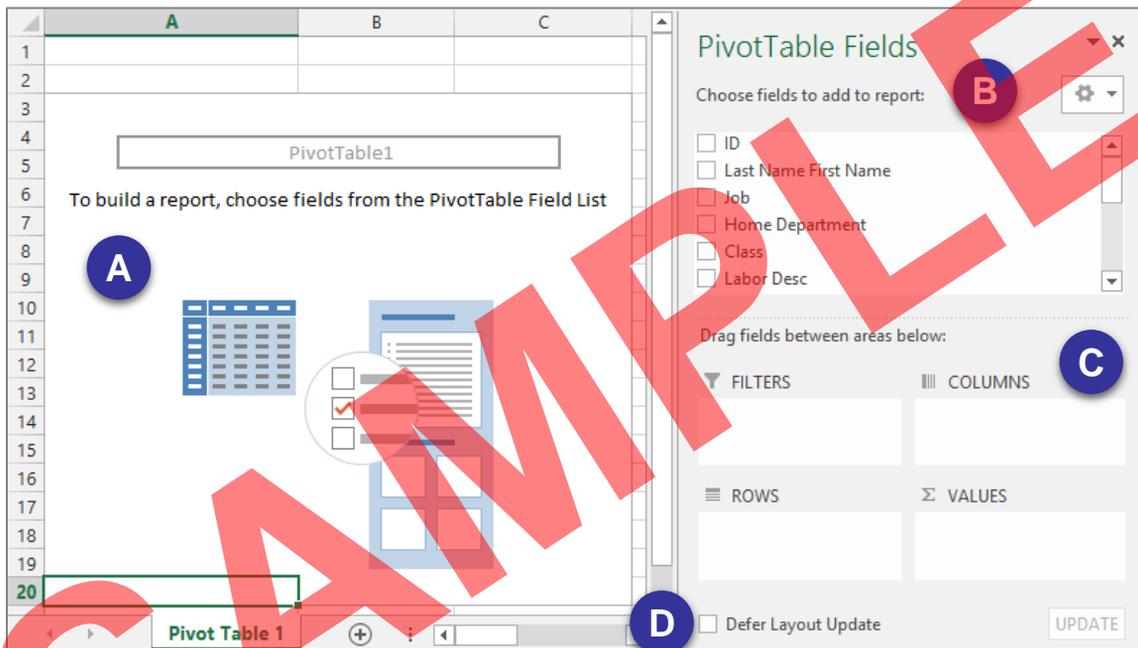# Working with Pivot Tables in MS Excel

What are PivotTables?

Being able to analyze all the data in your worksheet can help you make better business decisions. But where do you start? A pivot table helps to organize, summarize, and present your data so you and others can transform "data" into "information".

PivotTable Parts

		Description
A	**PivotTable Report Area**	The space reserved on a spreadsheet to display the pivot table.
B	**PivotTable Field List**	A list of all the fields in the defined data set used to generate the PivotTable Report.
C	**Areas of a PivotTable Report**	Data can be grouped in and presented in either **Rows** or **Columns**. **Filters** are used to control the data displayed in the rows and columns of PivotTable. **Values** are the calculated results of the data – sums, counts, averages, etc.
D	**Defer Layout Update & Update button**	A control that enables you to assign fields to the PivotTable areas then click the Update button to display the results. Used most when working with very large data sets (5,000+ records).

Working with Pivot Tables in MS Excel

Step by Step!

Create a PivotTable

1. Select a cell inside your data set.

2. Click the **Insert** tab then click the **PivotTable** button. The **Create PivotTable** dialog box opens.

3. Confirm the **Table/Range** displayed is correct.

4. Chose the location of the PivotTable report:
   *Select **New Worksheet** or
   *Select **Existing Worksheet** and use the field selection button to highlight the range of cells to be used for displaying the PivotTable report.

5. Click the **OK** button.

6. Click and drag the PivotTable Fields into the PivotTable report area boxes.

*The PivotTable Report results will display immediately if the **Defer Layout Update** is unchecked.

Add or Remove Fields

1. Click the checkbox next to the field name in the PivotTable Field list to display or remove a field.

2. Once a field is displayed, drag it into the desired PivotTable Report area box.

Sort Data in Your PivotTable

1. Click the drop-down arrow displayed next to field in area box or in the PivotTable Report.

2. Click **Sort A-Z** to sort in ascending order or **Sort Z-A** to sort the in descending order.
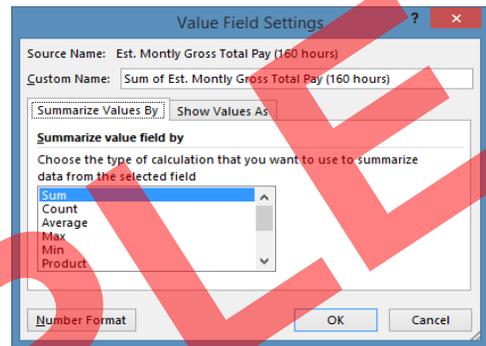
   OR

   Click **More Sort Options** for advanced sorting options.

Advanced sorting options include:

- Manual – drag and drop items to rearrange them

- Ascending – by row field or value field

- Descending – by row field or value field

Change Value Field Settings

1. Click the drop-down arrow of the field in the Values box

2. Select **Value Field Settings**.

3. Change the name displayed in the **Custom Name** field, as needed.

4. Select the calculation to be used from the **Summarize value field by** list.

5. Click the **Number Format** button to select the correct format for the data values.

6. Click the **Show Values As** tab to display the values as a **percentage**, **Running Total**, or in a specific **Ranking**.

7. Click the **OK** button to save your changes.

Filter Data in Your PivotTable

1. Click the drop-down arrow displayed next to field in area box or in the PivotTable Report.

2. Remove the **Select All** check.

3. Select the individual items you wish to display in the report.

4. Click the **OK** button to apply your filter.

To clear the filter:

1. Click the drop-down arrow displayed next to field in area box or in the PivotTable Report.

2. Select **Clear Filter From [field name]**