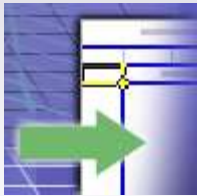


NCI Technologies presents:

# Microsoft® Office Excel® 2003 Training



**What's so great about  
PivotTable reports?**

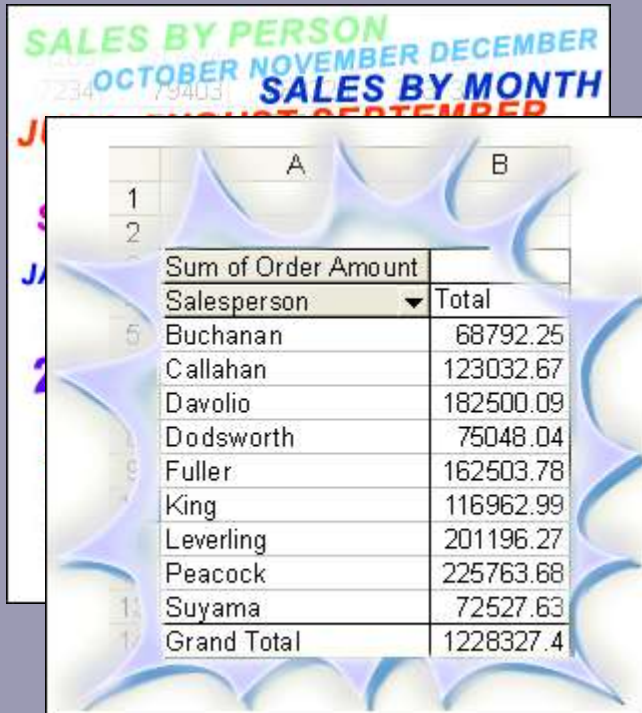
# Course contents

- Overview: More data than you can handle?
- Lesson 1: Make your data work for you
- Lesson 2: Create a PivotTable report

Each lesson includes a list of suggested tasks and a set of test questions.

What's so great about  
PivotTable reports?

# Overview: More data than you can handle?



	A	B
1		
2		
	Sum of Order Amount	
	Salesperson ▼	Total
5	Buchanan	68792.25
	Callahan	123032.67
	Davolio	182500.09
	Dodsworth	75048.04
	Fuller	162503.78
	King	116962.99
	Leverling	201196.27
	Peacock	225763.68
11	Suyama	72527.63
12	Grand Total	1228327.4

If you want to see at a glance the trends, patterns, and meaning behind your data, then Microsoft PivotTable® reports are for you.

In this short course you'll learn how PivotTable reports can summarize, analyze, and organize your worksheet data into new and meaningful views. Then you'll see how to make a PivotTable report.

What's so great about  
PivotTable reports?

# Course goals

- See why the PivotTable feature is so useful.
- Make sense out of data by creating a PivotTable report.

What's so great about  
PivotTable reports?

# Lesson 1

**Make your data work for you**

# Make your data work for you



More data than you know what to do with

Imagine an Excel worksheet of company sales figures with thousands of rows of data. Everyone has questions about what the data means. How do you get answers quickly and easily?

PivotTable reports summarize and organize data into different views that present comparisons, reveal patterns and relationships, and analyze trends. Let's find out how PivotTable reports make it so easy.

What's so great about PivotTable reports?

# Ask the questions you choose



**SALES BY REGION**

**SALES BY PERSON**

**SALES BY MONTH**

7234	79402	400328	383739
24984	290833	487395	3
0853	58384	58674	22
083	580389	3929	
5595	85933	309	
649083	87583	57	
0295	86739	287249	07
092	83574	43928	07
632	53729	57384	09
430	27384	89342	23
9011	35089	349901	57
977	73487	47897	37

With a PivotTable report, you decide what data you want analyzed, and how to organize it.

Instead of a single arbitrary form that doesn't really suit your needs, each PivotTable report gives you a different view of your data that is customized to your purposes and answers your questions on the spot.

Get data under control—determine what you want to know.

What's so great about PivotTable reports?



# Get the answers you want



Answer different questions with different PivotTable reports.

Creating a PivotTable report is about moving pieces of information around to see how they fit together.

Not satisfied with the first report? It just takes a couple of seconds to pivot rows and columns into a different arrangement, a bit like turning a kaleidoscope to see different patterns.

What's so great about PivotTable reports?

# Get the answers you want



Answer different questions with different PivotTable reports.

PivotTable reports do so much to make data manageable, it's enough to make your head spin. But you don't have to worry about arranging a report in the "wrong" way.

You can move the data around again and again, to get as many clear answers as you have questions.

What's so great about PivotTable reports?

# Test 1, question 1

**To create a PivotTable report, what's the first step? (Pick one answer.)**

1. Open the PivotTable Wizard.
2. Drag data from your worksheet into a PivotTable report view.
3. Decide what you want to know.

What's so great about  
PivotTable reports?

# Test 1, question 1: Answer

Decide what you want to know.

Before you open the PivotTable Wizard, ask yourself what you specifically need to know. Once you have your questions in mind, Excel makes it easy to get the answers.

What's so great about  
PivotTable reports?

# Test 1, question 2

**There's no wrong way to pivot data. True or false? (Pick one answer.)**

1. True.
2. False.

What's so great about  
PivotTable reports?

# Test 1, question 2: Answer

True.

Never worry about arranging a report in the “wrong” way. Creating a PivotTable report is about moving pieces of information around to see how they fit together. Move the data around again and again to get as many clear answers as you have questions.

What’s so great about  
PivotTable reports?

# Test 1, question 3

**Which of the following can you do with PivotTable views? (Pick one answer.)**

1. Analyze and summarize data.
2. Organize and compare data.
3. Both of the above.

What's so great about  
PivotTable reports?

# Test 1, question 3: Answer

Both of the above.

PivotTable views let you see patterns, trends, and relationships throughout your Excel data.

What's so great about  
PivotTable reports?

# Lesson 2

## **Create a PivotTable report**

# Create a PivotTable report



Creating a PivotTable report

In this lesson, you'll meet the wizard. (Don't bother about what's going on behind the curtain.) You'll learn how to:

1. Ask questions.
2. Use the PivotTable Wizard.
3. Create the PivotTable report.

What's so great about PivotTable reports?

# Determine what you need to know

	A	B	C
1	<b>Country</b>	<b>Salesperson</b>	<b>Order Amount</b>
2	UK	Buchanan	\$440.00
3	UK	Suyama	\$1,863.40
4	USA	Peacock	\$1,552.60
5	USA	Leverling	\$654.06
6	USA	Peacock	\$3,597.90
7	USA	Leverling	\$1,444.80
8	UK	Buchanan	\$556.62
9	UK	Dodsworth	\$2,490.50
10	USA	Leverling	\$517.80
11	USA	Peacock	\$1,119.90
12	USA	Davolio	\$1,614.88
13	USA	Peacock	\$100.80
14	USA	Peacock	\$1,504.85

Imagine that Excel is open and you're looking at sales figures: 799 rows of sales listed by country, salesperson, and order amount.

How can you make the data more understandable?

Sales figures that go on and on

What's so great about PivotTable reports?

# Determine what you need to know

	A	B	C
1	<b>Country</b>	<b>Salesperson</b>	<b>Order Amount</b>
2	UK	Buchanan	\$440.00
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12	USA	Davolio	\$1,614.88
13	USA	Peacock	\$100.80
14	USA	Peacock	\$1,504.85

To find out, start by asking yourself what you need to know:

- How much has each salesperson sold?
- What are the sales amounts by country?

Sales figures that go on and on

What's so great about PivotTable reports?

# Determine what you need to know

	A	B	C
1	<b>Country</b>	<b>Salesperson</b>	<b>Order Amount</b>
2	UK	Buchanan	\$440.00
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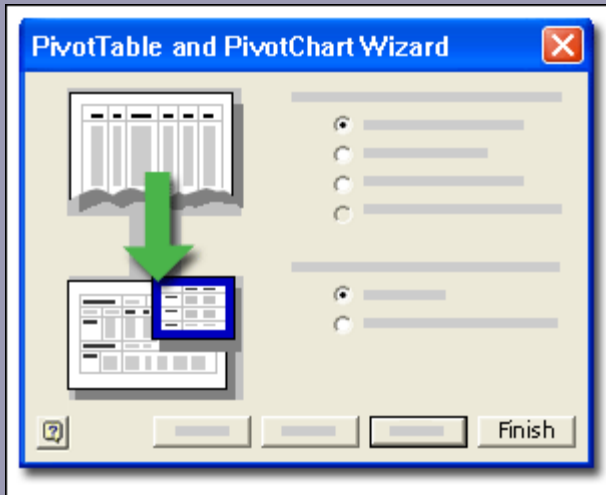
When you're ready to get the answers, do the following:

1. Click anywhere in the data.
2. Start the wizard by clicking **PivotTable and PivotChart Report** on the **Data** menu.

Sales figures that go on  
and on

What's so great about  
PivotTable reports?

# Meet the wizard



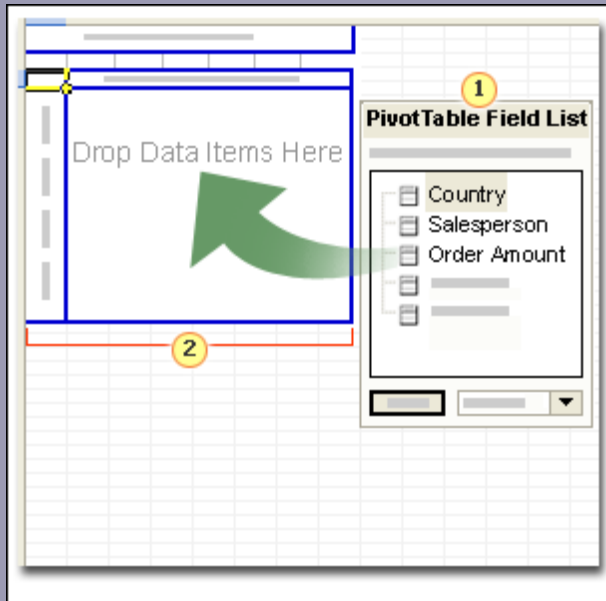
The PivotTable and PivotChart Wizard

Once the wizard is opened, click **Finish**. The wizard will use its default settings, which means it will:

- Use data in an Excel list or in a database.
- Prepare a **layout area** for creating a PivotTable report.
- Use all the data on the list.
- Place the report layout area on a new worksheet.

What's so great about PivotTable reports?

# The wizard reveals all



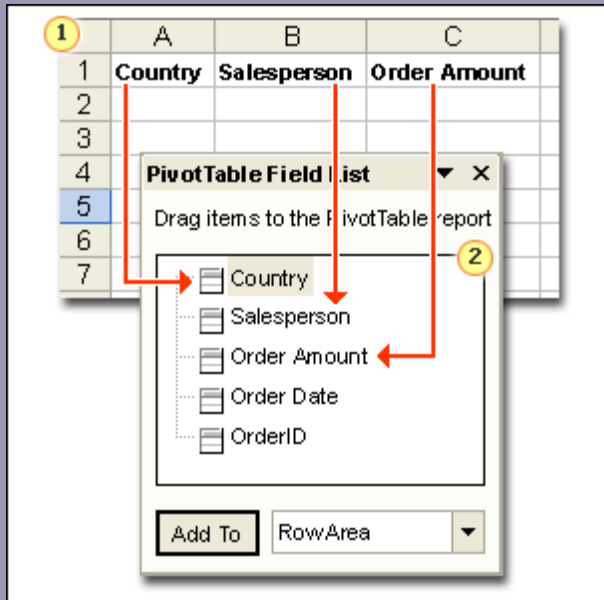
The wizard takes less than a second to prepare a new worksheet with everything you need to create a PivotTable view of your data, including:

1. The **PivotTable Field List** to drag items from.
2. The PivotTable layout area to drag items onto.

The new worksheet, ready for a PivotTable report

What's so great about PivotTable reports?

# The list to drag items from



In the **PivotTable Field List** are the names of the columns from the **source data** (the sales figures): Country, Salesperson, Order Amount, Order Date, and OrderID.

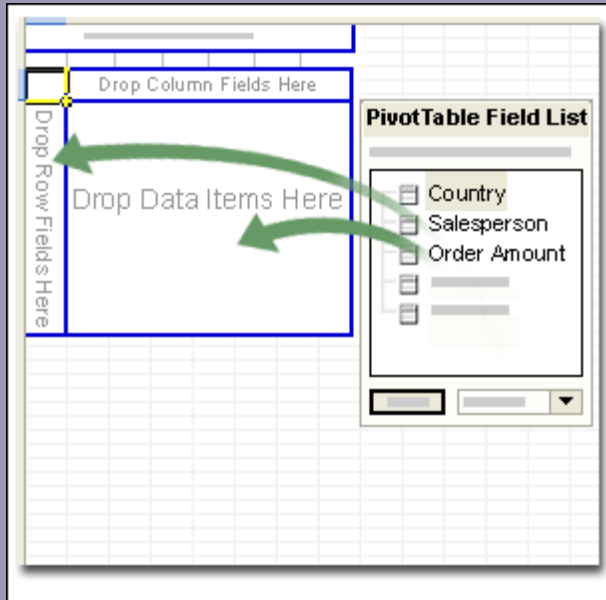
1. Each column heading in the worksheet...

2. ...has become a **field** with the same name.

Column headings become fields.

What's so great about PivotTable reports?

# The layout area to drop items onto



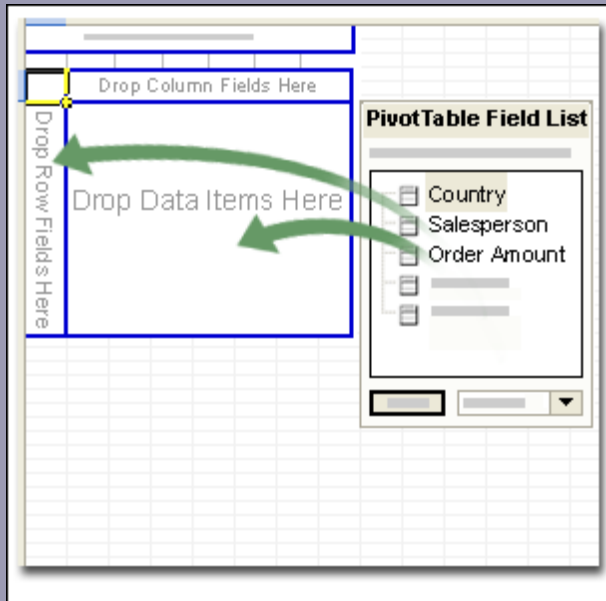
The layout area is divided into separate outlined **drop areas** onto which you drag fields from the field list. The layout area will become your PivotTable report.

Labels in the drop areas tell you where to drop data to display it in a specific orientation.

Use drop areas to control the report organization.

What's so great about PivotTable reports?

# The layout area to drop items onto



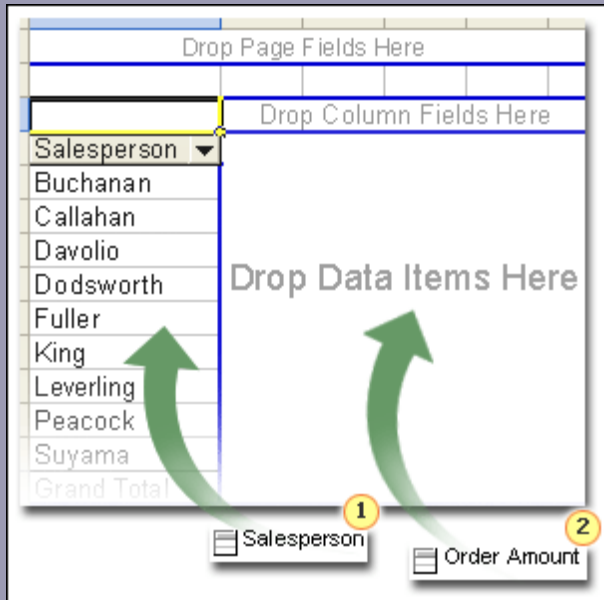
For example, if you were to drag the **Salesperson** field into the area labeled **Drop Row Fields Here**, you'd see one row for each salesperson's name.

If you dragged the **Salesperson** field into the area labeled **Drop Column Fields Here**, you'd see one column for each salesperson's name.

Use drop areas to control the report organization.

What's so great about PivotTable reports?

# Create the PivotTable report view of your data



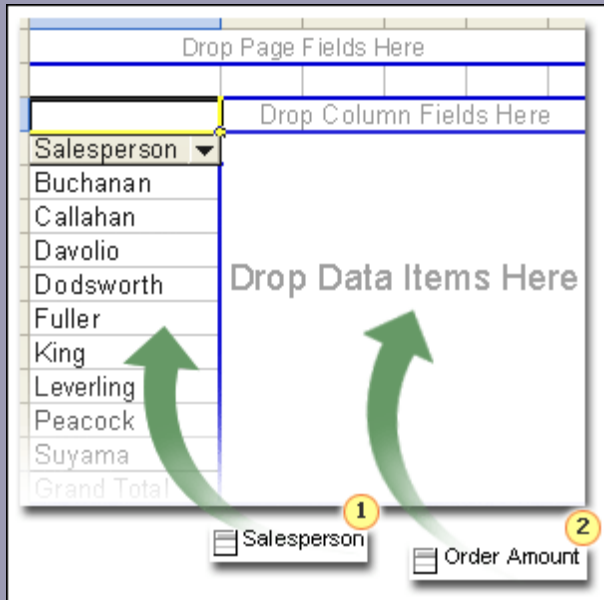
Creating the PivotTable report view

Now it's time to put the pieces together. Say that your first question is, "How much has each salesperson sold?"

To find out the answer, you use two of the fields in the field list: the **Salesperson** field to display the names of the salespeople, and the **Order Amount** field to display the amount that each person sold.

What's so great about PivotTable reports?

# Create the PivotTable report view of your data



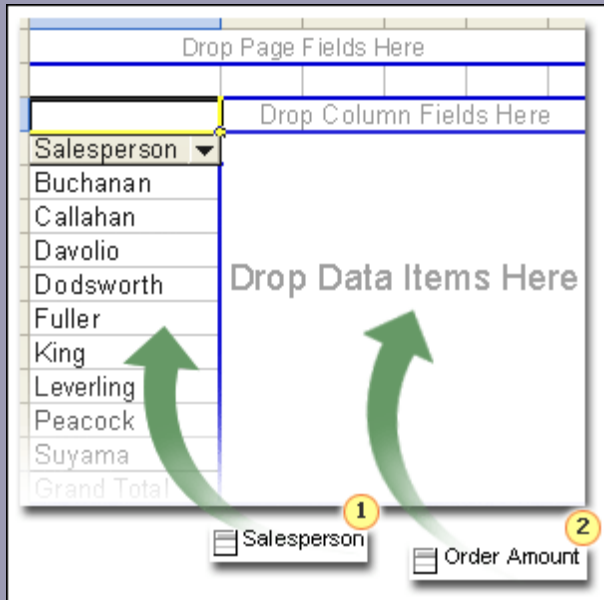
Creating the PivotTable report view

After deciding which fields to use, decide where to drop each field:

1. Drag the **Salesperson** field onto the layout area labeled **Drop Row Fields Here**. The names show up on one row apiece.
2. Then drag the **Order Amount** field to the **Drop Data Items Here** layout area to see the sales amount for each salesperson.

What's so great about PivotTable reports?

# Create the PivotTable report view of your data



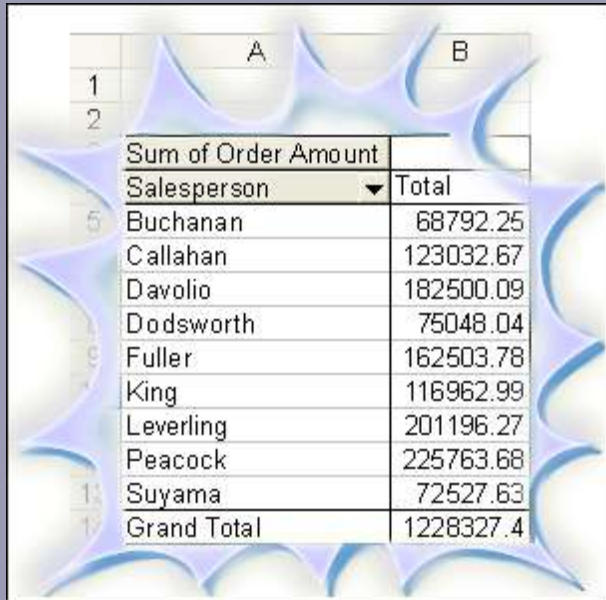
The totals then appear in your PivotTable report.

When you drop the **Order Amount** field into the data drop area, the colored outline disappears, and you see the report view.

Creating the PivotTable report view

What's so great about PivotTable reports?

# Voilà!



The image shows a screenshot of a PivotTable report in Microsoft Excel. The report is displayed in a grid with columns A and B, and rows 1 through 11. The PivotTable is titled 'Sum of Order Amount' and is filtered by 'Salesperson'. The data is summarized as follows:

Salesperson	Total
Buchanan	68792.25
Callahan	123032.67
Davolio	182500.09
Dodsworth	75048.04
Fuller	162503.78
King	116962.99
Leverling	201196.27
Peacock	225763.68
Suyama	72527.63
Grand Total	1228327.4

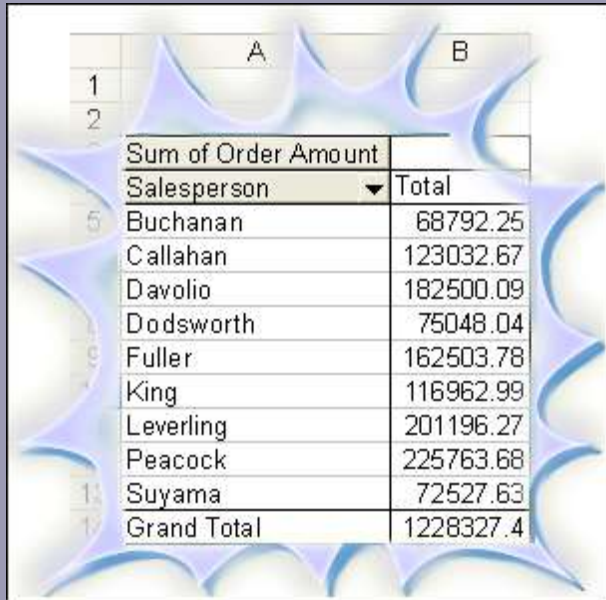
The PivotTable report

There you have it! The PivotTable report summarizes 799 rows of information so that you can see at a glance how much each person sold.

You can use the information any way you want: Show the report to others, copy it into a Word document, or publish it to a Web page.

What's so great about PivotTable reports?

# Voilà!



The image shows a screenshot of a PivotTable report in Microsoft Excel. The report is displayed in a grid with columns A and B, and rows 1 through 11. The data is summarized as follows:

Sum of Order Amount	
Salesperson	Total
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King	116962.99
Leverling	201196.27
Peacock	225763.68
Suyama	72527.63
Grand Total	1228327.4

The PivotTable report

To get the answers to other questions as quickly and easily, you could drag other field items into the layout.

Or to display different relationships, you could sort or pivot your data with different fields in the columns or rows simply by dragging field items from one drop area to the other.

What's so great about  
PivotTable reports?

# Suggestions for practice

1. Create the report view.
2. Lay out the report.
3. Pivot the report.
4. Create page views.
5. Drag fields off the report.

[Online practice](#) (requires Excel 2003)

What's so great about  
PivotTable reports?

# Test 2, question 1

**You create a PivotTable view of your data by dragging fields from the PivotTable Field List. (Pick one answer.)**

1. True.
2. False.

What's so great about  
PivotTable reports?

# Test 2, question 1: Answer

True.

In the PivotTable Field List are the names of the columns in the source data. Dragging fields from the field list and dropping them onto the layout area is how you create a PivotTable view of your data.

What's so great about  
PivotTable reports?

# Test 2, question 2

**What are PivotTable fields? (Pick one answer.)**

1. Column information from the source data.
2. The PivotTable report layout area.
3. The area where you pivot data.

What's so great about  
PivotTable reports?

# Test 2, question 2: Answer

Column information from the source data.

Column headings from the source data become fields of information that you drag into the layout area.

What's so great about  
PivotTable reports?

# Test 2, question 3

**You have names in your data, and you want to see each name in a row. Into which drop area would you drag that field? (Pick one answer.)**

1. Drop Column Fields Here
2. Drop Row Fields Here
3. Drop Data Fields Here

What's so great about  
PivotTable reports?

# Test 2, question 3: Answer

Drop Row Fields Here

Then you'll see one row for each name.

What's so great about  
PivotTable reports?