

Lesson 8

Lesson 8

Creating PivotTables to Summarize Data

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Learn how to:

- ◆ Import a text file
- ◆ Create a PivotTable
- ◆ Modify a PivotTable
- ◆ Update a PivotTable

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Getting External Data

- ◆ You can import data into Excel from external (non-Excel) sources, such as a text file
- ◆ Text files could be delimited files (columns are separated by commas, or tabs etc) or fixed width files (each column is of a fixed width). To import
 - ✓ click the file open option.
 - ✓ In the files of type box select “Text files”
 - ✓ double click on the text file name
 - ✓ the text import wizard appears and guides you through the process

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Pivot Table

- ◆ A pivot table combines the best of the two options to summarize data: Consolidate and Subtotal
- ◆ It is an interactive table that quickly summarizes and cross-tabulates.
- ◆ You can easily change rows into columns and vice-versa, show or hide information etc.

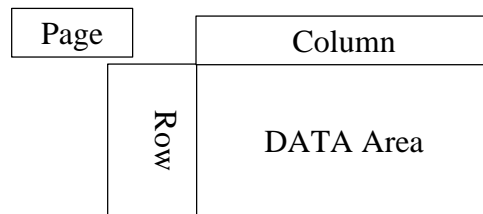
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PivotTable parts

- ◆ A PivotTable has 4 basic parts
 - ✓ Row field: where you define which fields are listed in rows
 - ✓ Column field: where you define which of the fields are to be listed across in columns
 - ✓ Page field: where you define the field, whose contents should appear each on a separate page
 - ✓ Data field: Where you define which data needs to be summarized (using functions like sum, average, count etc.)



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Creating a Pivot Table

- ◆ Click on any cell in the data list, and click PivotTable under the Data menu. The PivotTable wizard appears
- ◆ In step 1 chose “Microsoft Excel List or Database”
- ◆ Step 2: Excel selects the range for the PivotTable. Just check to see that the range is correct
- ◆ Step 3: shows the PivotTable layout. Drag the fields shown on the right side, into the appropriate location (Row, Column, Page, or Data)
- ◆ For the Data field the default function is SUM. To choose another function, double click on the button “SUM of ...”
- ◆ Step 4: choose “New Worksheet” and click Finish

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Grouping in Pivot Table

- ◆ You can group the date field to show the information grouped by month, quarter, etc.
 - ✓ right click on any cell in the date column on your PivotTable
 - ✓ Choose “Group & Outline” and then choose “Group” from the shortcut
 - ✓ From the grouping dialog box choose the grouping option

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Modifying the PivotTable

- ◆ Modifying the PivotTable is very easy
 - ✓ right click on any cell in the PivotTable
 - ✓ Clicking on Wizard (on the shortcut menu) takes you to the PivotTable layout (step 3 of the Wizard)
 - ✓ Make any changes you desire (eg. Move row fields into columns, column field into row etc.)
 - ✓ click Finish

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Modifying the PivotTable

- ◆ You can also make some changes directly on the PivotTable without going through the wizard and Table layout
- ◆ Example
 - ✓ if you want to move a field in row to column, just click on the field button in row and drag it into the column area. As you drag, the icon shapes change to indicate what will happen
 - ✓ Refer page 136 in textbook for the icon shapes

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Changes in Data and Refreshing

- ◆ When any data in the original source worksheet changes, you can refresh the PivotTable to reflect those changes
 - ✓ after making changes in the original worksheet, right click on any cell in the PivotTable
 - ✓ on the shortmenu, click “Refresh Data”. That’s it, all changes are reflected

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