



# Create Pivot Tables

## Session: Create Pivot Tables

### Using Filters in Pivot Table:

1. By Inserting one or more slicer  
Select the PivotTable > Options > Insert Slicer > Select the field to be sliced
2. Using auto filter
3. By adding filters to Pivot filter field

Q1. Explain the three methods of filtering data.

A1. There are multiple methods to filter data effectively by inserting one or more slicer, using auto filter, or by adding filters to Pivot filter field.

Q2. Pivot tables help to handle large data. True or False?

A2. True

Q3. In the Pivot Table drop-down, what field will you select to view Top 10?

A3. Click Value filters.

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### Steps to show Top 10 and Bottom values in Pivot table:

1. In the Pivot table, click the drop-down arrow.
2. In the pop-up menu, click Value Filters and then click Top 10.
3. Add details to the field and click OK.

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### Create Pivot Tables from Cell Ranges:

1. Take an empty Pivot table.
2. Drag fields into one of the Columns, Rows or Values area.
3. Select Row field and Value field in the PivotTable Fields pane.

Q: What is the advantage of Value field setting?

A: By using different 'Value Field Settings', the data in the field presented under 'Values' can be presented in different ways.

### Sort Data by Value:

1. Right-click any sales value and choose Sort > Largest to Smallest.
2. Excel now lists the top-selling colours first.

Q: What is the difference between filter and sorting data?

A: When you sort data, you are putting it in order. Filtering data lets you hide unimportant data and focus only on the data you are interested in.

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### Refresh Data in Pivot table:

1. Select Cell F5 and change \$11.00 to \$2000.
2. Right-click anywhere in the Pivot table and select "Refresh".
3. Notice "Red" is now the top-selling colour and automatically moves to the top.
4. Change F5 back to \$11.00 and refresh the Pivot table again.

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### **Create Pivot table from Multiple sheets:**

1. Press Alt + D + P to make the 'PivotTable and PivotChart Wizard' appear. Under "Where is the data you want to analyze?" option, select the radio button for "Multiple consolidation ranges" and then click 'Next'.
2. Select the radio button "I will create the page fields" and click 'Next'.
3. Select your first data range and type in name for the 'page field'.  
In Step 3 of the wizard, leave the default setting as 'New worksheet'.  
Click Finish.

Q. What is the advantage of single Pivot table for multiple sheets?

A: Large data can be visible on one page and analysed easily.

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### **Group Data in Columns and Rows for Aggregate Reports:**

Analyze > Group Selection > In the Grouping dialog box > Specify Starting at, Ending at, and By values > Click OK.

### **Steps to include Grouped values for Headers:**

1. Clear up the Report Editor by removing the existing fields in Rows and Values.
2. Add resolution as a field to the Rows section.
3. Add a field to Values (any column).
4. Switch the summarising function to COUNTA.
5. In the Columns section, add the descript field.

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**Recap:**

In this module, you have learnt that:

- A Pivot Table is a quick and easy tool within Excel that helps users to summarise data.
- Data can be grouped, summarised and displayed in various forms as per the need of the business. The various features of Pivot Table can be used to:
  1. View the same data from different perspectives
  2. Create Pivot tables from cell ranges, multiple sheets
  3. Group data into categories
  4. Break down data into years and months
  5. Sort data
  6. Group data by date
- Pivot Tables can apply and maintain number formatting automatically to numeric fields.
- Slicers offer a more intuitive way to filter and organise the data within a Pivot Table.
- Data can be filtered to include or exclude categories.
- Filters can be created using Autofilter, report filters or slicers.
- Filters can be created for multiple items.
- Different report filters can be created, such as top 10 filters and bottom 10 filters.
- Aggregations are a way of collapsing, summarising or grouping data.
- Functions such as sum, average, minimum, count and more can be used for aggregations. Customised aggregations can also be used.
- You can group data in the following ways:
  1. Group by value
  2. Group by date
  3. Group data manually