

If only there was better way of doing....Excel Pivot Tables

How often have you been asked to analyse a massive spreadsheet full of data?

Your boss will e-mail you data with a brief (read non-descript!) message outlining what they want.....you open the workbook to find 30,000+ lines of data across 30+ columns. Even though you already suspect what the answer is going to be, you ask “and when is this needed by?” Your suspicions are immediately confirmed with the answer “Yesterday!”

Mild dread now turns to blind panic. You start planning how to extract the information to try and get the sort of output you have been asked for. You probably do the following;

Step 1: apply the Autofilter to all your columns

Step 2: filter out lines and copy and paste them to another sheet

Step 3: start counting lines manually and making notes on Post It notes

Step 4: put it all together in some sort of meaningful summary document hoping and praying you have not missed anything out.

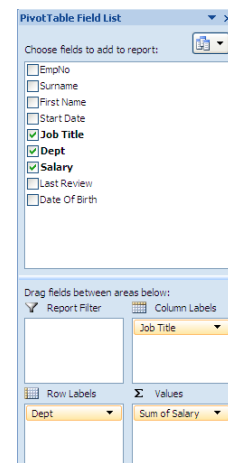
Then, after what feels like hours of copying, pasting and trying to decipher all your Post It notes, the request comes to make ‘a few’ changes. None of the previous calculations you made on your Post Its apply, so only one thing to do...start again. Joy!

But no need! Excel has a very powerful built in tool to analyse and summarise lists of data – the Pivot Table!

What took you several hours to do manually, you will be able complete within a minute – literally!

EmpNo	Surname	First Name	Start Date	Job Title	Dept	Salary	Last Review	Date Of Birth
00123	Harris	Peter	05/01/2000	Administrator	Finance	£17,000	20/12/2001	15/07/1965
00321	Collins	Rachel	08/03/2001	Customer Services Co-ordinator	Training	£19,500	08/12/2001	31/12/1981
00453	Brown	Jill	11/01/2002	Web Site Designer	IT	£25,000	20/02/2002	04/05/1967
00325	Jones	Colin	15/09/2001	Finance Manager	Finance	£29,000	11/12/2002	03/01/1976
00621	Mc Dougall	Sarah	30/10/2002	Secretary	Training	£18,000	06/01/2003	09/08/1960
00458	Gardiner	Caroline	10/04/2002	IT Support	IT	£19,350	21/12/2003	27/04/1976
00923	Haines	Gregory	11/06/2002	Secretary	Finance	£18,000	12/12/2002	30/06/1978
00512	Charles	Tania	29/07/2002	Trainer	Training	£21,000	17/01/2003	12/03/1956
00342	Dennis	Anna	04/09/2001	Trainer	Training	£21,000	04/01/2003	04/09/1980

In this example we have a list of employees. The table is correctly formatted to use with Pivot tables i.e. no row headings and each column has a heading (2 must have for Pivots to work). We might want to see total salaries for each department and perhaps split that by job title. So...instead of filtering information and doing all the manual steps described above, click in the data table (click #1).



THALES

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Go to the **INSERT** tab (click #2) and select **PIVOT TABLE** (click #3). As long as you are clicked in the table it will work out how many rows and columns there are.

Click and drag the fields you are interested in, into the relevant area below your field list as seen above - so that is 1 click per heading selected (clicks #4,5 and 6).

As you click and drag the column headings into the different areas your data will appear to the left as a summary pivot table. Job done!

Sum of Salary	Column Labels		
Row Labels	Administrator	Customer Services Co-ordinator	Finance Manager
Finance	42000	42500	29000
IT	21000	30000	
Training	73000	19500	
Grand Total	136000	92000	29000

The beauty and simplicity of the Pivot Table comes into its own when you are asked to make that 'small change'. Let's say your boss decides they prefer to see the list of job titles next to each department rather than across the top. Easy!

Click and drag **Job Title** from the column labels box to the row labels box under **Dept** (click #7).

The table now rearranges itself to display the 'small change'.

Row Labels	Sum of Salary
Finance	264750
Administrator	42000
Customer Services Co-ordinator	42500
Finance Manager	29000
IT Support	29000
Secretary	63500
Trainer	42250
Web Site Designer	16500
IT	254650
Administrator	21000
Customer Services Co-ordinator	30000
IT Support	48350
Secretary	40500
Trainer	70300
Web Site Designer	44500

Now think of the clicking, filtering and everything else you needed to do before you discovered Pivot Tables and compare that to the 7 clicks required to create a summary table **and** change it. Your boss is happy as they have what they wanted, and you're happy because it has only taken you 1 minute to do the whole job. Time for a cup of tea to celebrate!