

Lesson 5-1: Create a one dimensional pivot table report from a table

In this lesson, you'll jump straight into the deep end and create a simple one-dimensional pivot table. There's a huge amount to learn about pivot tables but it will be fun to do some useful work with one straight away.

Here's the sample file we'll use in this lesson:

	A	B	C	D	E	F	G	H
1	Order No	Order Date	Customer	Employee	Title	Genre	Qty	Total
2	136438	01-Oct-07	Silver Screen Video	Lee, Frank	Lawrence of Arabia	Biography	15	122.76
3	136438	01-Oct-07	Silver Screen Video	Lee, Frank	The Discreet Charm of the Bourgeoisie	Comedy	9	67.46
4	136438	01-Oct-07	Silver Screen Video	Lee, Frank	Berlin Alexanderplatz	Drama	25	250.60
5	136438	01-Oct-07	Silver Screen Video	Lee, Frank	Gone With The Wind	Drama	14	107.72
6	136439	02-Oct-07	Cinefocus DVD	Diamond, Elizabeth	Mouchette	Drama	5	31.77

This is the type of worksheet that pivot tables can work well with because the columns contain repeating data.

The sample file contains over 2,000 rows of transactional data listing sales during the 18 month period from October 2007 to March 2009 inclusive.

You can see from the data that the worksheet contains details of orders sold by a DVD wholesaler, along with the titles supplied on each order. Order 136438 was placed on 1st-Oct-07 and was ordered by Silver Screen Video. The order was sold by Frank Lee and there were four items on the order. Two of the films ordered were in the Drama genre and the other two were in the Biography and Comedy genres.

A business may wish to ask several questions about sales during this period such as:

- What were my sales by Genre?
- How many units did each Employee sell?

In this lesson, you'll use a pivot table to answer both questions in less than 10 seconds!

1 Open Transactions-1 from your sample files folder.

This worksheet contains a large table named *Data* (see sidebar for more on using tables with Pivot Tables). The table looks like a regular range because it has had its *Filter* switched off and the *Table Style* set to *None*.

2 Click anywhere inside the table.

3 Click Insert→Tables→Pivot Table.

The first screen of the wizard appears.

Notice that, because you clicked inside the table, it has automatically detected the table's name of *Data*.

important

Pivot Tables, Ranges, Named Ranges and Tables

You can create a Pivot Table that is associated with a *Range*, a *Named Range* or a *Table*.

The fatal flaw of named ranges is that they only expand and contract when rows are *inserted* or *deleted* and NOT when data is added to the end of the range. You discovered a work-around to this problem in:

Lesson 4-6: Create dynamic formula-based range names using the OFFSET function.

Fortunately, Excel 2007 has the fantastic new *Table* structure.

Tables are wonderful to use as a data source for Pivot Tables because they are truly dynamic. You learned everything there is to know about tables in: *Session One: Tables, Ranges and Databases.*

Transactions-1

note

Drilling down into pivot table data

Whenever Excel shows a total, it is possible to “drill down” to see the transactions that were used to calculate the total.

When you double-click on a total, (such as the total sales for action movies in cell C5), a new worksheet opens showing the source transactions.

You’ll have to manually delete this worksheet after viewing the transaction list.

note

Activating a pivot table

Pivot tables are a little like charts in that you cannot work upon their design unless they are activated.

To activate, you simply click anywhere inside the pivot table.

When the pivot table is activated, the *PivotTable Field List* appears along with the *PivotTable Tools* tab on the Ribbon.

	A	B
3	Row Labels	Sum of Qty
4	Anderson, Jane	1109
5	Armstrong, Dan	1000
6	Ashe, Lucille	1116
7	Bell, Stephen	1409
8	Bradshaw, John	1196
9	Carrey, Julia	770
10	Davis, Charles	839
11	Diamond, Elizabeth	1153
12	Goodman, Paul	1163
13	Hawking, Alfred	1386
14	Hicks, Michael	921

4 Click the OK button.

An empty pivot table is shown on screen and the *PivotTable Field List* appears on the right of the screen.

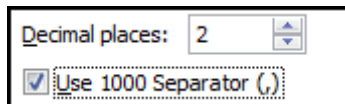
Check the *Genre*, *Qty* and *Total* check boxes (in that order) on the *PivotTable Field List*.

Simply by clicking on three fields you have answered the first question:

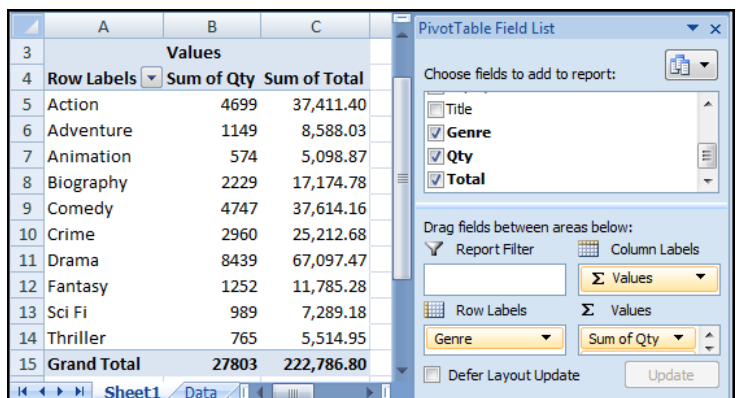
- What were my sales by *Genre*?

5 Format the values shown in column C of the pivot table so that they show two decimal places with a comma separator.

1. Right-click on any value in column C.
2. Click *Number Format...* on the shortcut menu.
3. Click *Number* in the *Category* list.
4. Click the *Use 1000 Separator* check box.



5. Click the OK button.



6 Clear all check boxes and then select the *Employee* and *Qty* check boxes.

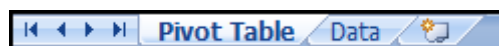
Once again, with very little effort, you have answered the second question:

- How many units did each *Employee* sell?

7 Name the pivot table: *Transactions*.

1. Click inside the Pivot Table.
2. Click *PivotTable Tools* → *Options* → *PivotTable* → *PivotTable Name*.
3. Type **Transactions** into the *PivotTable Name* box.

8 Name the pivot table worksheet: *Pivot Table*.



9 Save your work as *Transactions-2*.