



Excel 2013:

PivotTables and PivotCharts

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PivotTables and PivotCharts

When creating a PivotTable or PivotChart in Excel 2013 there are a few things to keep in mind:

- If you try to save a PivotTable as an Excel 97-2003 document, you are likely to lose some formatting. Excel has improved many features and most of these improvements are not compatible with older versions of Excel.
- Make sure you have column titles on your spreadsheet. The names of the fields for the report will be taken from these column titles.
- Make sure you have the same type of items in the same column. For example, make sure data columns only include numerical data and text columns only include text.
- Make sure you delete all empty rows/columns in your spreadsheet.

There is a sample file called **Excel Advanced Sample** in the **Training Samples** folder on the public (G:) drive that can be used for this tutorial.

Note: When you create a PivotChart, a PivotTable is also created to complement the chart. Therefore, if you want both a PivotChart and a PivotTable you do not need to create them separately.

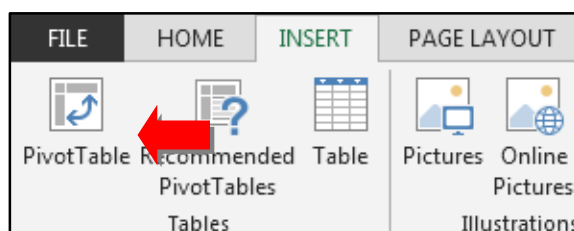
PivotTables

To create a PivotTable

1. Highlight the data that you want to include in the PivotTable.
2. Select the **Insert** tab.



3. Select **PivotTable**.



- The **Table/Range** is automatically populated based on the data you highlighted.

Note: If you want a different range, enter different values in the Table/Range field.

Choose the data that you want to analyze

Select a table or range

Table/Range: Sheet1!\$A\$1:\$E\$51

Use an external data source

- Select whether to place the PivotTable in a **New Worksheet** or the **Existing Worksheet**.

Choose where you want the PivotTable report to be placed

New Worksheet

Existing Worksheet

Location: Sheet1!\$G\$1

OK Cancel

- Select **OK**. Your PivotTable will be created.

To add fields to the PivotTable

- Select the PivotTable in the spreadsheet.
- Select the fields you want to add from the list on the right side of the spreadsheet.

PivotTable Field List

Choose fields to add to report:

Country

Salesperson

Order Amount

Order Date

OrderID

- The first item selected will be placed in **Row Labels** and the second item will be placed in **Values**.

Row Labels

Salesperson

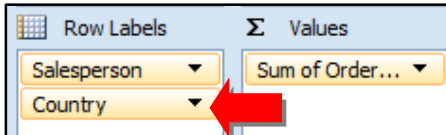
Values

Sum of Order...

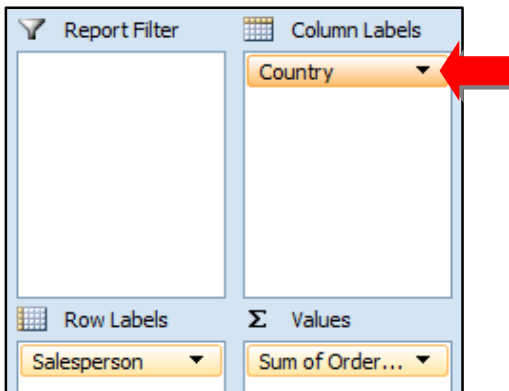
- The PivotTable is updated to reflect the addition of these fields.

To change the field grouping

1. Select the PivotTable in the spreadsheet.
2. Select the field you want to move to another grouping.



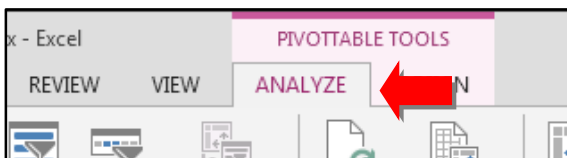
3. Drag and drop the field into a different group.



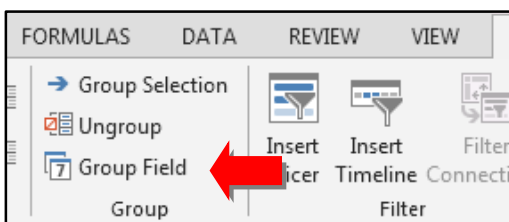
4. The PivotTable will automatically update to reflect the different grouping.

To change the sub-field grouping

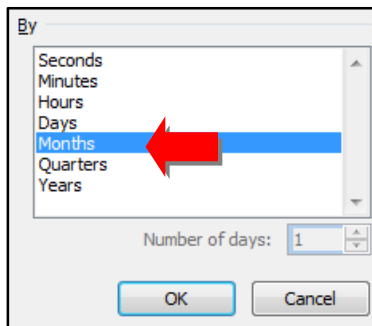
1. Select the PivotTable in the spreadsheet.
2. Select any of the sub-fields.
3. Select the **PivotTable Tools Analyze** tab.



4. Select **Group Field**.



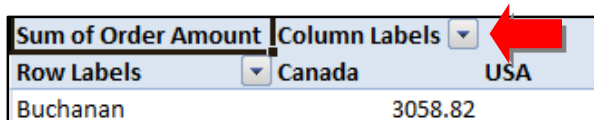
5. Select how you want to group the sub-field (i.e. Month, Hour)



6. Select **OK**.
7. The PivotTable will automatically update to reflect the changes.

To change the visible rows

1. Select the PivotTable in the spreadsheet.
2. Select the drop-down arrow next to the column title.



| Sum of Order Amount | Column Labels | |
|---------------------|---------------|-----|
| | Canada | USA |
| Buchanan | 3058.82 | |

3. Check or uncheck items and select **OK**.

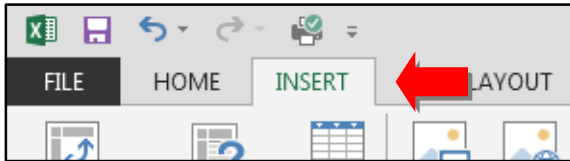


4. The PivotTable will automatically update to reflect the changes.

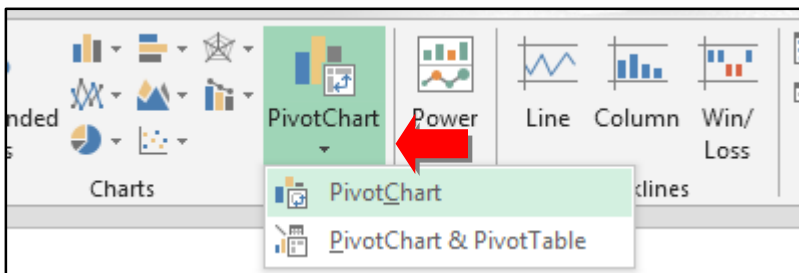
PivotCharts

To create a PivotChart

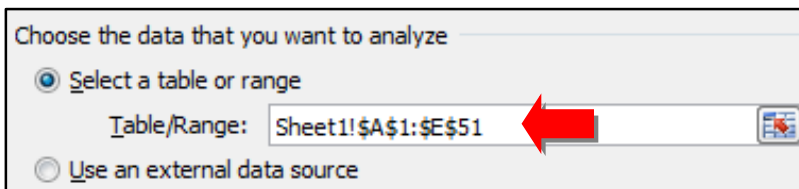
1. Highlight the data that you want to include in the PivotChart.
2. Select the **Insert** tab.



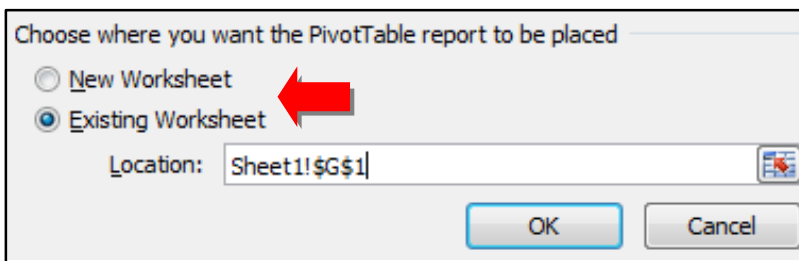
3. Select **PivotChart** from the Charts area.



4. The **Table/Range** is automatically populated based on the data you highlighted.



5. Select whether to place the PivotTable in a **New Worksheet** or the **Existing Worksheet**.



6. Select **OK**. Your PivotChart and PivotTable will be created.

Note: Use the steps in the PivotTable section to make changes to the PivotChart. Excel will automatically update the PivotChart to reflect any changes to the PivotTable.