

Microsoft Excel 365: Pivot Tables

Welcome

Microsoft Excel 365 Pivot Tables

Live Online

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Welcome

- Please unmute your mic and turn your camera on and say hello.
- Please ask questions.
- Tell me once you have finished a practical activity, then we can all move on.

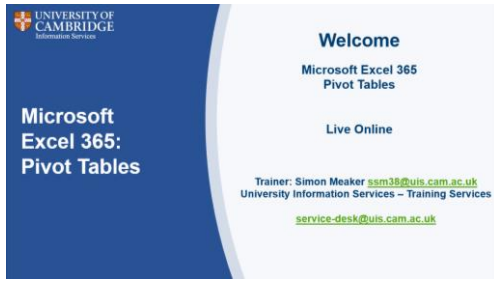
Course Information

Objectives

- How to use Pivot Tables with Microsoft Excel 365
- Duration
- Delivery Style – demonstrations and practical's

General Information

- Please fill in the Feedback form at the end of the course <http://feedback.training.cam.ac.uk/uis>
- Please ask questions
(This is your course and I want you to get as much as you can out of it)
- If you need assistance with the practical's let me know and we can share desktops



Slides



Files



Learning Paths



General Information

Course Material

Course Information

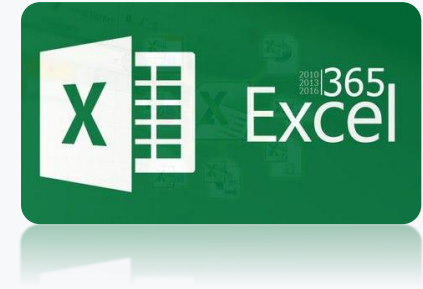
Related Courses

www.linkedin.com/learning

www.training.cam.ac.uk

Which version Are you using?

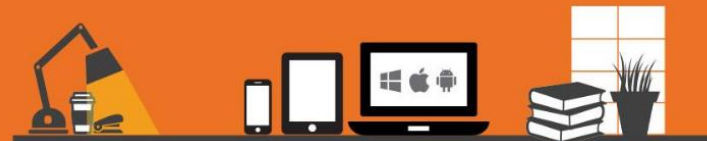
All the exercises will work using the following



Thinking of upgrading?

Staff and students can download Office 365 for free
via this [link](#)

Get Office 365 ProPlus
on your personal devices...



All students, and staff from qualifying institutions: download Office 365 ProPlus free on your personal devices to use while you are at Cambridge.
(Your login will expire 30 days after you leave the University.)

Microsoft Excel 365: Pivot Tables

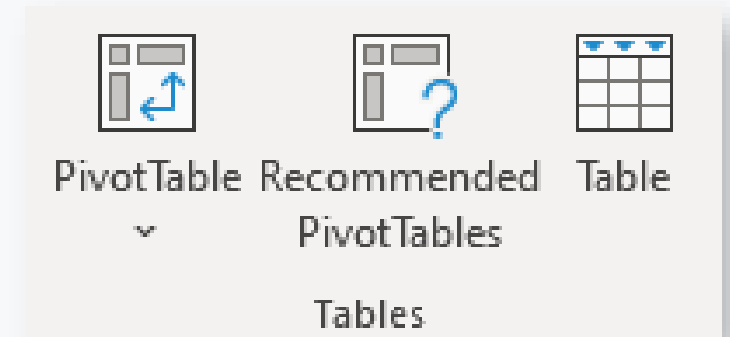
Course Topics

1. Prepping your data
2. Make a Pivot Table from a Data Source
3. Benefits of converting the Data Source to a Table
4. Create a Pivot Table in a new worksheet
5. Slicer's
6. Timeline Slicer
7. Formatting Values
8. Design Options
9. Conditional Formatting
10. Pivot Charts

Microsoft Outlook 365: Pivot Tables

Demo 1: Prep Your Data

File '*PrepYourData*'



Make sure your data does not have:

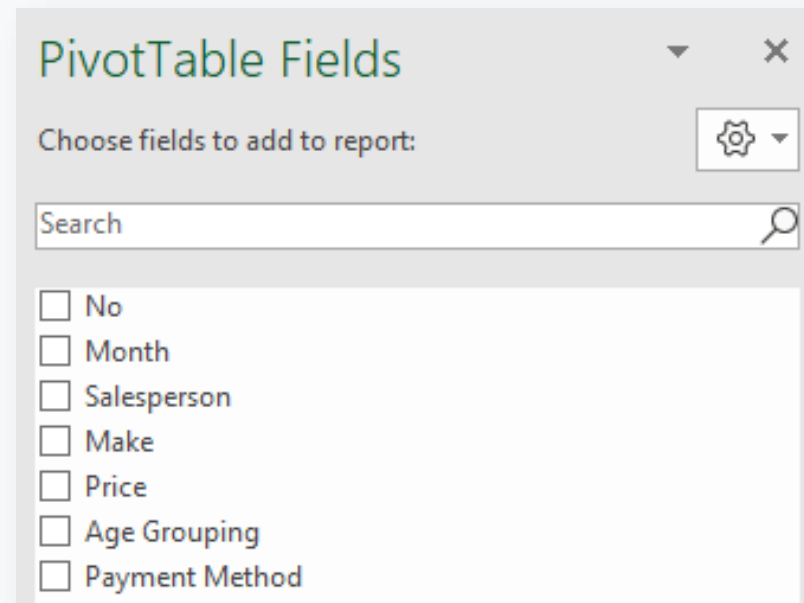
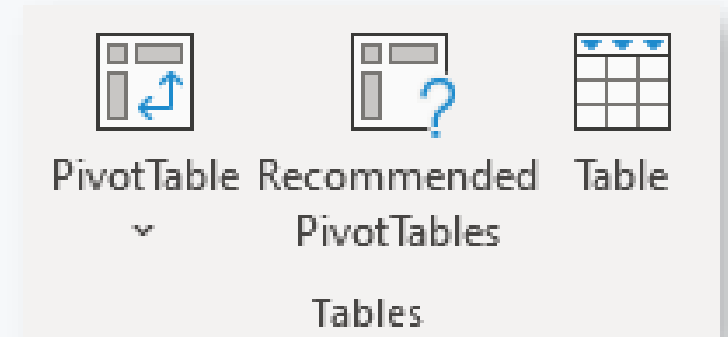
- Blank Rows
- Blank Columns
- Empty Cells

Microsoft Outlook 365: Pivot Tables

Demo 2:

Create a Pivot Table from a Data Source

File 'PivotTables_1' – 'Data Sheet' worksheet



Microsoft Outlook 365: Pivot Tables

Practice:

Create a Pivot Table from a Data Source

File *'PivotTables_1'* use *'Data Sheet'* worksheet

Using Rows and Values

Click into Data

Insert Pivot Table into Existing Worksheet Cell I5

Move:

'Salesperson' into Rows

'Price' into Values

Microsoft Outlook 365: Pivot Tables

Practice: Changing the Data Source

File *'PivotTables_1'* use *'Data Sheet'* worksheet

Using Rows and Values

Add an extra line of data into Row 107

Use the Change Data Source option to add the extra row of data.

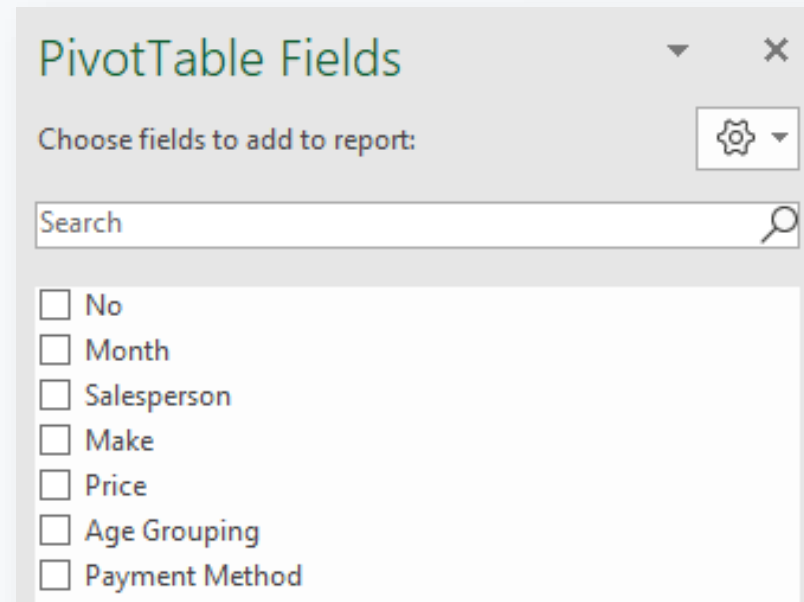
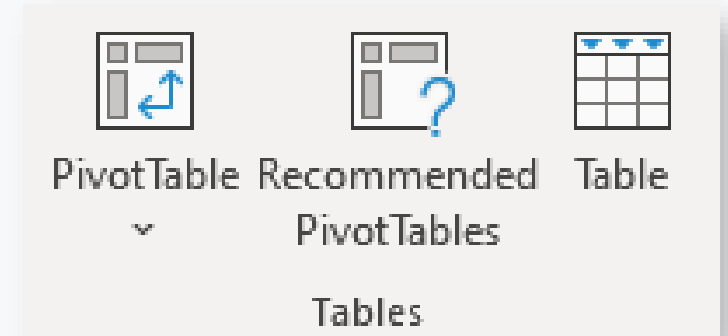
Has the total in the Pivot Table updated?

Microsoft Outlook 365: Pivot Tables

Demo 3:

Create a Pivot Table from a Table of Data

File 'PivotTables_1' – 'Data Sheet Table' worksheet



Microsoft Outlook 365: Pivot Tables

Practice:

Create a Pivot Table from a Table of Data

File '*PivotTables_1*' use '*Data Sheet Table*' worksheet

Using Rows and Values

Change the range of Data to a Table

Select the Data using Ctrl + Shift and Arrow Keys

Insert Table / Ctrl + T

Insert Pivot Table into Existing Worksheet Cell I5

Move:

'Salesperson' into Rows

'Price' into Values

Microsoft Outlook 365: Pivot Tables

Practice: Refresh the Data Source

File *'PivotTables_1'* use *'Data Sheet Table'* worksheet

Using Rows and Values

Add an extra line of data into Row 107

Use the Refresh Button to add the extra row of data.

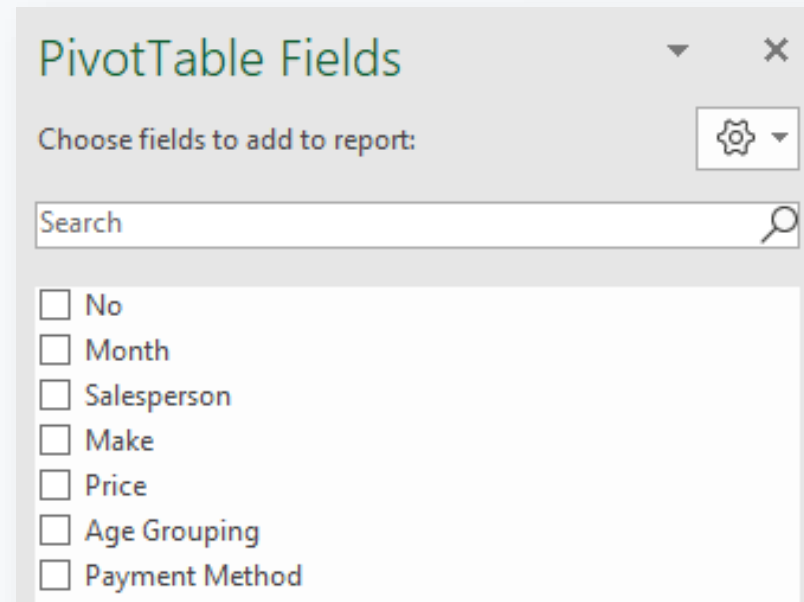
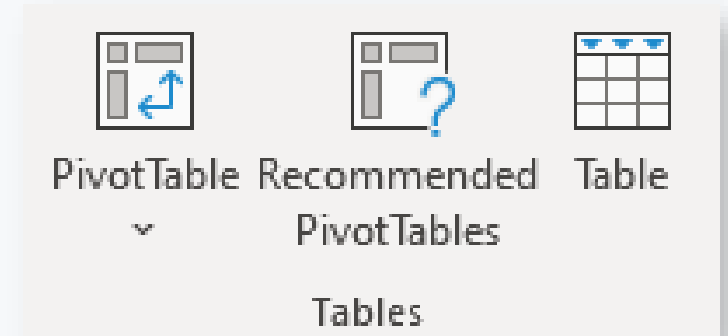
Has the total in the Pivot Table updated?

Microsoft Outlook 365: Pivot Tables

Demo 4:

Create a Pivot Table in a New Worksheet

File 'PivotTables_2' – 'Data Sheet' Worksheet



Microsoft Outlook 365: Pivot Tables

Practice Pivot Tables

File '*PivotTables_2*' use '*Data Sheet*' worksheet

Using Rows and Columns

Click into Data

Insert Pivot Table onto a New Worksheet

Rename Worksheet to 'Pivot Table'

Move:

'Month' into Columns

'Salesperson' into Rows

'Price' into Values

Reverse 'Month' and 'Salesperson' and then change back to how it was

Microsoft Outlook 365: Pivot Tables

Practice Pivot Tables

File *'PivotTables_2'* use *'Data Sheet'* worksheet

Add additional Fields

Drag 'Age Grouping' into Rows area
Move 'Age Grouping' out and replace with 'Make'

Filters

Drag 'Make' into the Filter area
Filter using 'Toyota' and 'VW'
Then Select All

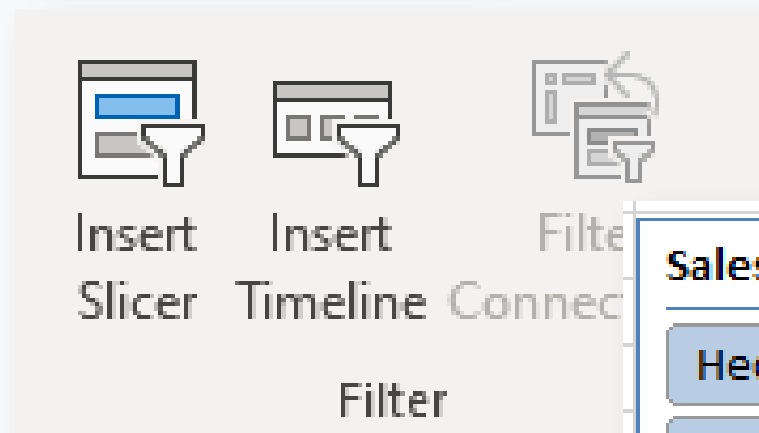
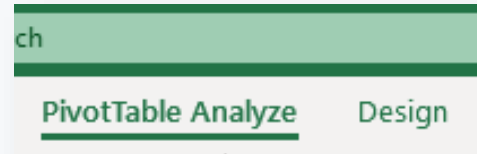
Drag 'Make' out of area

Try some others

Microsoft Outlook 365: Pivot Tables Slicer's

Demo 5: Slicers

File 'PivotTables_2'



Salesperson		☑☑☑	☒
Hector Smith			
Justin Callaghan			
Mary O'Dwyer			

Microsoft Outlook 365: Pivot Tables Slicer's

Practice Slicers

File '*PivotTables_2*' use '*Data Sheet*' worksheet

Slicers

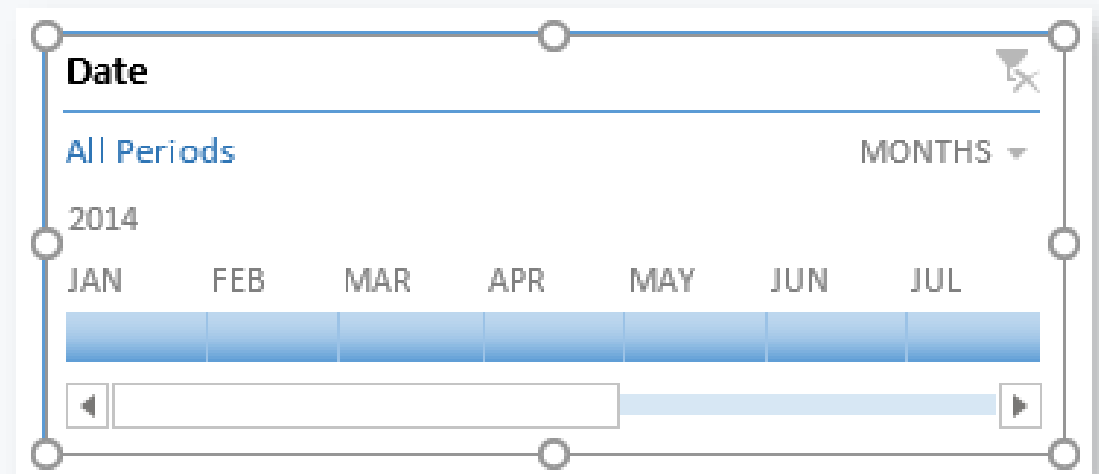
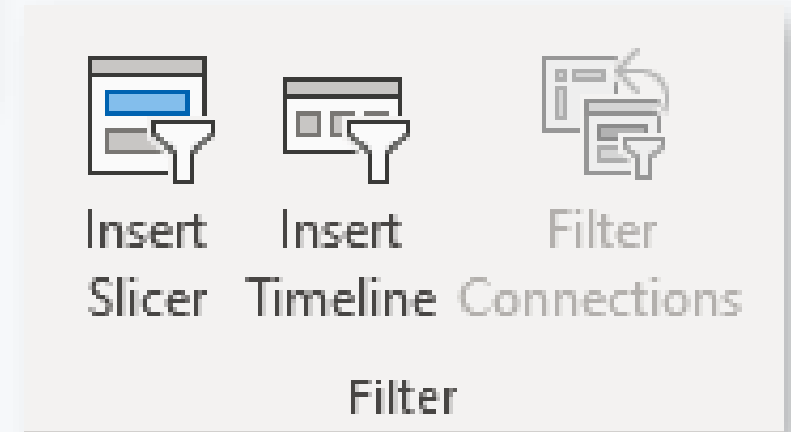
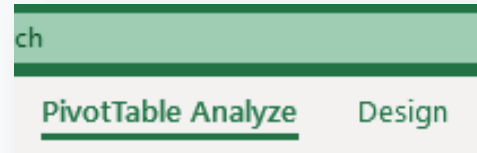
Click on PivotTable Analyze Tab
Insert Slicer
Choose 'Salesperson'
See how it works and delete it

Try some others...

Microsoft Outlook 365: Pivot Tables Timeline Slicer

Demo 6: Timeline Slicer

File 'PivotTables_9'



Microsoft Outlook 365: Pivot Tables Timeline Slicer

Practice Pivot Tables

File '*PivotTables_9*' use '*PivotTable*' worksheet

Timeline Slicers

Click on PivotTable Analyze Tab

Insert Timeline Slicer

Select 'Date'

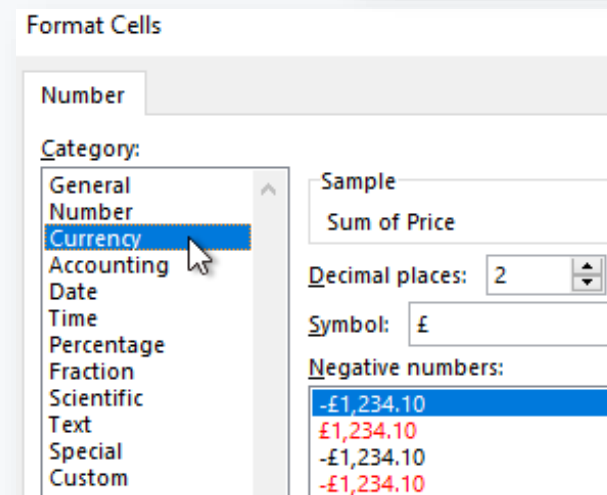
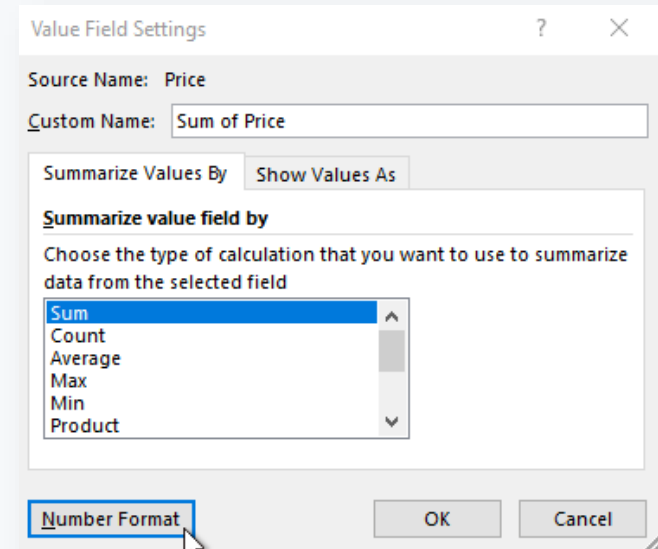
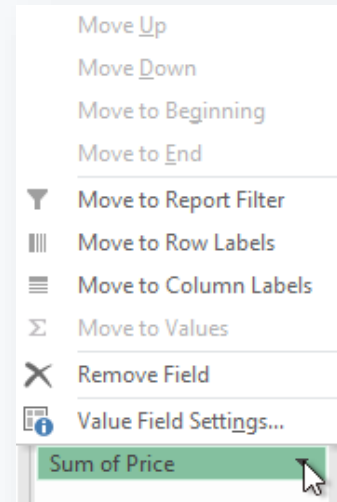
Drag to resize the slicer

Select the month Data you are interested in

Microsoft Outlook 365: Pivot Tables Formatting Values

Demo 7: Formatting Values

File 'PivotTable Features_2' – 'PivotTable' Worksheet



Microsoft Outlook 365: Pivot Tables Formatting Values

Practice Pivot Tables

File *'PivotTable Features_2'* use *'Sheet 1'* worksheet

Counting

Click on 'Sum of Price' in 'Values' field
Click 'Value Field Settings'
Change to 'Count'

Microsoft Outlook 365: Pivot Tables Formatting Values

Practice Formatting Values

File *'PivotTable Features_2'* use *'Sheet 1'* worksheet

Formatting Currency Values

Click on 'Sum of Price' in 'Values' field

Click 'Value Field Settings'

Change to 'Sum'

Click on 'Number Format button'

Choose 'Currency'

Microsoft Outlook 365: Pivot Tables Formatting Values

Practice Formatting Values

File '*PivotTable Features_2*' use '*Sheet 1*' worksheet

Rearrange the fields

Change the field settings as follows:

Columns

Month
Salesperson

Rows

Make
Model

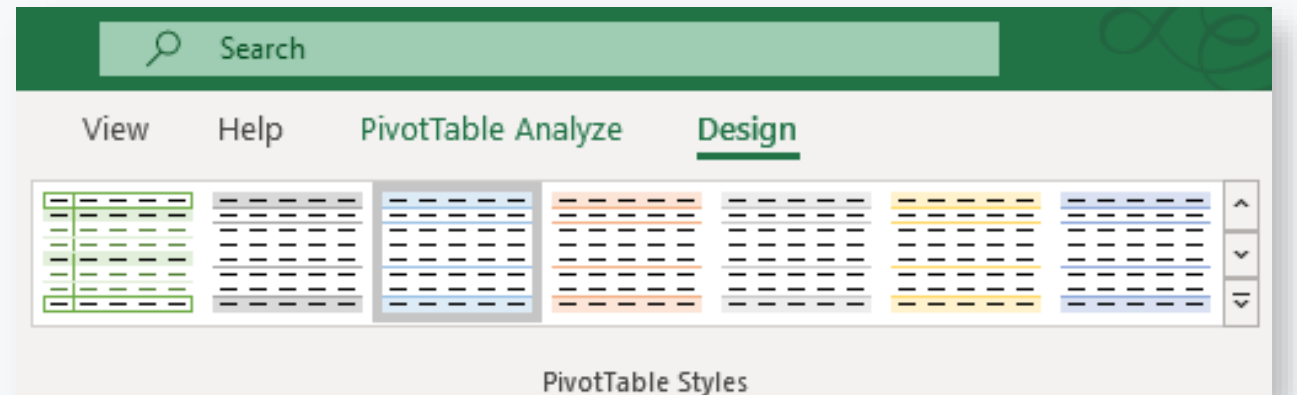
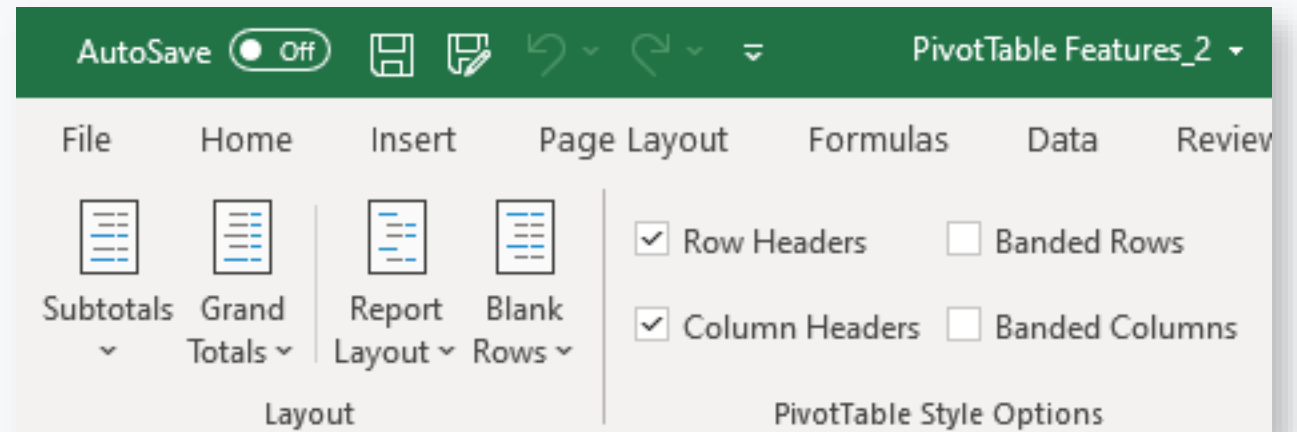
Values

Sum of Price

Microsoft Outlook 365: Pivot Tables Design Options

Demo 8: Design Options

File 'PivotTable Features_2' – 'PivotTable' Worksheet



Microsoft Outlook 365: Pivot Tables Design Options

Practice Design Options

File *'PivotTable Features_2'* use *'Sheet 1'* worksheet

Remove 'Month' from 'Columns'

Select the Pivot Table 'Design' tab

Try out the various options for:

Subtotals

Grand Totals

Report Layout

Blank Rows

Found under the drop-down menu options for each

Microsoft Outlook 365: Pivot Tables Design Options

Practice Design Options

File '*PivotTable Features_2*' use '*Sheet 1*' worksheet

Turn on Banded Rows

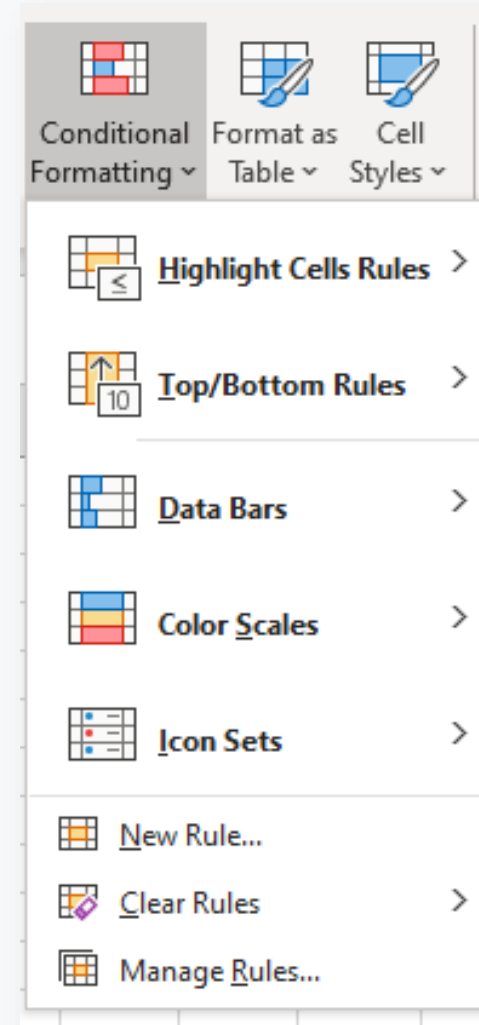
Choose a different style

Try out the other 'PivotTable Style Options'

Microsoft Outlook 365: Pivot Tables Conditional Formatting

Demo 9: Conditional Formatting

File 'PivotTable Features_2' – 'PivotTable' Worksheet



Microsoft Outlook 365: Pivot Tables Conditional Formatting

Practice Conditional Formatting

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Turn off 'Banded Rows'

Rearrange Pivot Table as follows:

Move Salesperson and Model into Filters Area
Make into Rows
Price into Values

Select Pivot Table Design Tab
Select Subtotals / Do not show subtotals
Select Grand Totals / Off for Rows and Columns

Microsoft Outlook 365: Pivot Tables Conditional Formatting

Practice Conditional Formatting

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Add another instance of Price into Values

Select C5:C15 and add a Data Bar

Right Click and choose Number Format from Sub Menu

Select Custom Format

Replace the word 'General' with ;;; which will blank out the text

Microsoft Outlook 365: Pivot Tables Conditional Formatting

Practice Conditional Formatting

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Click on Filter drop arrow for Row Labels

Choose More Sort Options

Select ascending or descending for Sum of Price

Sort on Salesperson and reset back to All

Drag Model down from Filter to under Make in Rows

Microsoft Outlook 365: Pivot Tables Conditional Formatting

Practice Conditional Formatting

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Drag Model back into Filter so it sits under Salesperson

Select the Design tab / Grand Totals / On for Rows and Columns

Right click on one of the values under Sum of Price

From Sub Menu select Show Values as

Choose % of Grand Total

Microsoft Outlook 365: Pivot Tables Conditional Formatting

Practice Conditional Formatting

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Rearrange Pivot Table as follows:

Remove Sum of Price 2

Move Salesperson and Month into Columns

Make should stay in Rows

Price should stay in Values

From Sub Menu select / Show Values as / No Calculation, this should result in lots of empty cells

Microsoft Outlook 365: Pivot Tables Conditional Formatting

Practice Conditional Formatting

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Select Pivot Table Analyze Tab

Select Options drop down and choose Options

For empty cells show 0

Select B7:J17

Apply Conditional Formatting / Colour Scales

Microsoft Outlook 365: Pivot Tables Conditional Formatting

Practice Conditional Formatting

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Clear Conditional Formatting / Colour Scales

Select B7:J17

Apply Conditional Formatting

Highlight Cell Rules

Greater Than 50000

Green Text with Green Fill

Select B7:J17

Apply Conditional Formatting

Highlight Cell Rules

Less Than 10000

Red Text with Red Fill

Microsoft Outlook 365: Pivot Tables Conditional Formatting

Practice Conditional Formatting

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Clear Conditional Formatting Rules:

Select Conditional Formatting

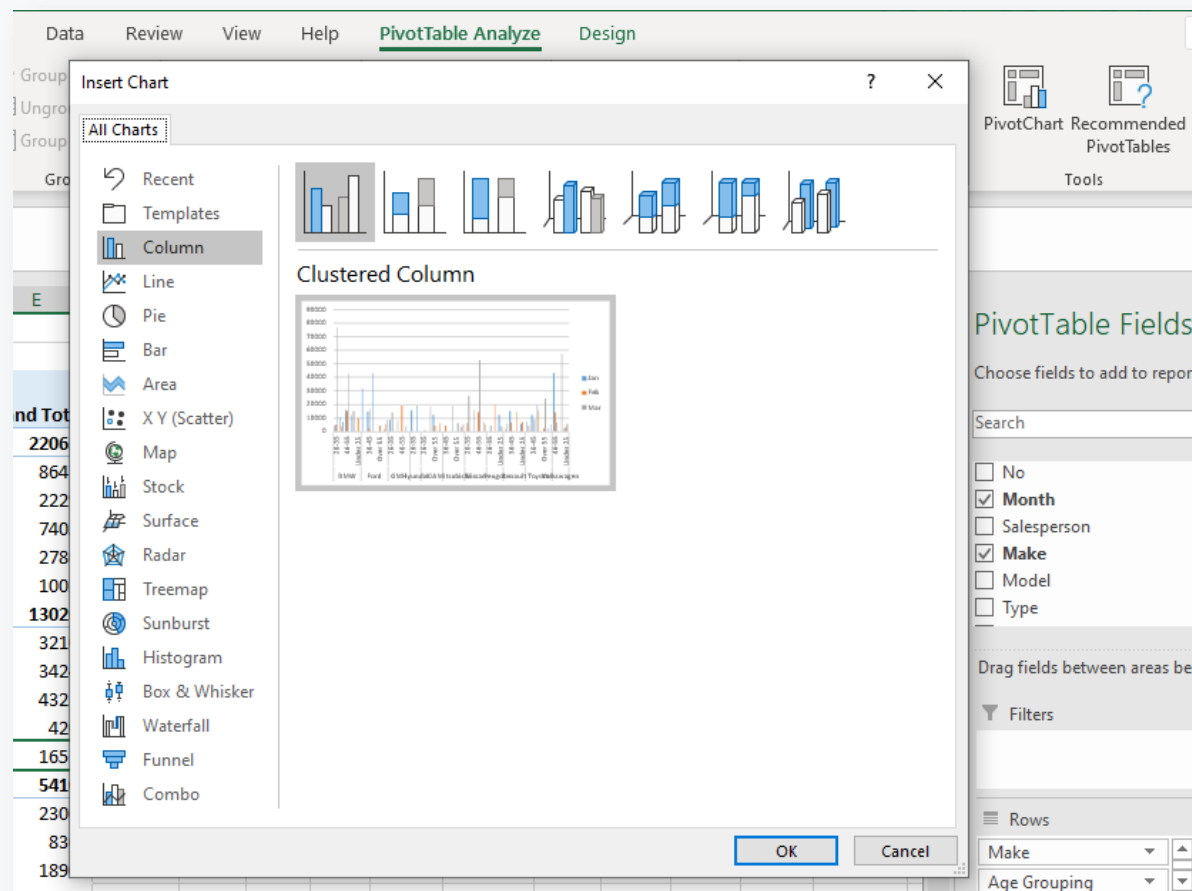
Clear Rules

Clear Rules From Entire Sheet

Microsoft Outlook 365: Pivot Charts

Demo 10: Pivot Charts

File 'PivotTable Features_2' – 'PivotTable' Worksheet

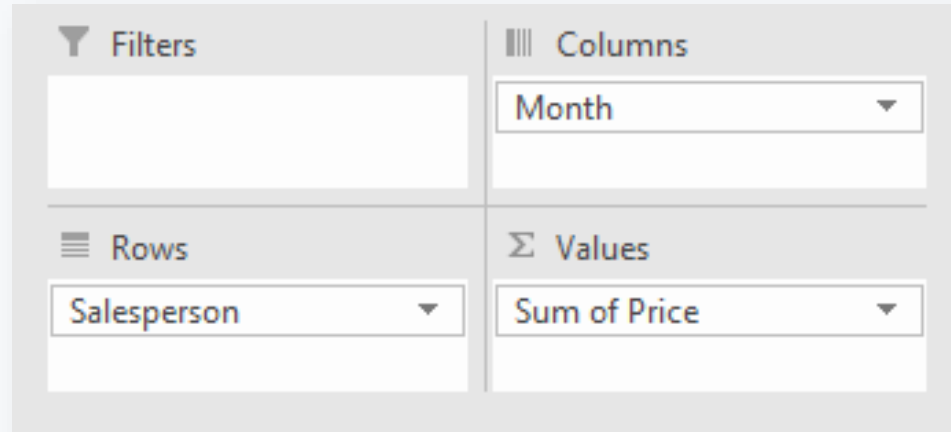


Microsoft Outlook 365: Pivot Charts

Practice Pivot Charts

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Rearrange the PivotTable Fields as below:



Filters	Columns
	Month

Rows	Values
Salesperson	Sum of Price

Click into Pivot Table

Select the 'PivotTable Analyze' tab

Click on the 'PivotChart' button in the 'Tools' group

Select a 'Clustered Column' Chart

Move and Resize Chart

Microsoft Outlook 365: Pivot Charts

Practice Pivot Charts

File '*PivotTable Features_2*' use '*PivotTable*' worksheet

Select the 'Data Sheet' worksheet
Change some of the values in the 'Price' Column

Select the 'Sheet1' worksheet
Right Click into the Pivot Table and choose 'Refresh'

Note the 'Salesperson' and 'Month' Filters on the Chart.....

Replace 'Salesperson' with 'Make'

Try some other combinations....

Microsoft Outlook 365: Pivot Tables

In Your Own Time

[LinkedIn Learning - Excel: PivotTables in Depth](#)

By Curt Frye

Includes:

Creating and Pivoting PivotTables

Summarising PivotTable Data

Sorting and Filtering PivotTable Data

Formatting PivotTables

Apply Conditional Formats to PivotTables

Creating and Formatting PivotCharts

Printing PivotTables

Manipulating PivotTables

Enabling and Adding Tables to the Data Model

Microsoft Outlook 365: Pivot Tables

In Your Own Time

[LinkedIn Learning - Excel: Mastering PivotTables and PivotCharts](#)

By Chris Dutton

Includes:

Getting Started

PivotTable 101

PivotTable Formatting

Sorting, Filtering and Grouping

Calculated Values, Fields and Items

Visualizing Data with PivotCharts

Thank you



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