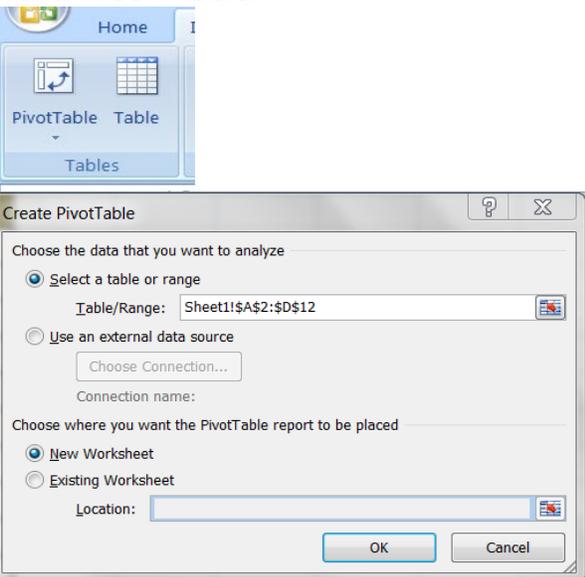
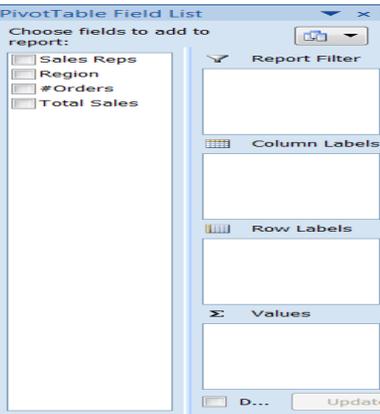


Excel 4
 Microsoft Excel 2013

Action	Technique
<p>1. Create a Pivot Table</p> 	<p>A pivot table is a reporting tool that allows you to dynamically sort, sum, and filter data. Pivot tables don't change the actual spreadsheet itself; they pivot or turn the data so that you can see it from different perspectives.</p> <p>In order to create a pivot table, you must create data. The data should be in the form of a table without any blank rows or columns.</p> <p>After you've created the data, select the rows and columns that contain the data that you want to use in the pivot table.</p> <p>Select the insert tab. In the tables group, click on the arrow under the PivotTable command and choose pivot table.</p> <p>This will bring up the create PivotTable dialogue box. Under select a table or range, the rows and columns you've highlighted will be displayed. You must then "Choose where you want the PivotTable to be placed." If you click the radio button "New Worksheet," then the PivotTable will be placed in a new worksheet. If you choose "Existing Worksheet," the pivot table will be placed in the same worksheet as your table, and you must type the cell location in the "Location" box. When you click OK, then Excel will place a blank pivot table in the location you chose.</p>
<p>2. Adding data to the pivot table.</p> 	<p>At the top of the pivot table field list are the field names (column headings) from your data table. The data areas at the bottom of the panel are linked to the pivot table.</p> <p>There are two ways to add data to a pivot table. You can place check marks in the boxes next to the fields list. That will place any field with labels or words in rows, and any field with numerical data in columns.</p> <p>You can also manually drag fields to data areas. Drag columns from the PivotTable Field List pane and drop them into one of the four boxes. As you work, Excel generates the pivot table, updating it dynamically as you add, rearrange, or remove columns.</p>

In the example to the left, if you drag sales rep to the row labels field, then sales rep will appear in your pivot table as a row. If you drag region to the column labels data area, then region will appear as a column in your pivot table. If you drag orders into the values data area, then orders will appear as a total in your pivot table. Finally, if you drag total sales into the report data area, then total sales will appear in your pivot table as a filtered report.

3. Filtering the Pivot Table

Once your pivot table has data, you can filter and reorder the pivot table. For example, if you wish to change the pivot table on the left and have it display the order totals for just the east & north regions: You click the pull down arrow next to the column labels for regions. You uncheck select all. Then you check east & north. Click OK and the pivot table will only show order totals for the east & north regions.

To reset the pivot table to show all regions, click on the pull down arrow next to column labels & reselect "select all" to show sales for all the regions.

You can also filter your pivot table by person or multiple persons by clicking the pulldown arrow next to row labels.

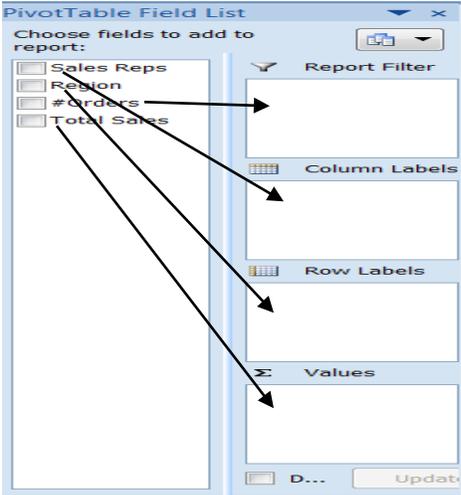
You can filter your pivot table to rank salesperson by sales.

Total Sales	(All)				
Sum of #Orders	Column Labels				
Row Labels	East	North	South	West	Grand Total
Bill				217	217
Frank				268	268
Harry	224				224
Janet	286				286
Joe		226			226
Martha	228				228
Mary			234		234
Ralph	267				267
Sam	279				279
Tom			261		261
Grand Total	774	510	487	719	2490

4. Change the Pivot Table data.

The advantage to pivot tables is that they allow you to pivot and rearrange data. If you drag field names to different data areas that will rearrange how the data is displayed.

If you take as an example the pivot table to the left. You can drag the orders to the report filter, drag the sales rep to the column labels, and drag the total sales to the values area the data will display differently, as shown in the below graphic.



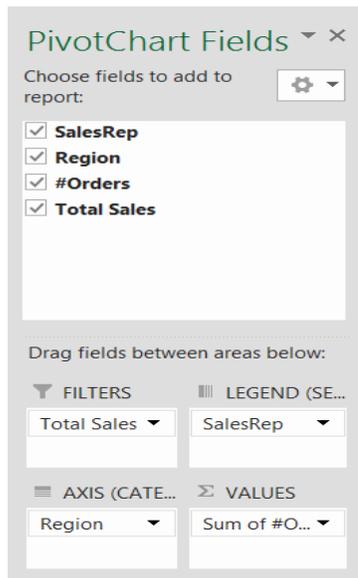
#Orders	(All)										
Sum of Total Sales	Column Labels										
Row Labels	Bill	Frank	Harry	Janet	Joe	Martha	Mary	Ralph	Sam	Tom	Grand Total
East						49017		70702	77738		197457
North			41676	87858							129534
South					45606					69496	115102
West		41107	72707				57967				171781
Grand Total	41107	72707	41676	87858	45606	49017	57967	70702	77738	69496	613874

5. Add a PivotChart



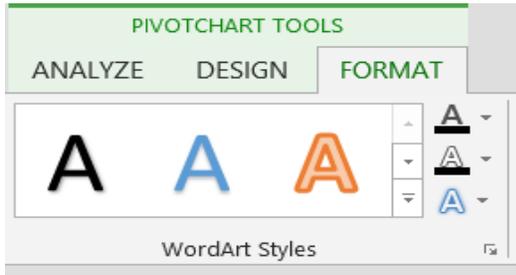
In order to create a pivot chart, you must create data. The data should be in the form of a table without any blank rows or columns. After you've created the data, select the rows and columns that contain the data that you want to use in the pivot chart. Select the insert tab. In the Charts group, click on the arrow under the PivotChart command and choose PivotChart. This will bring up the Create PivotChart dialogue box. Under "Select a table or range," the rows and columns you've highlighted will be displayed. You must then "Choose where you want the PivotTable to be placed." If you click the radio button "New Worksheet," then the PivotChart will be placed in a new worksheet. If you choose "Existing Worksheet," the PivotChart will be placed in the same worksheet as your table, and you must type the cell location in the "Location" box. When you click OK, then Excel will place a blank PivotChart in the location you chose.

6. Building a PivotChart



Building a PivotChart is similar to building a PivotTable. You drag fields into four areas: Filters, Legend, Axis, and Values. Excel changes the names of the sections of your PivotChart field list to help you understand how different parts of your PivotTable are used to create a chart. The "Legend" and "Axis" fields are generally used for labels to identify the numbers in your chart. "Values" is similar to the values section in a chart; it sums or totals the numerical data. "Filters" allows you to limit or filter the data.

7. Format the PivotChart.



Formatting a PivotChart is similar to formatting a basic chart. You select the chart by clicking on it. Once you have clicked on the chart three contextual tabs will appear: **Analyze**, **Design**, & **Format** with all the tools you will need to format the chart's appearance.

From the **Design** tab you can:

- Add/change Chart Title and Axis Titles.
- Add/change a Legend.
- Add/change Data Labels.
- Move the Chart to another sheet.
- Change the Chart Type.
- Save the chart as a Template.
- Switch the Row/Column data.
- Add Quick Styles to change the appearance of the chart and apply a predefined chart style.

From the **Format** tab you can:

- Change the visual style of your chart.
- Fill the selected shape with a solid color, gradient, picture or texture.
- Change the outline of chart elements by changing the line styles and colors.
- Add Shape Effects such as 3-D rotation, Bevel, Shadow or a Glow.

From the **Analyze** tab you can:

- Move Chart
- Show/Hide the Field List and Field Buttons