

Excel 2019 (Part 26): Introducing PivotTables

PivotTables can help make your spreadsheets more manageable by summarizing data and allowing you to manipulate it in different ways.

When you have a lot of Excel data, it can sometimes be difficult to analyze all the information in a spreadsheet. PivotTables can help make your spreadsheets more manageable by summarizing the data and allowing you to manipulate it in different ways.

Use PivotTables to answer the question.

Consider the following example. Suppose you want to answer the question: How many items did each salesperson sell? Finding the answer can be time-consuming and difficult. Each salesperson's name appears on multiple items, and you need to calculate the total of all their different orders. Using the Subtotal command could help find the total for each salesperson, but there's a lot of data to process.

	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

Fortunately, PivotTables can calculate and summarize data instantly in a way that makes it much easier to read. When complete, a PivotTable will look like this:

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

Once you've created a PivotTable, you can use it to answer various questions by rearranging the data. For example, suppose you want to answer: What is the total sales revenue for each month? You can modify the PivotTable as follows:

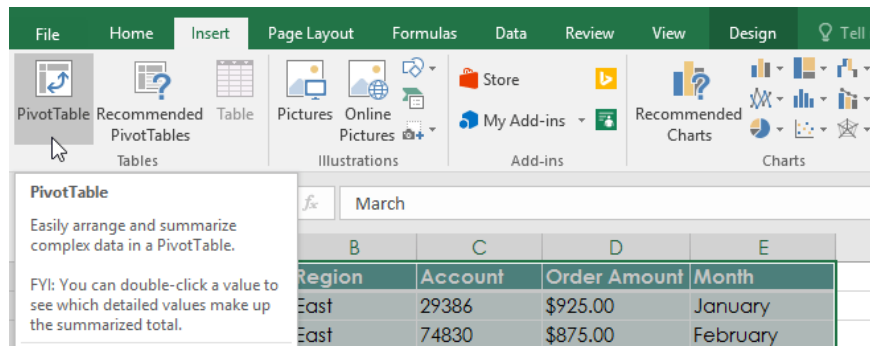
Row Labels	Sum of Order Amount
January	\$9,090.00
February	\$9,160.00
March	\$5,315.00
Grand Total	\$23,565.00

How to create a PivotTable

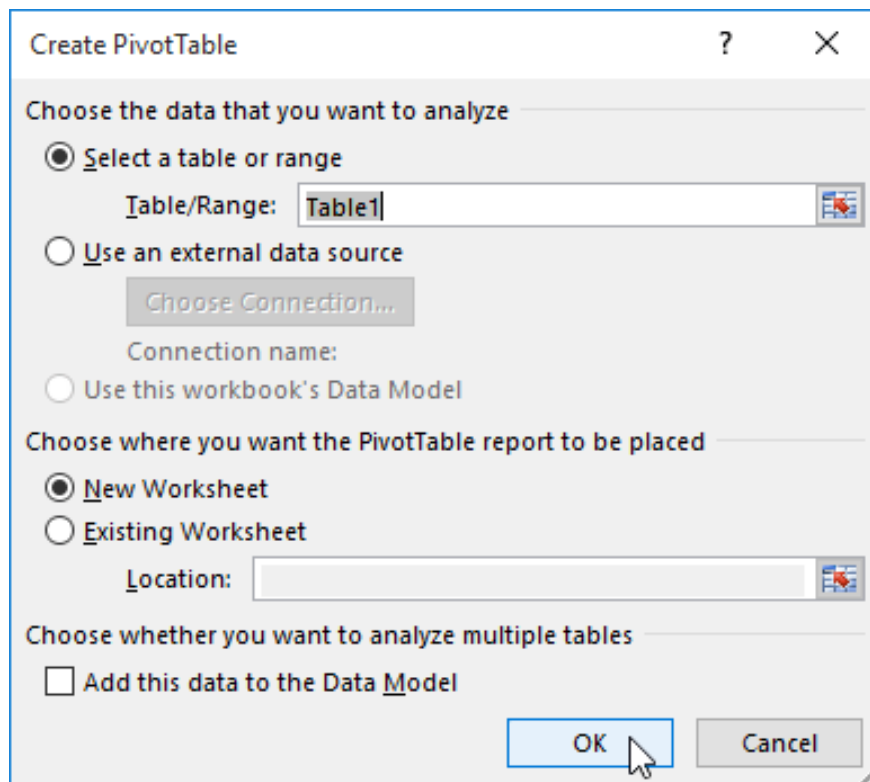
1. Select the table or cells (including column headers) you want to include in your PivotTable.

	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

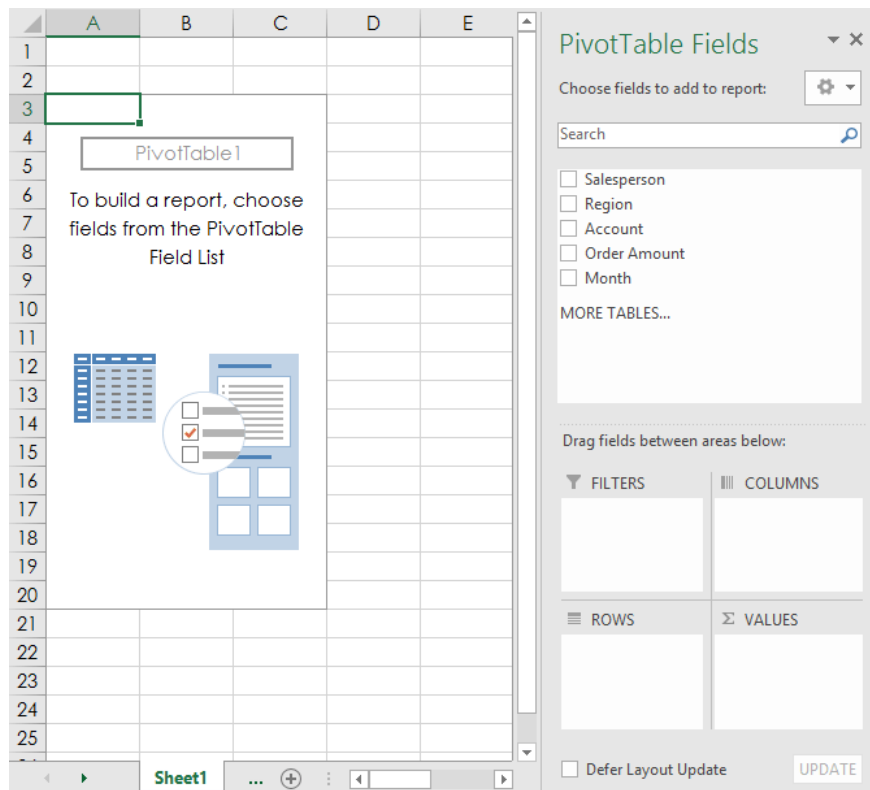
2. From the **Insert** tab , click the **PivotTable** command.



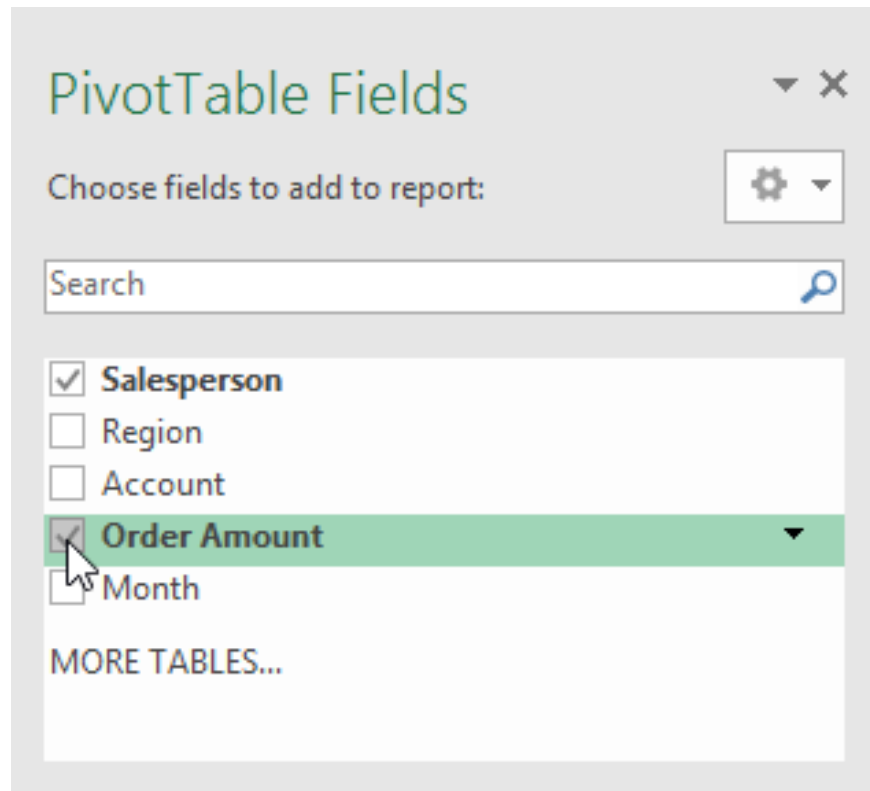
3. The **Create PivotTable** dialog box will appear. Select your settings, then click **OK**. The example will use **Table1** as the data source and place the PivotTable in a new worksheet.



4. Empty **PivotTables** and **Field Lists** will appear in a new worksheet.






5. After creating the PivotTable, you'll need to decide which fields to add. Each field is simply a column header from the source data. In the **PivotTable Fields** list, select the checkbox for each field you want to add. For example, if you want to know the total amount sold by each salesperson, the **Salesperson** and **Order Amount** fields would be selected.



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

PivotTable Fields











Choose fields to add to report:  

Search 

- Salesperson
- Region
- Account
- Order Amount
- Month

MORE TABLES...

Drag fields between areas below:

 FILTERS	 COLUMNS
	
 ROWS	 VALUES
Salesperson 	Sum of Order Amo... 
	

Defer Layout Update UPDATE

7. The PivotTable will calculate and summarize the selected fields. In this example, the PivotTable displays the number of sales made by each salesperson.

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

Just like with regular spreadsheets, you can sort data in a PivotTable using the **Sort & Filter** command on the **Home tab**. You can also apply any number formatting you want. For example, you might want to change the number format to **Currency**. However, keep in mind that some 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
Grand Total	\$23,565.00

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

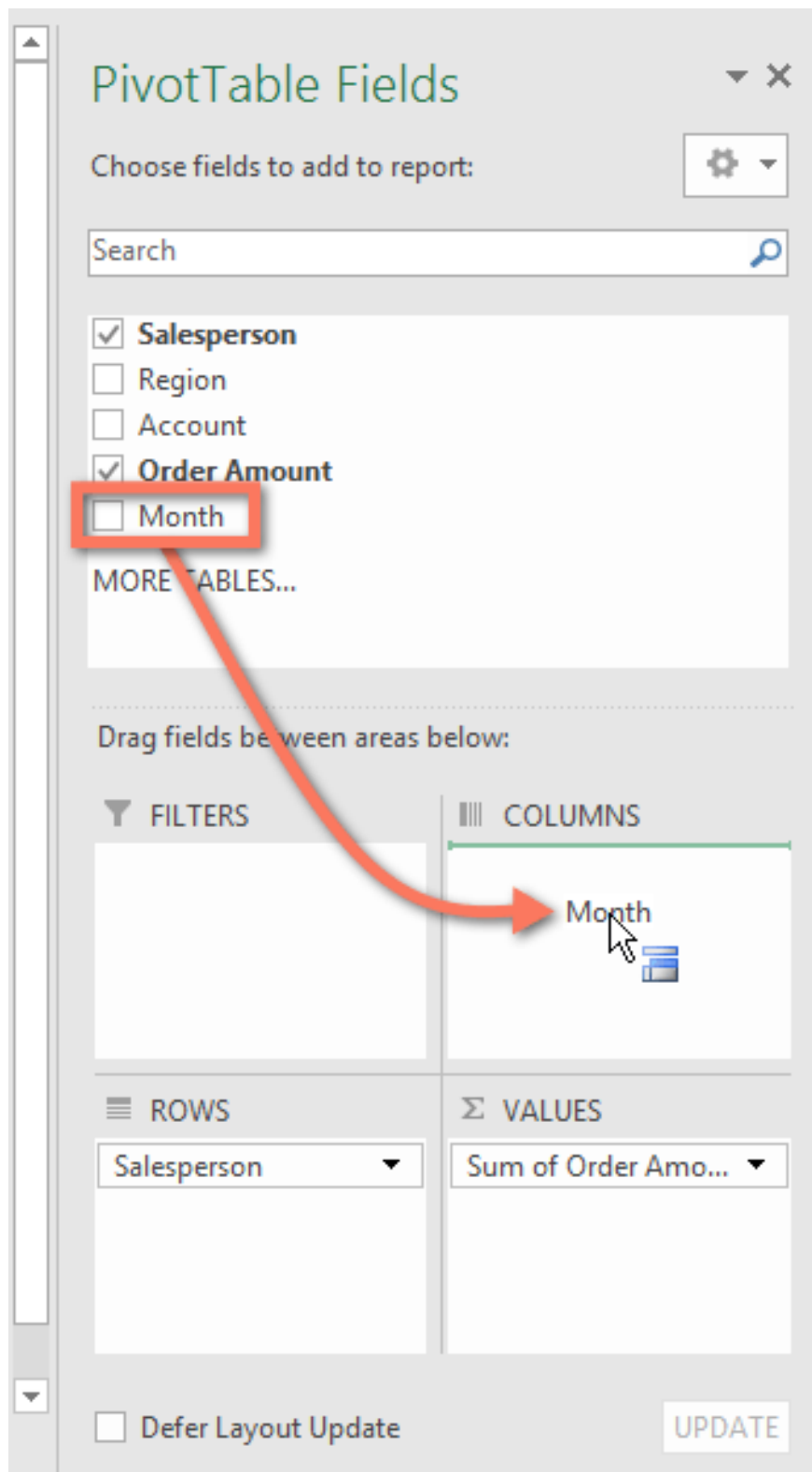
Data rotation

One of the best things about PivotTables is that they can quickly rotate—or reorganize—data, allowing you to examine your spreadsheet in a number of ways. Rotating data can help you answer many different questions and even experiment with the data to discover new trends and patterns.

How to add columns

Until now, PivotTables have only displayed one column of data at a time. To display multiple columns, you need to add fields to the **Columns area**.

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



2. The PivotTable will include multiple columns. In this example, there is now a column for each person's monthly sales, in addition to the 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	Alberison, 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	Grand Total	9090	9160	5315	23565
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					

PivotTable Fields

Choose fields to add to report: ⚙️

Search

Salesperson
 Region
 Account
 Order Amount
 Month

MORE TABLES...

Drag fields between areas below:

FILTERS **COLUMNS**

ROWS **VALUES**

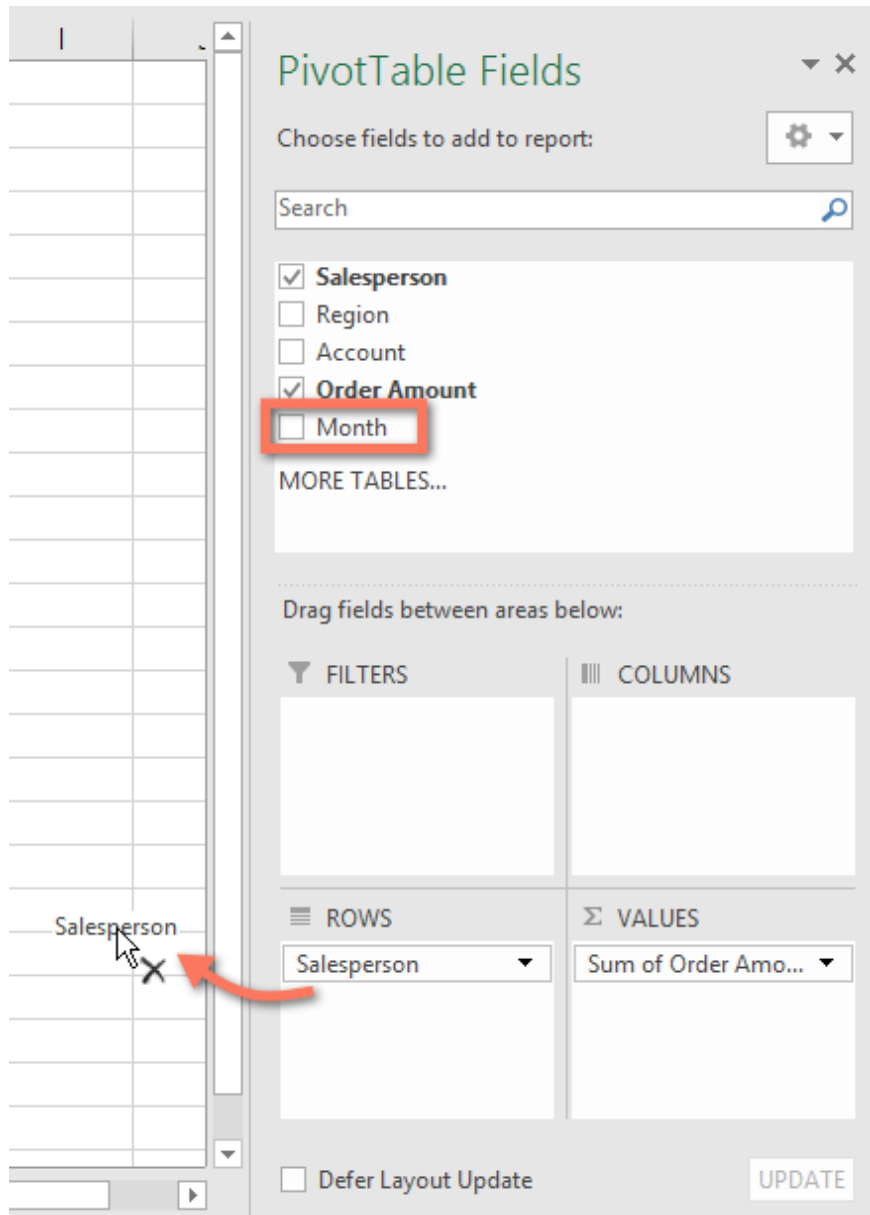
Salesperson ▼ Σ Sum of Order ... ▼

Month ▼

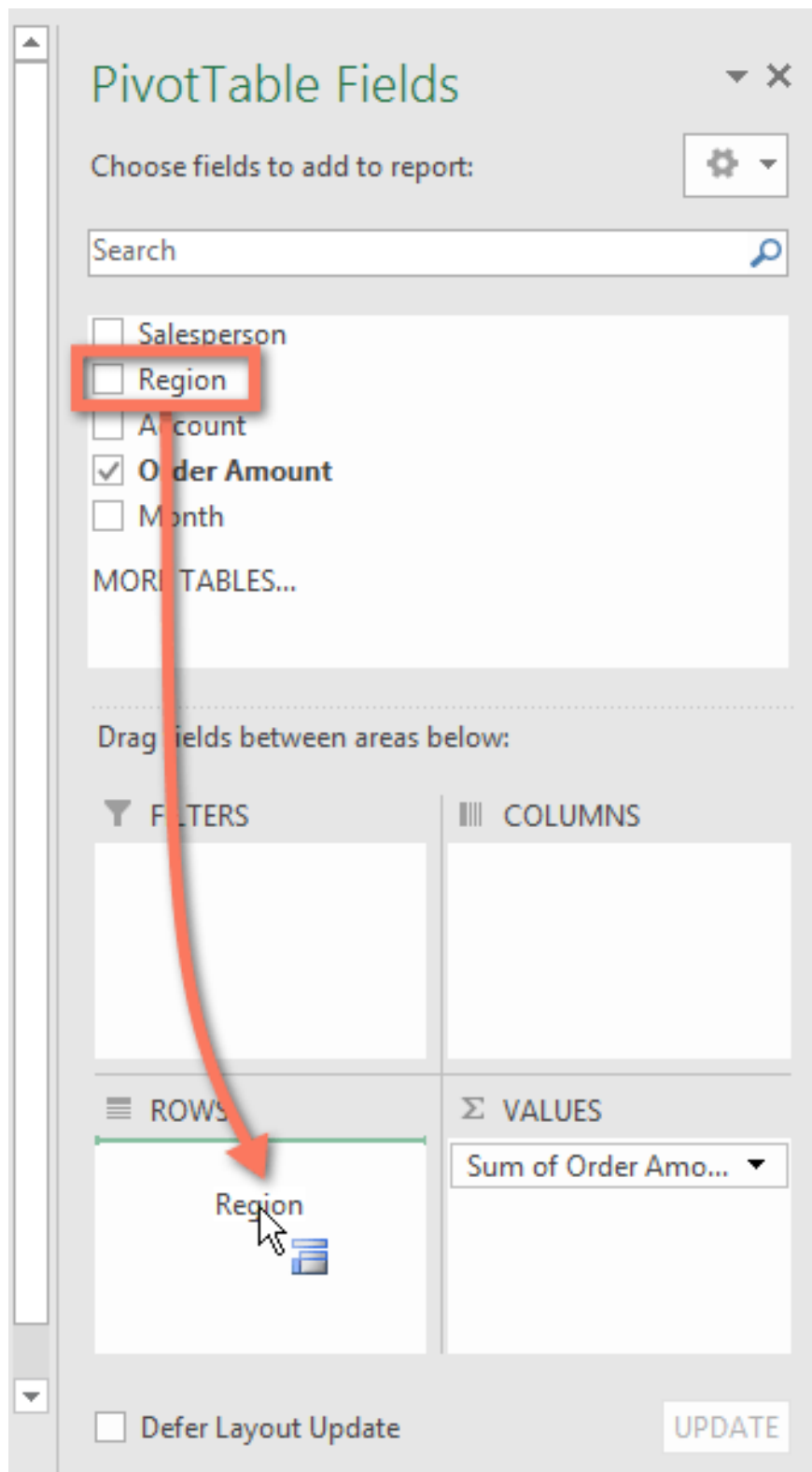
How to change a row or column

Changing a row or column can give you a completely different view of the data. All you have to do is delete the field in question, then replace it with another field.

1. Drag the field you want to delete out of its current location. You can also uncheck the appropriate box in **the Field List**. This example has deleted the **Month** and **Salesperson** fields.



2. Drag a new field into the desired area. For example, this would place the **Region** field in **Rows**.



3. The PivotTable will adjust to display the new data. In this example, the number of items sold by region will be displayed.

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

PivotTable Fields

Choose fields to add to report: [Settings]

Search [Search]

- Salesperson
- Region**
- Account
- Order Amount**
- Month

MORE TABLES...

Drag fields between areas below:

FILTERS | **COLUMNS**

ROWS | **VALUES**

Region | Sum of Order Amo...

You finished reading the article "**Excel 2019 (Part 26): Introducing PivotTables**" edited by the [TipsMake](#) team. We hope this article has provided you with many useful tech tips and tricks. You can search for similar articles on tips and guides. Thank you for reading and for following us regularly.