Pivot Tables in Excel 2007

2D Pivot Tables:

1. To create a Pivot Table in excel, select the Pivot Table button under the Insert tab. All filtering and conditional formatting must be turned off.

2. When you click on the Pivot Table button a Create PivotTable window appears with the default Table/Range inserted. If you want a different range of data in your pivot table, select it now. Then click OK.

3. You will then see an outline of the pivot table.
4. Decide what you want as your row and column headers. In our example, *RENT VS. OWN* is the column heading. Click on *RENT VS. OWN* in the PivotTable Field List box and drag it to the area on the pivot table that says *Drop Column Fields Here*. Next, create the row heading which is *REGION* in our example. Drag and drop *REGION* in *Drop Row Fields Here*. Lastly we need to insert the Data. For our example we want to count the customers by region and rent vs. own, therefore drag and drop *CUST ID* in *Drop Data Items Here*.

5. When you drop information into the data section of the pivot table, it automatically sums all the data. In this example we don’t want to sum the Customer IDs, we want to count them. To change the data from summation to count you must:
   a. Right Click in the Data section of the Pivot Table
   b. Go to *Summarize Data By*
   c. Select *Count*. This will change the data from Summation to Counting the Customer IDs

You have now created a 2D pivot table counting the number of customers who Rent or Own in each region.
6. If this simple pivot table does not give you enough information, you do not have to create another one. You can just add more data to this pivot table to make it more informative. For example, if you also want to know the total of the purchases each customer makes when they rent and own and in which regions you can do so. Click and drag TOTAL PURCHASES into the data section of the table where the custID is already.

Drag TOTAL PURCHASES here.
3D Pivot Tables:

A 3D pivot table looks similar to a 2D pivot table. The difference is it has depth and can offer you more information.

1. Start with the 2D pivot table previously created with only one form of data in the data section (CustID).

2. To add depth to the 2D pivot table we add another way to narrow down the data. In this example we want to count the number of customers by the categories of REGION, RENT VS. OWN, and NUM HOUSEHOLD. To make it a 3D pivot table, drag and drop NUM HOUSEHOLD into the Drop Page Fields Here section.

3. The default of the 3D pivot table is to show All the data. To change the depth of the pivot table click on the drop down arrow and change the criteria. Click on the NUM HOUSEHOLD drop down arrow and select 3. You have just created a 3D Pivot Table!