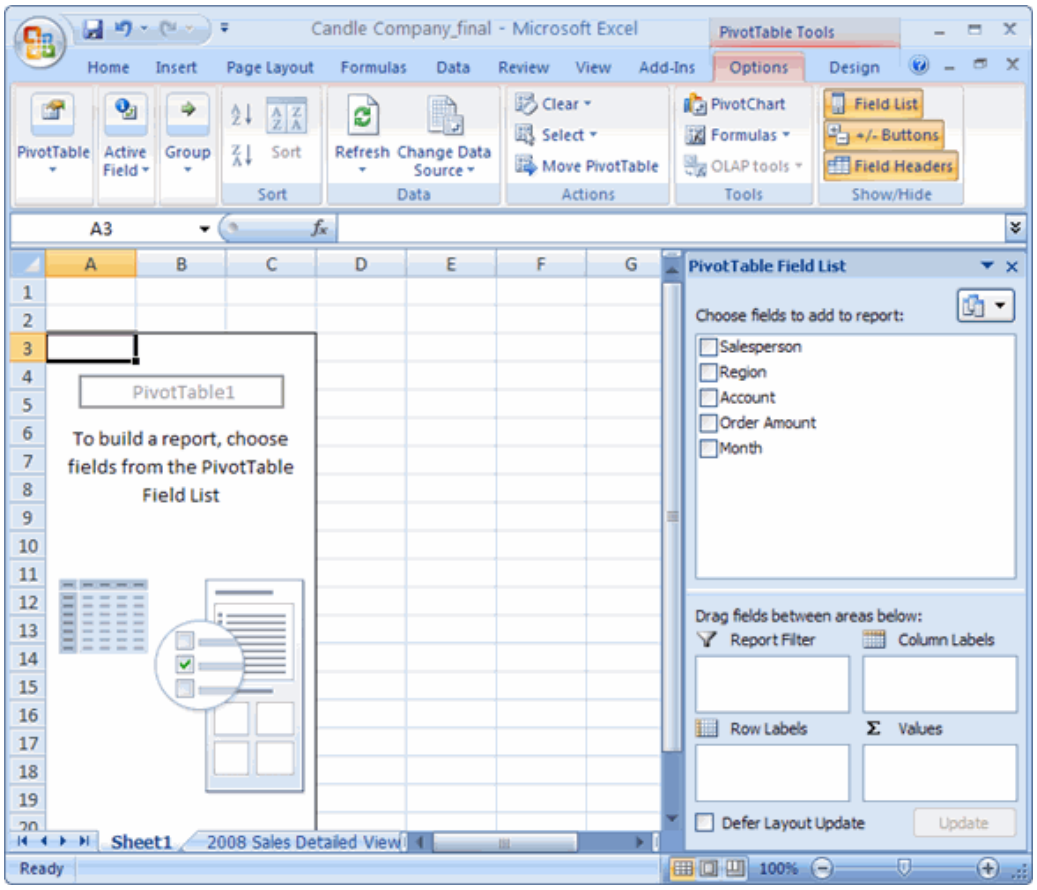

To Create a Pivot Table Report (Part 2):

- Determine what **question** you want your pivot table report to answer. For example, using the sample spreadsheet, you might want to know **which salesperson sold the greatest dollar amount**.
- Determine the **fields** that are necessary to answer this question. In this example, **salesperson** and **order amount**.
- Select the check box next to the **Salesperson field** in the **PivotTable Field List**. The field will appear in the drag-and-drop area at the bottom of the field list and in the layout area. The order amount data appears on the right. This is a default setting in Excel—data with numbers will always appear on the right.
- Select the check box next to the **Order Amount field** in the **PivotTable Field List**. The field will appear in the drag-and-drop area at the bottom of the field list and in the layout area. All of the salesperson data appears on the left side as rows.
- You can now see the **answer to your question** in the **report** on the left.

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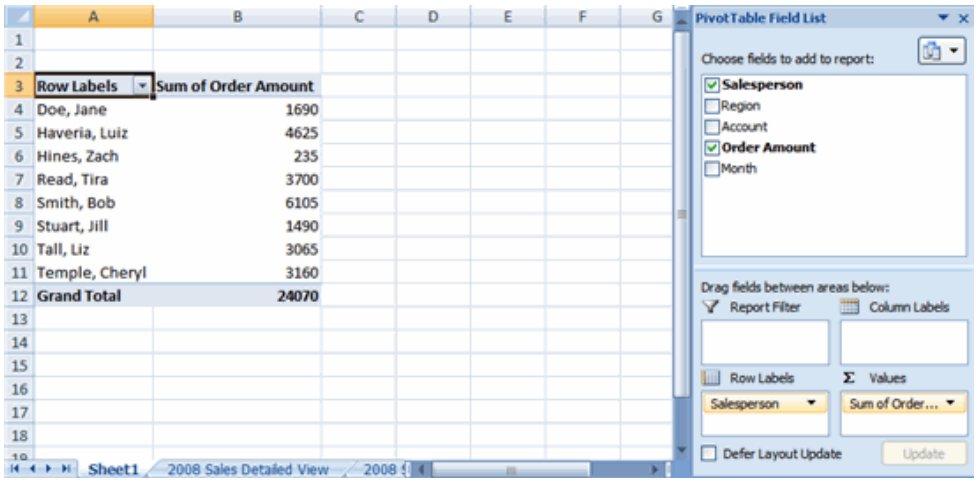
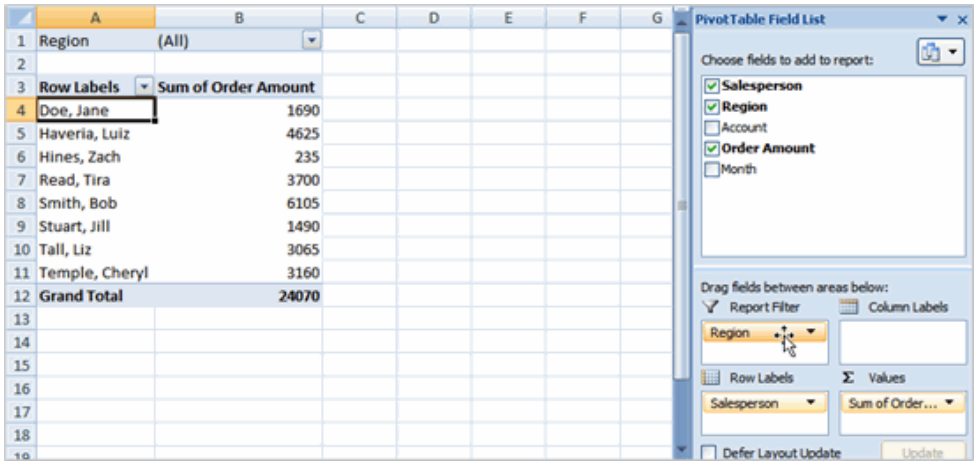


To Add a Report Filter:

- Select a **field** in the **Field List**. In this example, choose **Region**. By default, it will appear in the Row Labels group.
- Click and drag **Region** into the **Report Filter** section.
- Release the mouse button. The region appears at the top of the report as a filter.
- The **arrow** by the Region fields shows (All). To show just the data for a **specific region**, click the drop-down arrow and select the region. To see **multiple regions**, click the Multiple Regions box, select the regions to display, and then click OK.

Moving, or Pivoting Data:

- Click and drag a **field** from one area to another.



- Release the mouse button to drop the field in the new area. In this example, we move **Region** from **Report**

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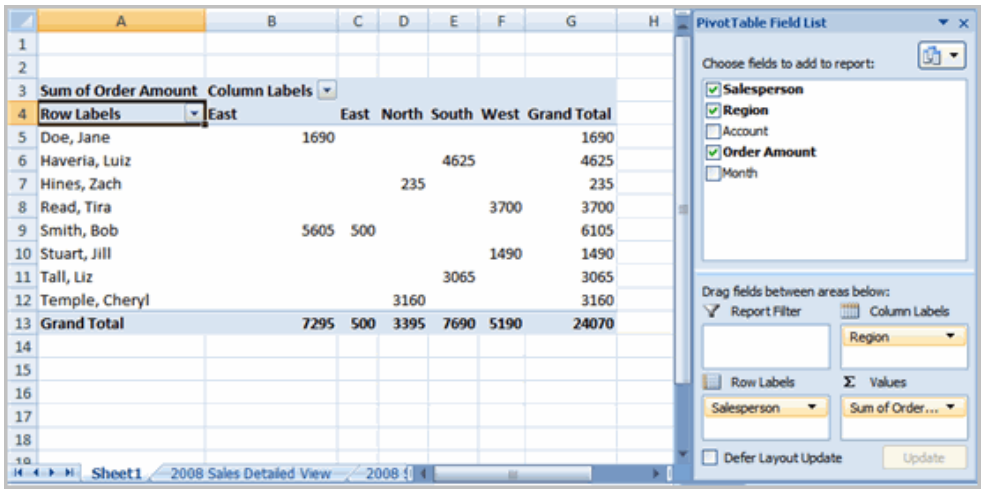
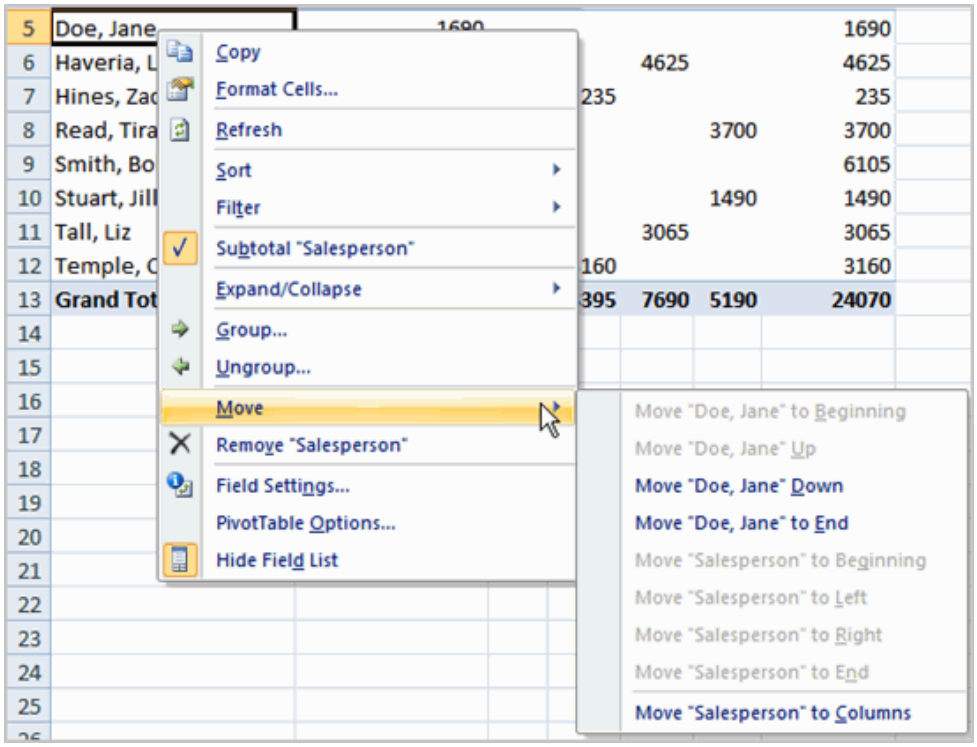
Filter to **Column Label**. The pivot table report will change.



OR

- Right-click one of the rows. A menu will appear.
- Select **Move** and then select a move option.



To Create a PivotChart

- Select the **Pivot Chart** command from the Options tab. The Insert Chart dialog box appears.

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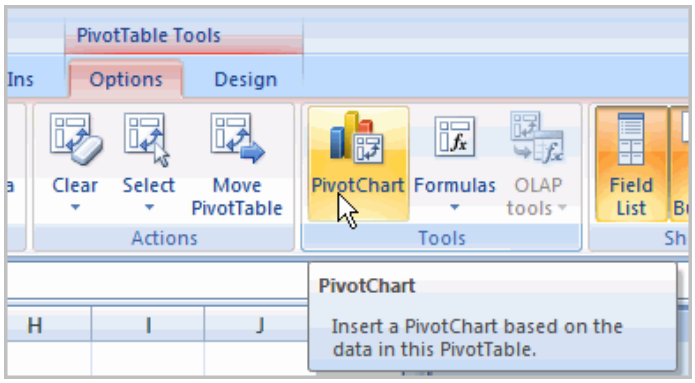

- Select the chart you'd like to insert.
- Click OK. The chart will now appear on the same sheet as the Pivot Table.

The information in the chart includes the information in the pivot table, rather than all the original source data.

Challenge!

Use the Company Sales workbook to complete this challenge.

- Create a pivot table report that calculates the amount each salesperson sold.
- Filter the report by **region**.
- View the data for the salespeople in the **North** and **West** region.
- Who sold the greatest dollar amount in those two regions?

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