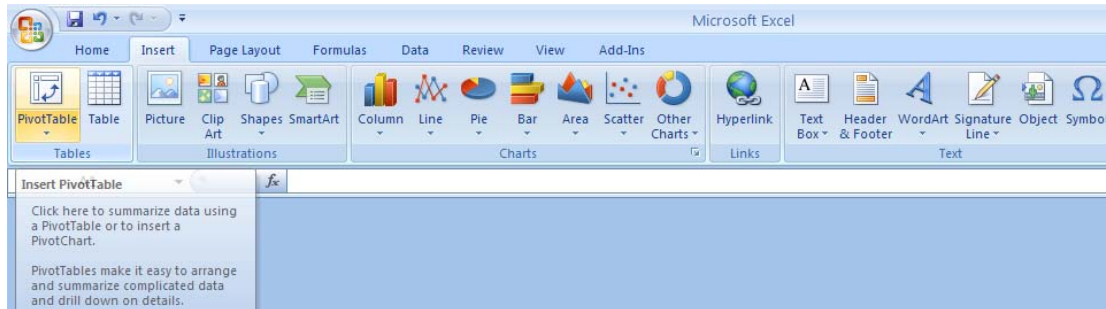


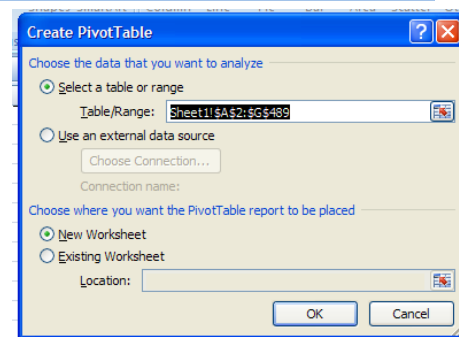
Pivot Tables in Excel 2007

2D Pivot Tables:

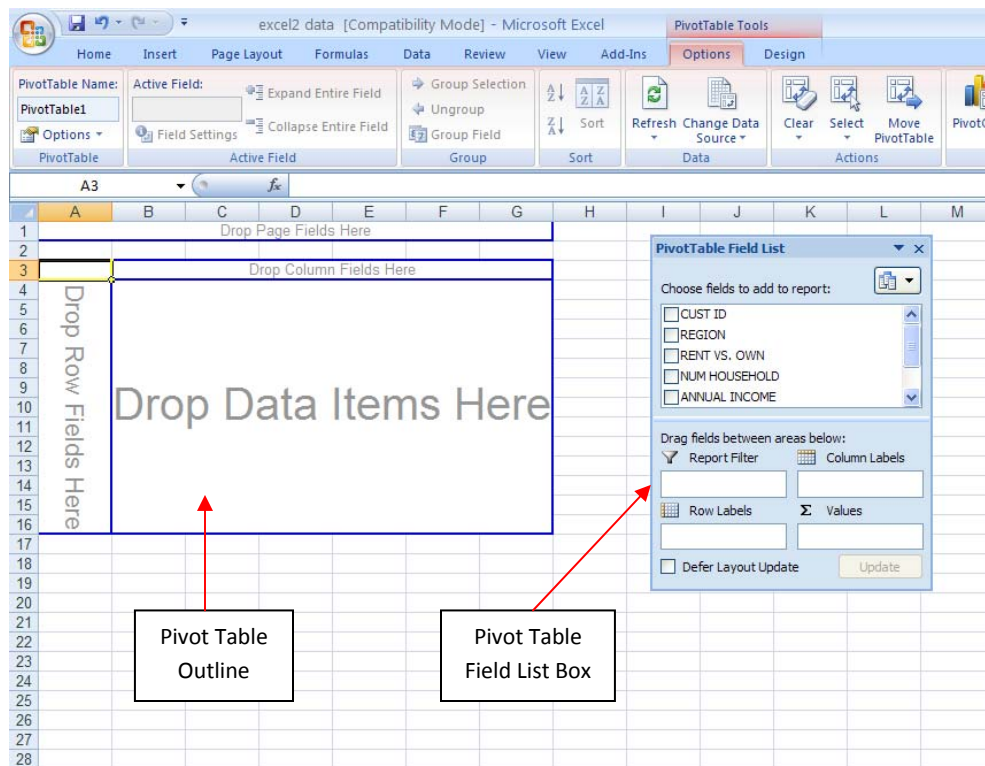
1. To create a Pivot Table in excel, select the *Pivot Table* button under the *Insert* tab. All filtering and conditional formatting must be turned off.



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*.

Sum of CUST ID

REGION	Own	Rent	Grand Total
East	19720	16852	36572
North	15668	15026	30694
South	12470	10386	22856
West	17967	10739	28706
Grand Total	65825	53003	118828

PivotTable Field List

Choose fields to add to report:

- ☒ CUST ID
- ☒ REGION
- ☒ RENT VS. OWN
- ☐ NUM HOUSEHOLD
- ☐ ANNUAL INCOME

Drag fields between areas below:

Report Filter: [Empty]

Column Labels: RENT VS. OWN

Row Labels: REGION

Values: Sum of CUST ID

☐ Defer Layout Update [Update]

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.

Count of CUST ID	RENT VS. OWN	
REGION	Own	Rent
East	82	63
North	63	51
South	51	66
West	66	262
Grand Total	262	

Context Menu:

- Copy
- Format Cells...
- Number Format...
- Refresh
- Sort
- Remove "Count of CUST ID"
- Summarize Data By
 - Sum
 - ☒ Count
 - Average
 - Max
 - Min
 - Product
 - More options...
- Show Details
- Value Field Settings...
- PivotTable Options...
- Hide Field List

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.

	A	B	C	D	E	F	G	H	I	J
1										
2										
3										
4	REGION	Data	RENT VS. OWN							
5	East	Count of CUST ID	Own	Rent	Grand Total					
6		Sum of TOTAL PURCHASES	5793	4440	10233					
7	North	Count of CUST ID	63	62	125					
8		Sum of TOTAL PURCHASES	4260	4502	8762					
9	South	Count of CUST ID	51	47	98					
10		Sum of TOTAL PURCHASES	3326	3086	6412					
11	West	Count of CUST ID	66	50	116					
12		Sum of TOTAL PURCHASES	4335	3654	7989					
13	Total Count of CUST ID		262	225	487					
14	Total Sum of TOTAL PURCHASES		17714	15682	33396					
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										

Drag TOTAL PURCHASES here.

PivotTable Field List

Choose fields to add to report:

- ☒ CUST ID
- ☒ REGION
- ☒ RENT VS. OWN
- ☐ NUM HOUSEHOLD
- ☐ ANNUAL INCOME
- ☒ TOTAL PURCHASES
- ☐ NUM PURCHASES

Drag fields between areas below:

Report Filter:

Column Labels: RENT VS. OWN

Row Labels: REGION

Values: Count of CUS..., Sum of TOTA...

☐ Defer Layout Update

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.

The screenshot shows an Excel spreadsheet with a pivot table. The pivot table has 'REGION' as the row label, 'RENT VS. OWN' as the column label, and 'Count of CUST ID' as the values. The data is summarized by region and rent/own status. To the right, the 'PivotTable Field List' task pane is open, showing fields to add to the report: CUST ID, REGION, RENT VS. OWN, NUM HOUSEHOLD, and ANNUAL INCOME. The 'NUM HOUSEHOLD' field is being dragged to the 'Drop Page Fields Here' section.

Count of CUST ID	RENT VS. OWN		
REGION	Own	Rent	Grand Total
East	82	66	148
North	63	62	125
South	51	47	98
West	66	50	116
Grand Total	262	225	487

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!

The screenshot shows the same Excel spreadsheet, but now the 'NUM HOUSEHOLD' dropdown in the pivot table is set to '3'. A callout box points to the dropdown arrow with the text 'Click here to see depth options'. Below this, a second screenshot shows the 'NUM HOUSEHOLD' dropdown menu with '3' selected. The pivot table now shows data for each region, rent/own status, and the number of households (3).

Count of CUST ID	RENT VS. OWN		
REGION	Own	Rent	Grand Total
East	16	14	30
North	11	19	30
South	8	8	16
West	12	9	21
Grand Total	47	50	97