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What does a PivotTable do?

1. PivotTables create summary reports that contain aggregate calculations with conditions/criteria.
 - i. The words “Conditions”, “Criteria” and “Filter” are all synonyms for adding criteria to the calculations in a PivotTable.
2. Example: Adding Sales based on the criteria “Quad” (Product Field) and “West” (Region Field).

How to create PivotTable:

1. Must have Proper Data Set.
2. Click in one cell in Proper Data Set.
3. Open Create PivotTable dialog box:
 - i. Insert Ribbon Tab, Tables group, PivotTable button
 - ii. Keyboard: **Alt, N, V**

Add conditions to the PivotTable:

1. Row area or Column area:
 - i. From the Field List drag fields to the Row area or the Column area.
 - ii. When you drag a field to the Row area or Column area:
 1. A unique list of items from the field is displayed.
 2. Each one of the items in the unique list becomes a condition or criterion for each of the calculation in the Values area.
 3. Each cell in the Values area has a unique Column Header (criterion) and Row Header (Criterion) that are the criteria for the calculation.
2. Filter or Slicer:
 - i. From the Field List drag fields to the Filter area.
 - ii. Add a Slicer from the PivotTable Tools Analyze Ribbon Tab, Filter group.
 - iii. Filters and Slicers add conditions/criteria/filters to entire report.
 1. All Cells in the Values area use the Condition/Criteria that are selected in the Filter area or Slicer.
3. Slicer:
 - i. To Select Items not next to each other is a Slicer, use the Ctrl Key.
 - ii. To Clear the selected items in the Slicer, use the “Red X” Clear Button in the Upper Right area of the Slicer.
 - iii. Hide Buttons in Slicer when there is no data:
 1. Right-click Slicer and point to “Slicer Settings”, then check the box for: “Hide items with no data.”
 - iv. Connect Multiple PivotTables to a Slicer:
 1. Right-click Slicer and point to “Report Connections” and then check the boxes for the desired PivotTables.

Grouping Daily Dates into Years, Quarters, Months

1. In Excel 2016, when you drag a Date Field into the Row area of a PivotTable, it is automatically grouping into:
 - i. Year
 - ii. Quarter
 - iii. Month
2. In Excel 2013 and earlier versions, to group by month
 - i. drag a Date Field into the Row area of a PivotTable
 - ii. Right-click the date field in the PivotTable
 - iii. Click on Group, Click Month, Click OK

Calculations in a PivotTable:

1. From Field List drag field to Values area:
 - i. The Value area of the PivotTable is where the calculations are made.
 - ii. SUM is the default for Number Values.
 - iii. COUNTA is the default calculation for Text items.
 - iv. The calculation in the Value area is a calculation made based in the conditions in the Row area, Column area or from the Filter/Slicer.
2. To change calculation use:
 - i. Right-click in PivotTable and point to:
 1. Summarize Values by
 - i. Allows you to change function.
 2. Show Values As
 - i. Allows to create a built-in calculation like:
 1. % of Column Total
 2. Difference From.
 - ii. Right-click in PivotTable and point to: Value Field Settings to change:
 1. Name of calculation at top of PivotTable
 2. Aggregate Function
 3. Change Calculation (Show Values As tab)
 4. Change Number Formatting (button)
 5. Change Number Formatting (button)

Name PivotTable:

1. Right-click PivotTable, Select PivotTable Options
2. PivotTable Tools Analyze Ribbon Tab, PivotTable group

Formatting the PivotTable to show Field Names:

1. Design, Report Layout, Show in Tabular Form

Adding Number Formatting to the field, not the cells:

1. Value Field Settings, click on Number Formatting button
2. Right-click in the Values area of PivotTable and click on Number Formatting (Not Format Cells)

PivotTable Styles:

1. PivotTable Tools Design Ribbon Tab, Styles, More button, New PivotTable Style, then use dialog box to create your own style.

Crosstabulation

1. Term used when you have dropped a field into the Row area and the Column area.

Inside the Pivot:

1. Pivot: drag and drop fields in Field List to "Pivot" the report.
2. Filter from dropdown arrows.
3. Sort from dropdown arrows

Create Many PivotTables (One on Each Sheet) with a Single Click:

1. Create PivotTable
2. Drop Field in Filter Area (make sure Filter is showing ALL)
3. PivotTable Tools Analyze Ribbon Tab, PivotTable Group, Options drop-down, Click "Show Report Filter Pages".

PivotTable Example #1: Cross Tabulated Report: Sum of Units Sold with 7 Conditions/Criteria:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Color	Blue										
2												
3	Sum of Units	Region										
4	Product	East	MidWest	South	West	Grand Total						
5	Aspen	10	74	14	67	165						
6	Bellen	77	47	61	51	236						
7	Carlota	39	57	89	56	241						
8	Crested Beaut	42	26	20	77	165						
9	Doublers	7	16	3	42	68						
10	FlatTop	4	34	5	8	51						
11	Majectic Beaut	16	30	51	20	117						
12	Quad	87	112	102	77	378						
13	Sunbell	44	47	20	38	149						
14	Sunset	23	18	25	83	149						
15	Sunshine	76	60	52	49	237						
16	V-Rang	8	12	13	8	41						
17	Grand Total	433	533	455	576	1997						
18												

SalesRep	
Arturo Francis	Beth Tucker
Billie Chandler	Christy Olson
Colleen Warren	Dan Peterson
Drew Rogers	Isabel Cross
Jenny Garcia	Kyle Carr
Mable Lindsey	Pauline Beck
Rachel Gomez	Shari Silva
Sylvester Morales	

PivotTable Example #2: Many PivotTables from a Single Click

	A	B	C	D	E	F
1	Color	Clear				
2						
3	Sum of Units	Region				
4	Product	East	MidWest	South	West	Grand Tot
5	Aspen	107	95	60	181	443
6	Bellen	108	247	154	230	739
7	Carlota	170	275	148	202	795
8	Crested Beaut	56	146	82	200	484
9	Doublers	18	93	15	60	186
10	FlatTop	44	126	16	94	280
11	Majectic Beaut	86	151	84	157	478
12	Quad	227	297	219	355	1,098
13	Sunbell	128	209	106	173	616
14	Sunset	51	227	52	144	474
15	Sunshine	173	376	175	228	952
16	V-Rang	19	63	49	71	202
17	Grand Total	1,187	2,305	1,160	2,095	6,747

	A	B	C	D	E	F
1	Color	Purple				
2						
3	Sum of Units	Region				
4	Product	East	MidWest	South	West	Grand Tot
5	Aspen	52	95	49	30	226
6	Bellen	75	144	62	162	443
7	Carlota	74	130	85	163	452
8	Crested Beaut	22	96	39	82	239
9	Doublers	10	55	43	17	125
10	FlatTop	10	17	33	53	113
11	Majectic Beaut	12	53	63	57	185
12	Quad	108	171	94	131	504
13	Sunbell	42	110	24	135	311
14	Sunset	86	75	40	49	250
15	Sunshine	32	146	75	87	340
16	V-Rang	5	15	18	46	84
17	Grand Total	528	1,107	625	1,012	3,272

	A	B	C	D	E	F
1	Color	Rainbow				
2						
3	Sum of Units	Region				
4	Product	East	MidWest	South	West	Grand Tot
5	Aspen	56	119	56	135	366
6	Bellen	96	308	171	250	825
7	Carlota	214	316	104	223	857
8	Crested Beaut	59	118	83	139	399
9	Doublers	36	62	42	125	265
10	FlatTop	45	71	69	39	224
11	Majectic Beaut	67	249	66	173	555
12	Quad	161	365	140	334	1,000
13	Sunbell	103	207	99	164	573
14	Sunset	33	199	57	169	458
15	Sunshine	133	327	158	225	843
16	V-Rang	28	102	16	42	188
17	Grand Total	1,031	2,443	1,061	2,018	6,553

	A	B	C	D	E	F
1	Color	Red				
2						
3	Sum of Units	Region				
4	Product	East	MidWest	South	West	Grand Tot
5	Aspen	101	218	86	153	558
6	Bellen	242	469	226	355	1,292
7	Carlota	193	426	200	566	1,385
8	Crested Beaut	73	202	153	151	579
9	Doublers	41	125	72	121	359
10	FlatTop	93	117	46	129	385
11	Majectic Beaut	133	341	115	202	791
12	Quad	204	542	325	392	1,463
13	Sunbell	174	440	191	362	1,167
14	Sunset	221	206	103	301	831
15	Sunshine	226	440	291	307	1,264
16	V-Rang	19	94	44	104	261
17	Grand Total	1,720	3,620	1,852	3,143	10,335

PivotTable Example #3: Two Pivot Tables: 1) Product Report with Various Calculations and 2) Group by Month PivotTable with Two Slicers Controlling Both PivotTables:

	A	B	C	D	E	F	G	H
1								
2	<div style="border: 1px solid gray; padding: 5px;"> Color ☰ ✕ </div>				<div style="border: 1px solid gray; padding: 5px;"> Years ☰ ✕ </div>			
3	<div style="border: 1px solid gray; padding: 5px;"> Blue Clear Purple Rainbow Red </div>				<div style="border: 1px solid gray; padding: 5px;"> 2015 2016 </div>			
4								
5								
6								
7	Product	Total Revenue (\$)	Count Transactions	Ave Revenue (\$)	Date	Total Revenue (\$)	% Rev of Total	
8	Aspen	5,072	65	78.03	Jan	3,657	4.13%	
9	Bellen	8,792	130	67.63	Feb	4,263	4.82%	
10	Carlota	8,357	116	72.04	Mar	1,743	1.97%	
11	Crested Beaut	4,451	57	78.09	Apr	2,272	2.57%	
12	Doublers	10,209	39	261.77	May	3,056	3.45%	
13	FlatTop	4,035	38	106.19	Jun	2,380	2.69%	
14	Majectic Beaut	6,760	66	102.42	Jul	2,464	2.78%	
15	Quad	18,976	150	126.51	Aug	1,563	1.77%	
16	Sunbell	6,399	85	75.28	Sep	4,004	4.52%	
17	Sunset	5,864	64	91.63	Oct	3,486	3.94%	
18	Sunshine	7,732	115	67.24	Nov	29,982	33.87%	
19	V-Rang	1,872	32	58.51	Dec	29,648	33.49%	
20	Grand Total	88,519	957	92.50	Grand Total	88,519	100.00%	
21								

PivotTable Example #4: Change per Period & Running Total Report:

	A	B	C	D	E	F	G	H	I	J
1										
2	Date	Total Rev (\$)	Change	% Change	Running Total	% Running Total				
3	Jan	2,920			2,920	3.25%				
4	Feb	2,468	-451	-15.46%	5,388	6.00%				
5	Mar	2,113	-355	-14.40%	7,501	8.36%				
6	Apr	3,064	951	45.03%	10,565	11.77%				
7	May	1,512	-1,553	-50.67%	12,077	13.45%				
8	Jun	1,669	158	10.44%	13,746	15.31%				
9	Jul	2,323	654	39.15%	16,069	17.90%				
10	Aug	1,221	-1,102	-47.43%	17,290	19.26%				
11	Sep	2,006	785	64.24%	19,296	21.49%				
12	Oct	3,675	1,670	83.23%	22,972	25.59%				
13	Nov	32,013	28,338	771.03%	54,985	61.25%				
14	Dec	34,786	2,773	8.66%	89,771	100.00%				
15	Grand Total	89,771								
16										

Years
☰ ✕

2015
2016

Color
☰ ✕

Blue

Clear

Purple

Rainbow

Red

List of Keyboards:

- 1) **Esc Key:**
 - i. Closes Backstage View (like Print Preview).
 - ii. Closes most dialog boxes.
 - iii. If you are in Edit mode in a Cell, Esc will revert back to what you had in the cell before you put the Cell in Edit mode.
- 2) **F2 Key** = Puts formula in Edit Mode and shows the rainbow colored Range Finder.
- 3) **SUM Function: Alt + =**
- 4) **Ctrl + Shift + Arrow** = Highlight column (Current Region).
- 5) **Ctrl + Backspace** = Jumps back to Active Cell
- 6) **Ctrl + Z** = Undo.
- 7) **Ctrl + Y** = Undo the Undo.
- 8) **Ctrl + C** = Copy.
- 9) **Ctrl + X** = Cut.
- 10) **Ctrl + V** = Paste.
- 11) **Ctrl + PageDown** =expose next sheet to right.
- 12) **Ctrl + PageUp** =expose next sheet to left.
- 13) **Ctrl + 1** = Format Cells dialog box, or in a chart it opens Format Chart Element Task Pane.
- 14) **Ctrl + Arrow:** jumps to the bottom of the "**Current Region**", which means it jumps to the last cell that has data, right before the first empty cell.
- 15) **Ctrl + Home** = Go to Cell A1.
- 16) **Ctrl + End** = Go to last cell used.
- 17) Alt keyboards are keys that you hit in succession. Alt keyboards are keyboards you can teach yourself by hitting the Alt key and looking at the screen tips.
 - i. Create PivotTable dialog box: **Alt, N, V**
 - ii. Page Setup dialog box: **Alt, P, S, P**
 - iii. Keyboard to open Sort dialog box: **Alt, D, S**
- 18) **ENTER** = When you are in Edit Mode in a Cell, it will put thing in cell and move selected cell DOWN.
- 19) **CTRL + ENTER** = When you are in Edit Mode in a Cell, it will put thing in cell and keep cell selected.
- 20) **TAB** = When you are in Edit Mode in a Cell, it will put thing in cell and move selected cell RIGHT.
- 21) **SHIFT + ENTER** = When you are in Edit Mode in a Cell, it will put thing in cell and move selected cell UP.
- 22) **SHIFT + TAB** = When you are in Edit Mode in a Cell, it will put thing in cell and move selected cell LEFT.
- 23) **Ctrl + T** = Create Excel Table (with dynamic ranges) from a Proper Data Set.
 - i. Keyboard to name Excel Table: **Alt, J, T, A**
 - ii. **Tab** = Enter Raw Data into an Excel Table.
- 24) **Ctrl + Shift + ~ (`)** = General Number Formatting Keyboard.
- 25) **Ctrl + ;** = Keyboard for hardcoding today's date.
- 26) **Ctrl + Shift + ;** = Keyboard for hardcoding current time.
- 27) **Arrow Key** = If you are making a formula, Arrow key will "hunt" for Cell Reference.
- 28) **Ctrl + B** = Bold the Font
- 29) **Ctrl + * (on Number Pad) or Ctrl + Shift + 8** = Highlight Current Table.
- 30) **Alt + Enter** = Add Manual Line Break (Word Wrap)
- 31) **Ctrl + P** = Print dialog Backstage View and Print Preview
- 32) **F4 Key** = If you are in Edit mode while making a formula AND your cursor is touching a particular Cell Reference, F4 key will toggle through the different Cell References:
 - i. **A1** = Relative
 - ii. **\$A\$1** = Absolute or "Locked"

- iii. **A\$1** = Mixed with Row Locked (Relative as you copy across the columns AND Locked as you copy down the rows)
 - iv. **\$A1** = Mixed with Column Locked (Relative as you copy down the rows AND Locked as you across the columns)
- 33) **Ctrl + Shift + 4** = Apply Currency Number Formatting
- 34) **Tab key** = When you are selecting a Function from the Function Drop-down list, you can select the function that is highlighted in blue by using the Tab key.
- 35) **F9 Key** = To evaluate just a single part of formula while you are in edit mode, highlight part of formula and hit the F9 key.
- i. If you are creating an Array Constant in your formula: Hit F9.
 - ii. If you are evaluating the formula element just to see what that part of the formula looks like,
REMEMBER: to Undo with Ctrl + Z.
- 36) **Alt, E, A, A** = Clear All (Content and Formatting)
- 37) Evaluate Formula One Step at a Time Keyboard: **Alt, M, V**
- 38) Keyboard to open Sort dialog box: **Alt, D, S**
- 39) **Ctrl + Shift + L** = Filter (or **Alt, D, F, F**) = Toggle key for Filter Drop-down Arrows
- 40) **Ctrl + N** = Open New File
- 41) **F12** = Save As (Change File Name, Location, File Type)
- 42) Import Excel Table into Power Query Editor: **Alt, A, P, T**
- 43) **Ctrl + 1 (When Chart element in selected)**: Open Task Pane for Chart Element
- 44) **F4 Key** = If you are in Edit mode while making a formula AND your cursor is touching a particular Cell Reference, F4 key will toggle through the different Cell References:
- i. **A1** = Relative
 - ii. **\$A\$1** = Absolute or "Locked"
 - iii. **A\$1** = Mixed with Row Locked (Relative as you copy across the columns AND Locked as you copy down the rows)
 - iv. **\$A1** = Mixed with Column Locked (Relative as you copy down the rows AND Locked as you across the columns)
- 45) Keyboard to open Scenario Manager = **Alt, T, E**
- 46) **Ctrl + Tab** = Toggle between Excel Workbook File Windows
- 47) **Ctrl + Shift + F3** = Create Names From Selection
- 48) **Ctrl + F3** = open Name Manager
- 49) **F3** = Paste Name or List of Names
- 50) **Alt + F4** = Close Active Window
- 51) **Window Key + Up Arrow** = Maximize Active Window