

Quick Reference Card – Microsoft Excel 2007 – Creating Pivot Tables

Prepare the source data

Here are the suggested for setting up your Microsoft® Office Excel® 2007 worksheet for an Excel 2007 PivotTable® report:

Make certain each column has a heading. Column headings are used to name the fields in the PivotTable report (a **field** summarizes multiple rows of information from the source data).

Group similar data in each column. For example, text items in one column, numbers in another column, and dates in another column.

Remove any blank rows or columns.

Note If you open an Excel workbook created in a version prior to Excel 2007, and you create an Excel 2007 PivotTable report, the layout area will be in Classic PivotTable layout instead of in the Excel 2007 layout. To avoid this, follow these steps:

1. Save the data as an Excel 2007 file.
2. Close the workbook.
3. Open it again.
4. Create the PivotTable report.

If you do this before you create the PivotTable report, the layout will then be created as Excel 2007 layout.

Create a PivotTable report

1. Select a cell or range of cells.
2. Click the **Insert** tab. In the **Tables** group, click the arrow on **PivotTable**, and on the menu, click **PivotTable**.

The **Create PivotTable** dialog box opens.

3. **Select a table or range** is already selected for you. The **Table/Range** box shows the range of the selected data.
4. **New Worksheet** is also selected for you as the place where the report will be placed (you can click **Existing Worksheet** if you don't want the report placed in a new worksheet). Click **OK**.

On the left is the layout area ready for the PivotTable report, and on the right is the **PivotTable Field List**. This list shows the column titles from the source data: Each title is a field in the list.

5. In the field list, select the check boxes next to the fields that you want to add to the report.

Fields are automatically added to the report. Fields that are non-numeric are added to the Row Labels area of the report. As you add more non-numeric fields, Excel places them on the inside of fields already on the PivotTable report, building a hierarchy. Numeric fields are added on the right.

- To remove a field from the report, clear the check box next to the field name in the field list.
- To remove all the fields from a report so that you can start over again, click the **Options** tab on the Ribbon under **PivotTable Tools**. In the **Actions** group, click the arrow on the **Clear** button, and then select **Clear All**.
- To delete the entire report, click the **Options** tab. In the **Actions** group, click the arrow on **Select**. Click **Entire Table**. Then press DELETE.

Sort a field

Right-click a cell in the field you want to sort. Point to **Sort**, and then click an option. For example, click **Sort Largest to Smallest** or **More Sort Options**.

Group a field

You can group data that contains dates or times by following these steps. To manually group selected items, see the Help topic about grouping under **See also**, above.

1. Right-click a cell in the field you want to group, and then click **Group**. In the **Grouping** dialog box, select an option, and then click **OK**.
2. To ungroup, click in the grouped field, right-click, and then select **Ungroup**.

Add a report filter

Use a report filter to focus on a subset of data in the report, often a product line, a time span, or a geographic region.

In the **PivotTable Field List**, right-click a field name, and then select **Add to Report Filter**.

Pivot a report

When you pivot a PivotTable report, you transpose the vertical or horizontal view of a field, moving rows to the column area or moving columns to the row area.

Right-click the field you want to pivot. Point to **Move**, and then select **Move "field name" to Columns**, or select **Move "field name" to Rows**.

Move a PivotTable report to another location

1. Click the PivotTable report.
2. Click the **Options** tab on the Ribbon under **PivotTable Tools**. In the **Actions** group, click **Move PivotTable**.

The **Move PivotTable** dialog box opens.

3. Under **Choose where you want the PivotTable report to be placed**, either select **New Worksheet**, or in the **Location** box for **Existing Worksheet**, type the first cell in the range of cells where you want to locate the PivotTable report. Then click **OK**.

Print a PivotTable report

To set printing options, click in the PivotTable report. Click the **Options** tab on the Ribbon under **PivotTable Tools**. In the **PivotTable** group, click **Options**. In the **PivotTable Options** dialog box, on the **Printing** tab, select the options you want.



www.TrainerGuy.com

Have Knowledge Will Travel