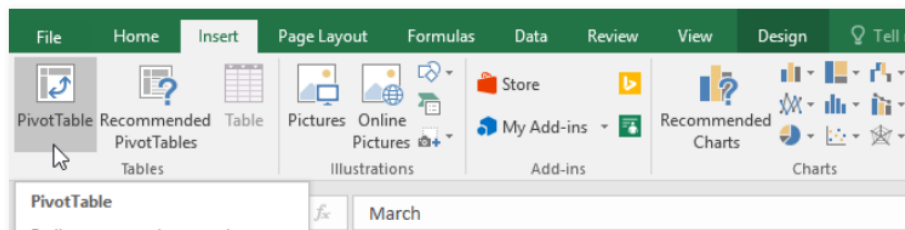


- 1 Select the **table** or **cells** (including column headers) you want to include in your PivotTable.

	A	B	C	D	E
1	Salesperson	Region	Account	Order Amount	Month
2	Albertson, Kathy	East	29386	\$925.00	January
3	Albertson, Kathy	East	74830	\$875.00	February
4	Albertson, Kathy	East	90099	\$500.00	February
5	Albertson, Kathy	East	74830	\$350.00	March
6	Brennan, Michael	West	82853	\$400.00	January
7	Brennan, Michael	West	72949	\$850.00	January
8	Brennan, Michael	West	90044	\$1,500.00	January
9	Brennan, Michael	West	82853	\$550.00	February
10	Brennan, Michael	West	72949	\$400.00	March
11	Davis, William	South	55223	\$235.00	February
12	Davis, William	South	10354	\$850.00	January
13	Davis, William	South	50192	\$600.00	March
14	Davis, William	South	27589	\$250.00	January
15	Dumlao, Richard	West	67275	\$400.00	January
16	Dumlao, Richard	West	41828	\$965.00	February

- 2 From the **Insert** tab, click the **PivotTable** command.



- 3 The **Create PivotTable** dialog box will appear. Choose your settings, then click **OK**. In our example, we'll use **Table1** as our source data and place the PivotTable on a **new worksheet**.

? X

**Create PivotTable**

Choose the data that you want to analyze

**S**elect a table or range

Table/Range:

**U**se an external data source

Connection name:

Use this workbook's Data Model

Choose where you want the PivotTable report to be placed

**N**ew Worksheet

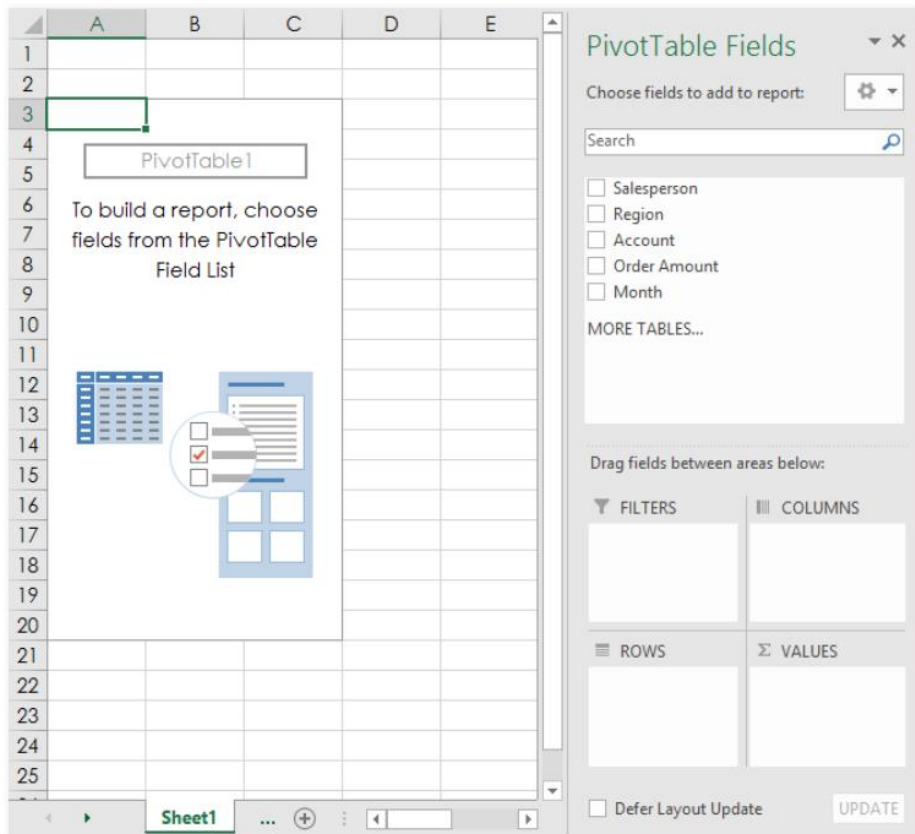
**E**xisting Worksheet

Location:

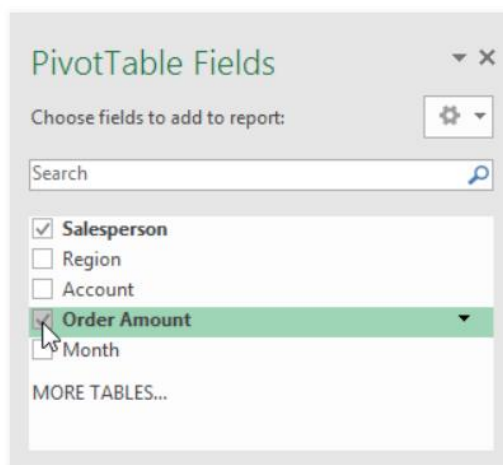
Choose whether you want to analyze multiple tables

Add this data to the Data Model

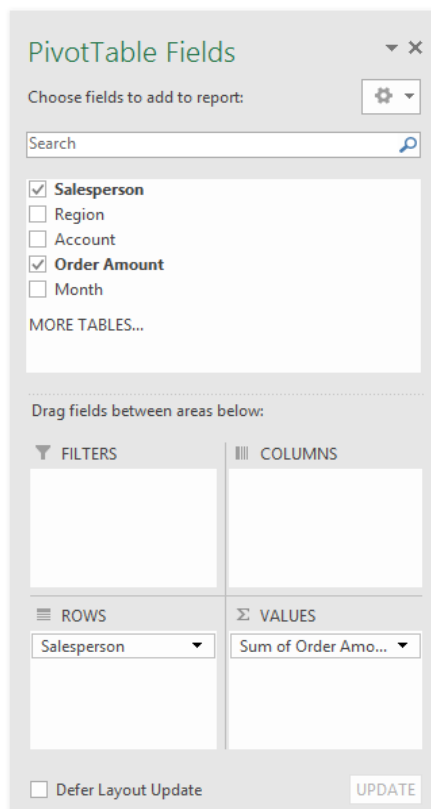
- 4 A blank **PivotTable** and **Field List** will appear on a new worksheet.



- 5 Once you create a PivotTable, you'll need to decide which **fields** to add. Each field is simply a **column header** from the source data. In the **PivotTable Field List**, check the box for each field you want to add. In our example, we want to know the total **amount** sold by each **salesperson**, so we'll check the **Salesperson** and **Order Amount** fields.



- 6 The selected fields will be added to one of the four areas below. In our example, the **Salesperson** field has been added to the **Rows** area, while **Order Amount** has been added to **Values**. Alternatively, you can **drag and drop** fields directly into the desired area.



- 7 The PivotTable will calculate and summarize the selected fields. In our example, the PivotTable shows the **amount sold by each salesperson**.

The screenshot shows an Excel spreadsheet with a PivotTable and the PivotTable Fields task pane. The PivotTable is located in cells A3:B12. The task pane is on the right side of the spreadsheet, showing the same field selection and layout configuration as in the previous screenshot. The PivotTable data is as follows:

Row Labels	Sum of Order Amount
Albertson, Kathy	2650
Brennan, Michael	3700
Davis, William	1935
Dumlaio, Richard	1490
Flores, Tia	4565
Post, Melissa	1690
Thompson, Shannon	3160
Walters, Chris	4375
<b>Grand Total</b>	<b>23565</b>

- ✦ Just like with normal spreadsheets, you can sort the data in a PivotTable using the **Sort & Filter** command on the Home tab. You can also apply any type of **number formatting** you want. For example, you may want to change the number format to **Currency**. However, be aware that some types of formatting may disappear when you modify the PivotTable.

Row Labels	Sum of Order Amount
Flores, Tia	\$4,565.00
Walters, Chris	\$4,375.00
Brennan, Michael	\$3,700.00
Thompson, Shannon	\$3,160.00
Albertson, Kathy	\$2,650.00
Davis, William	\$1,935.00
Post, Melissa	\$1,690.00
Dumlao, Richard	\$1,490.00
<b>Grand Total</b>	<b>\$23,565.00</b>

- ! If you change any of the data in your source worksheet, the PivotTable **will not update automatically**. To manually update it, select the PivotTable and then go to **Analyze**



**Refresh.**

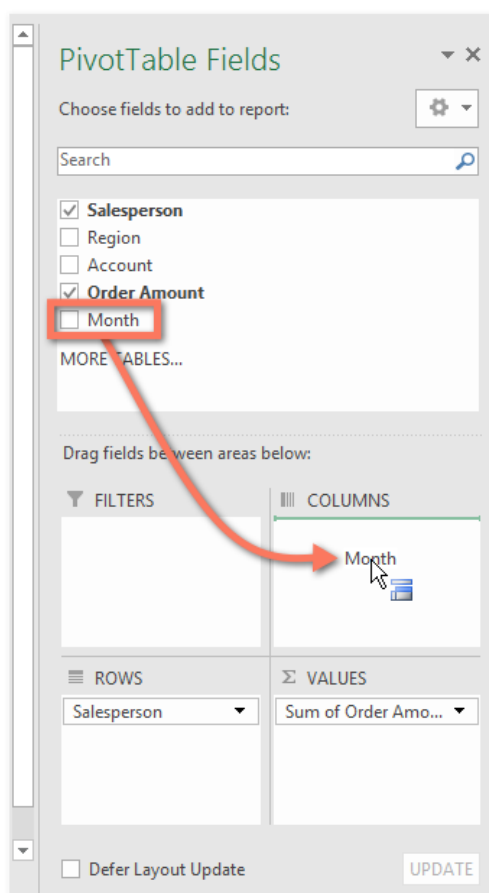
# Pivoting data

One of the best things about PivotTables is that they can quickly **pivot**—or reorganize—your data, allowing you to examine your worksheet in several ways. Pivoting data can help you answer **different questions** and even **experiment** with your data to discover new trends and patterns.

## To add columns:

So far, our PivotTable has only shown **one column** of data at a time. In order to show **multiple columns**, you'll need to add a field to the **Columns** area.

- 1 Drag a field from the **Field List** into the **Columns** area. In our example, we'll use the **Month** field.



- 2 The PivotTable will include multiple columns. In our example, there is now a column for each person's **monthly sales**, in addition to the **grand total**.

	A	B	C	D	E
1					
2					
3		Sum of Order Amount Column			
4	Row Labels	January	February	March	Grand Total
5	Flores, Tia	1655	985	1925	4565
6	Walters, Chris	355	2755	1265	4375
7	Brennan, Michael	2750	550	400	3700
8	Thompson, Shannon	1140	1720	300	3160
9	Albertson, Kathy	925	1375	350	2650
10	Davis, William	1100	235	600	1935
11	Post, Melissa	765	575	350	1690
12	Dumlao, Richard	400	965	125	1490
13	<b>Grand Total</b>	<b>9090</b>	<b>9160</b>	<b>5315</b>	<b>23565</b>
14					
15					
16					
17					
18					
19					
20					
21					
22					

## To change a row or column:

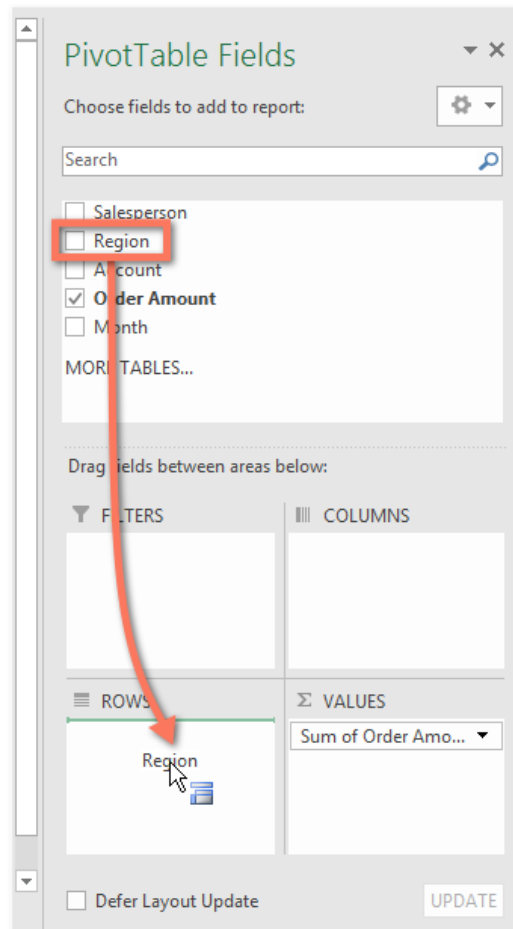
- 1 Drag the field you want to remove out of its **current area**. You can also **uncheck** the appropriate box in the **Field List**. In this example, we've removed the **Month** and **Salesperson** fields.

The screenshot shows the PivotTable Fields task pane with the following configuration:

- Field List:**
  - Salesperson
  - Region
  - Account
  - Order Amount
  - Month (highlighted with a red box)
- Drag fields between areas below:**
  - FILTERS:** (Empty)
  - COLUMNS:** (Empty)
  - ROWS:** Salesperson
  - VALUES:** Sum of Order Amo...

A red arrow points to the 'Salesperson' field in the ROWS area, which is being dragged out of the task pane. The 'Month' field is also being removed, as indicated by the red box around its checkbox in the Field List.

- 2 Drag a **new field** into the **desired area**. In our example, we'll place the **Region** field under **Rows**.



- 3 The PivotTable will adjust—or pivot—to show the new data. In our example, it now shows the **amount sold by each region**.

Row Labels	Sum of Order Amount
East	4340
North	3160
South	10875
West	5190
<b>Grand Total</b>	<b>23565</b>

The screenshot shows the 'PivotTable Fields' task pane. In the 'Choose fields to add to report:' section, the 'Region' checkbox is checked. In the 'Drag fields between areas below:' section, the 'Region' field is in the 'ROWS' area and 'Sum of Order Amo...' is in the 'VALUES' area. The 'FILTERS' and 'COLUMNS' areas are empty.









