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When creating a PivotTable or PivotChart in Excel 2016 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 roles/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.
4. 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.

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

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

**To add fields to the PivotTable**

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

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

4. 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)

![Grouping sub-field](image)

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.

![Column selection](image)

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

![Filter options](image)

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.