Excel: PivotTables – Beyond the Basics

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Excel: Pivot Tables – Beyond the Basics

Mike Thomas

Mike Thomas: The Excel Trainer

Mike Thomas has worked in the IT training business since 1989. He is a subject matter expert in a range of technologies including Microsoft Office and Apple Mac.

In 2012 Mike founded theexceltrainer.co.uk where he has produced nearly 200 written and video-based Excel tutorials.

He has recorded several Excel training courses for pluralsight.com and in his career delivered hundreds of courses and webinars on a wide variety of technology-related topics.

Mike is a Fellow of The Learning and Performance Institute and has worked with and for a large number of global and UK-based companies and organizations across a diverse range of sectors.

In addition to training, he also designs and develops Microsoft Office-based solutions that automate key business tasks and processes.

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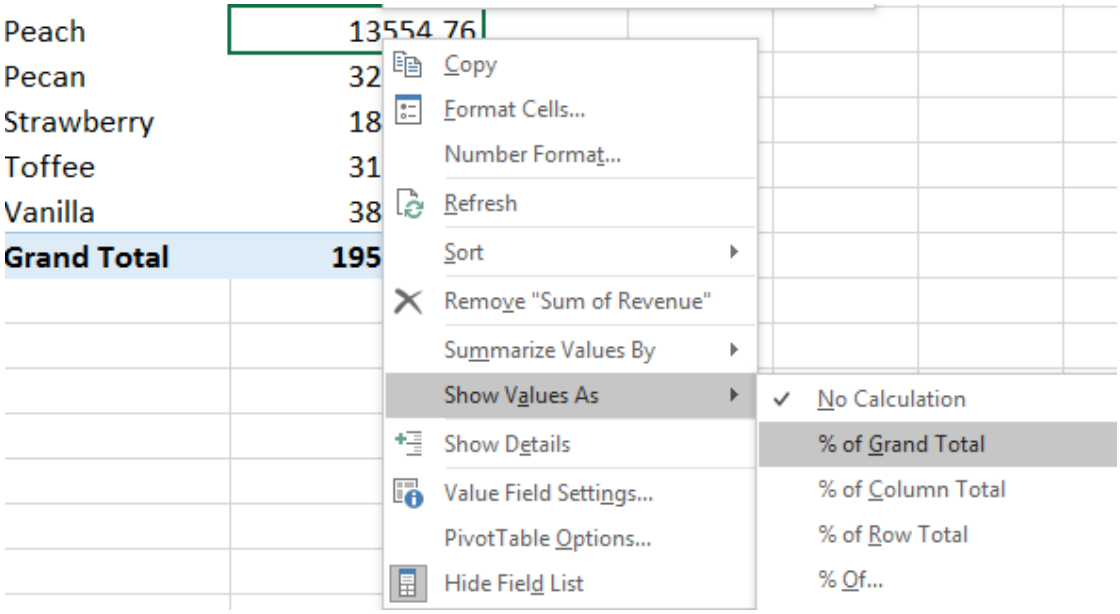
Display Numbers as a Percentage of the Total

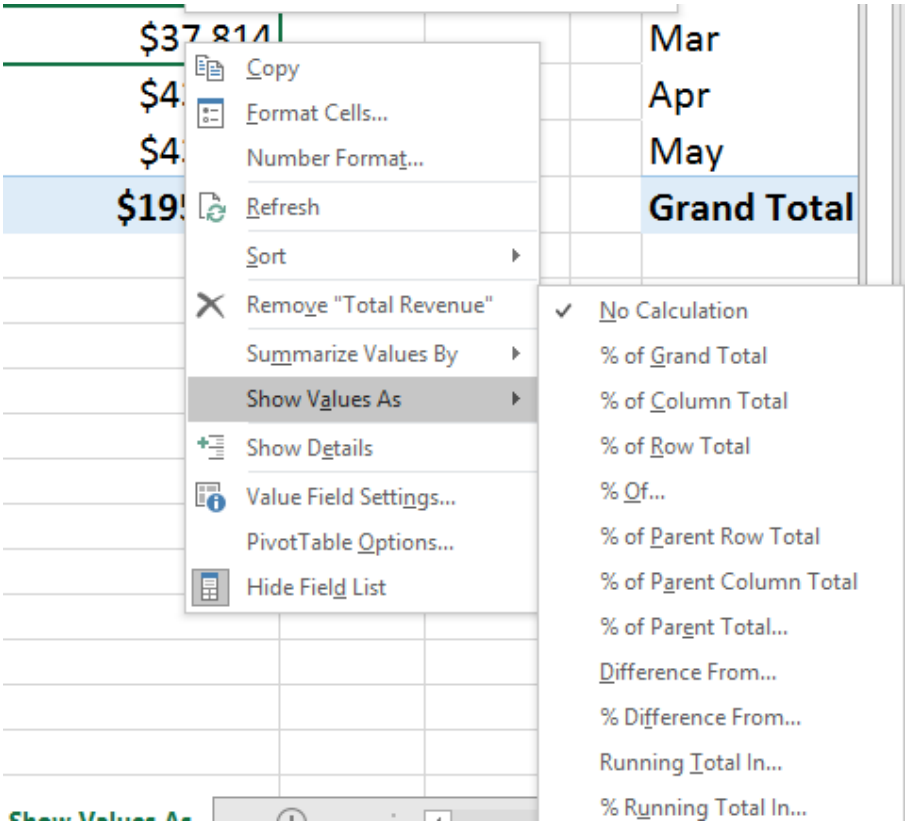
- Right click any of the numbers in the column containing the numbers to be changed
- Select **Show Values As**
- Select **% of Grand Total** (or any other desired option)



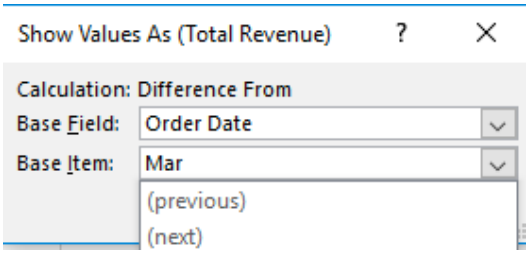
Note: to display the original numbers and the percentages, drag a second instance of the column into the values section in the Pivot Table Fields Panel

Display Numbers as a Difference

- Right click any of the numbers in the column containing the numbers to be changed
- Select **Show Values As**
- Select **Difference From** (or % Difference From)



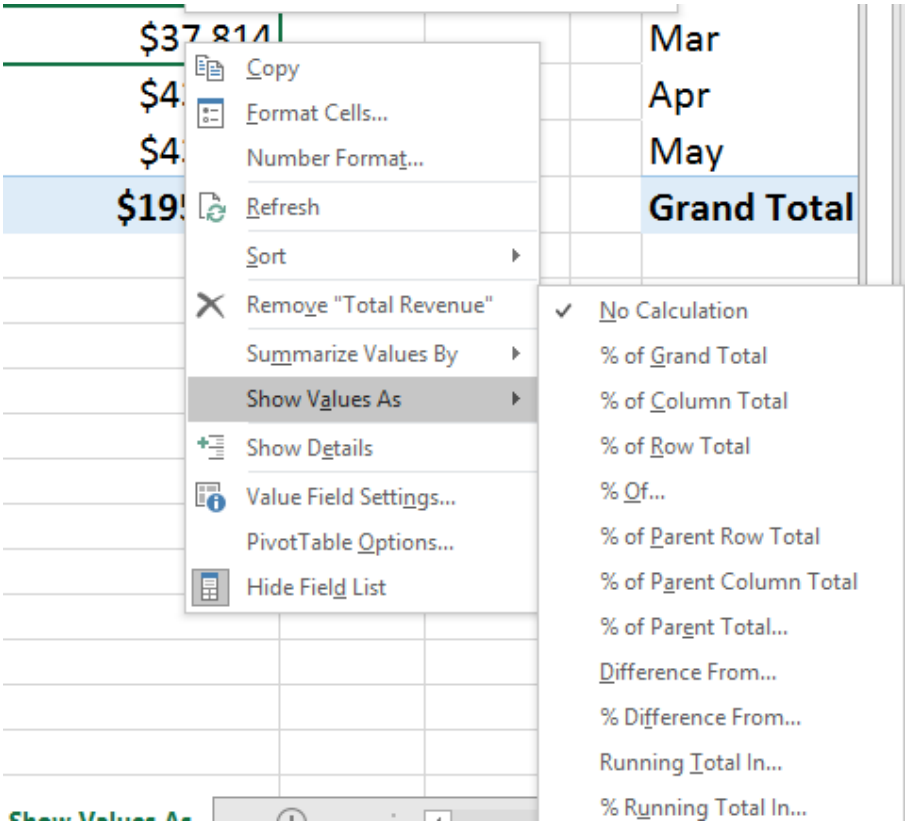
Note: to display the original numbers as well, drag a second instance of the column into the values section in the Pivot Table Fields Panel



- Select the appropriate values from the Base Field and Base Item dropdowns

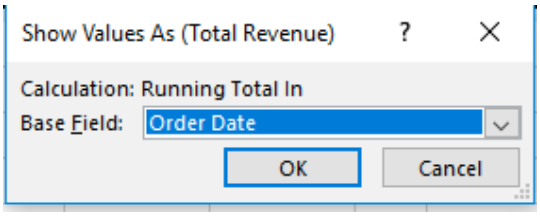
Display a Running Total

- Right click any of the numbers in the column containing the numbers to be changed
- Select **Show Values As**
- Select **Running Total in**



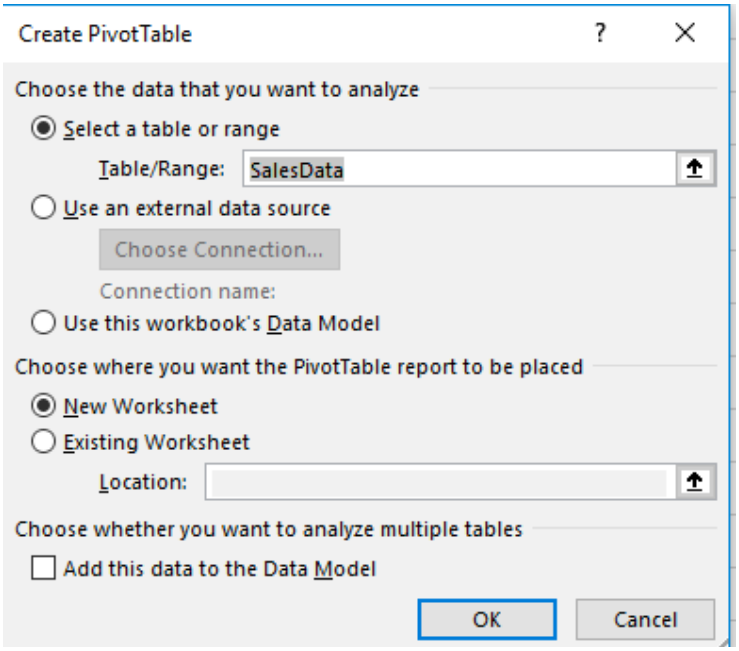
Note: to display the original numbers as well, drag a second instance of the column into the values section in the Pivot Table Fields Panel

- Select the appropriate value from the Base Field dropdown

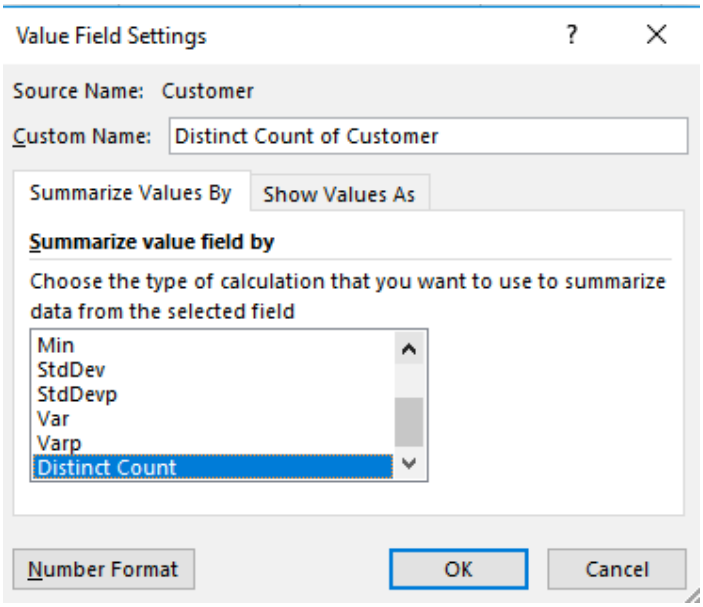


Display a Unique Count (2013 and 2016)

- Ensure that when the pivot table is created, the **Add to Data Model** box is ticked



- Right click one of the numbers in the Count column of the pivot table
- Select **Summarize Values By**
- Select **More Options**



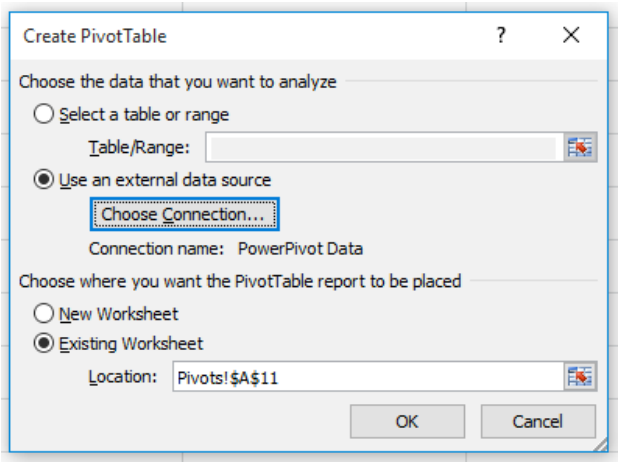
- Scroll down the list of Summary operators and select **Distinct Count**

Display a Unique Count (2010)

- Download and install the Power Pivot addin (https://www.microsoft.com/en-us/download/details.aspx?id=29074)

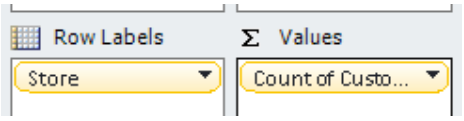
- Ensure that the data is stored as a Table (**CTRL+T** or **Insert** > **Table**)
- From the Ribbon select **PowerPivot** > **Create Linked Table**
- The table has been added to the Data Model
- Close the PowerPivot window

- Select the cell where the pivot table will be located
- Select **Insert** > **Pivot Table**



- Select **Use External Data Source**
- Click the **Use Connection** button
- Click **PowerPivot Data** (top item in the list)
- Click **Open**
- Select the location for the pivot table and click **OK**

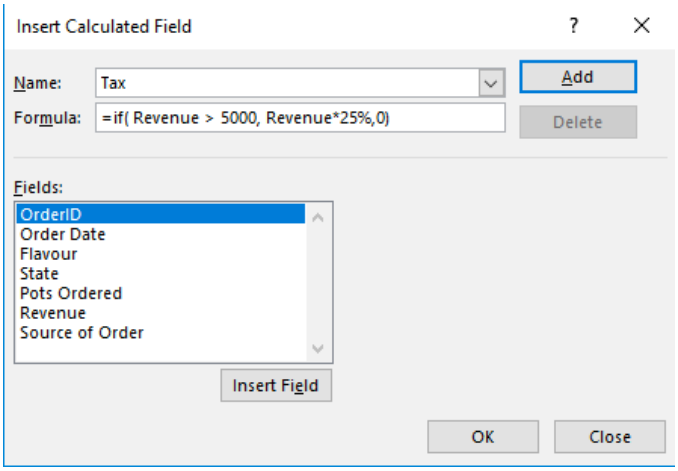
- Add the fields to the Row/Column/Value sections as normal
- Click the dropdown arrow next to the field to be counted (in the Values section)



- Select **Edit Measure**
- Select **DistinctCount** from the list

Adding a Calculated Field

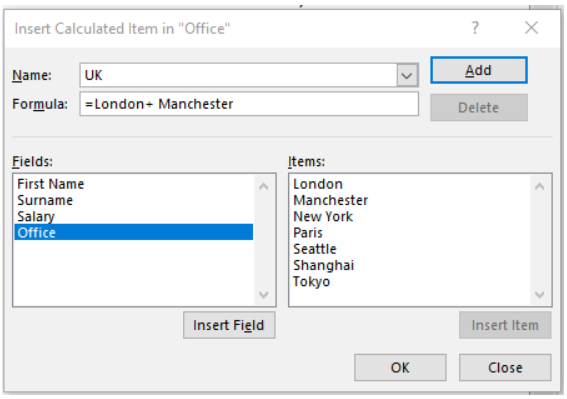
- Click the Analyze tab (Options tab in Excel 2007/2010)
- Click **Fields, Items and Sets**
- Click **Calculated Field**



- Type a name for the new field
- Type the appropriate formula for the field
- Click **OK**

Adding a Calculated Item

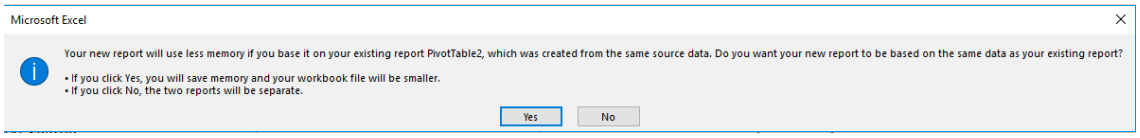
- Select a cell in the column to be grouped/calculated
- Click the Analyze tab (**Options** tab in Excel 2007/2010)
- Click **Fields, Items and Sets**
- Click **Calculated Item**



- Type a name for the new field
- Type the appropriate formula for the field using the appropriate field values
- Click **OK**

Create a Pivot Table Based on a Separate Cache

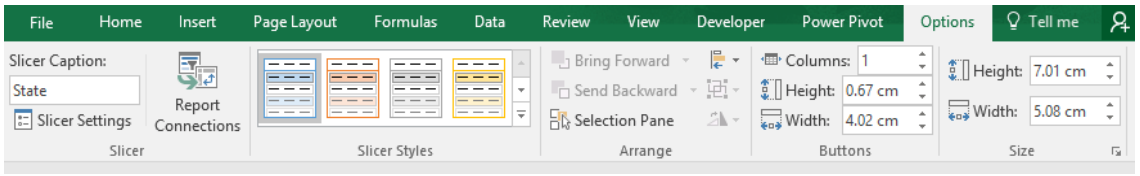
- Place cursor in a blank cell
- Press **ALT+D**
- Press **P**
- Click **Microsoft Office Excel list or database**, and then click **Next**
- Select the range of data (or Table) on which you want to base the new PivotTable report, and then click **Next**



- When the PivotTable and PivotChart Wizard displays a message asking if you want to share the data cache, click **No**
- Select a location for the new PivotTable report, and then click **Finish**

Slicers

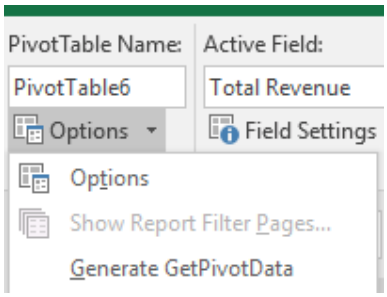
- Select a cell in the pivot table that the slicer is to be based on
- Click the **Analyze** tab (**Options** tab in Excel 2007/2010)
- Click **Insert Slicer**
- Select the field(s) that the Slicer(s) is/are to be based on



- Attach the Slicer to another pivot table: Use the **Report Connections** button
- Change the Slicer colour: Use the **Slicer Styles**
- Display the Slicer buttons in multiple columns: Use the **Columns** box
- Lock Slicer: Right click the Slicer > **Size & Properties** > **Position and Layout**

GetPivotData

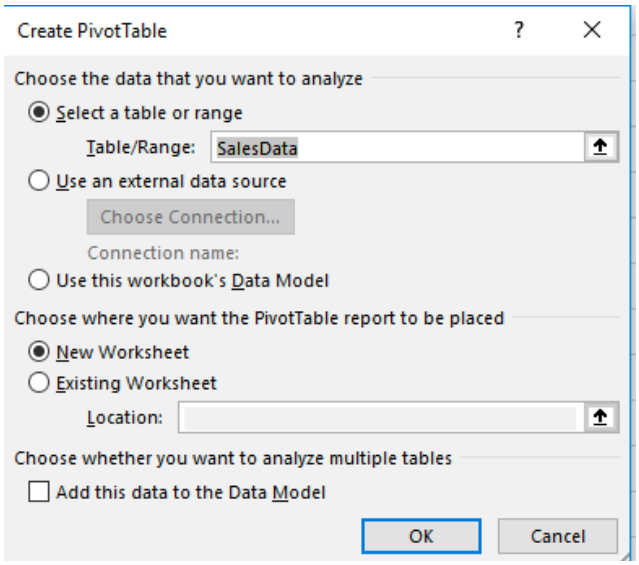
- Switch on and off by clicking **Generate GetPivotData** on the **Options** button on the **Analyze** tab (**Options** tab in Excel 2007/2010)



When enabled, clicking on a cell within a pivot table whilst creating a formula, generates a GETPIVOTDATA function to reference the cell

Create a Pivot Table from Multiple Tables

- Ensure that when the pivot table is created, the **Add to Data Model** box is ticked



- Click **All** at the top of the Pivot Table Fields List

- Define a relationship between the tables

Additional Resources

Downloadable Videos and PDF's: http://theexceltrainer.co.uk/reportsresources

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