



DAISEY Technical Assistance Brief

Excel Desk Reference – Using Pivot Tables

Purpose of this brief

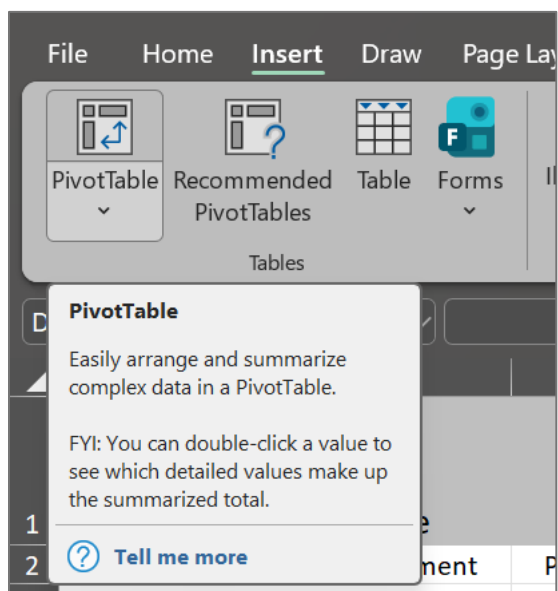
Pivot tables allow you to summarize and display data in a table, without requiring you to use formulas. You can arrange and filter data to see only what you are looking for. You can also adjust the arrangement of the data in the table and also change how it is summarized (count, sum, average, etc.).

Create a Pivot Table

To begin, click in any cell containing data.

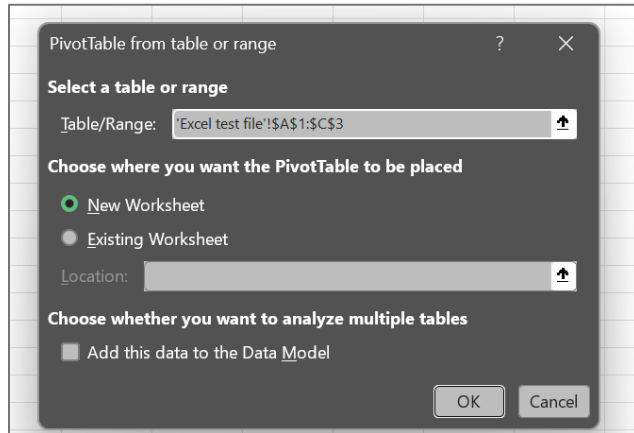
Click on the **Insert** tab then click on the **Pivot Table** button (Figure 1).

Figure 1: Example screenshot of **Pivot Table** button and tooltip that displays when button is selected



Excel will open the Pivot Table dialog box and automatically select all of the data in the worksheet as the range for the pivot table (Figure 2).

Figure 2: Example screenshot of pivot table dialog box with data selection and location options

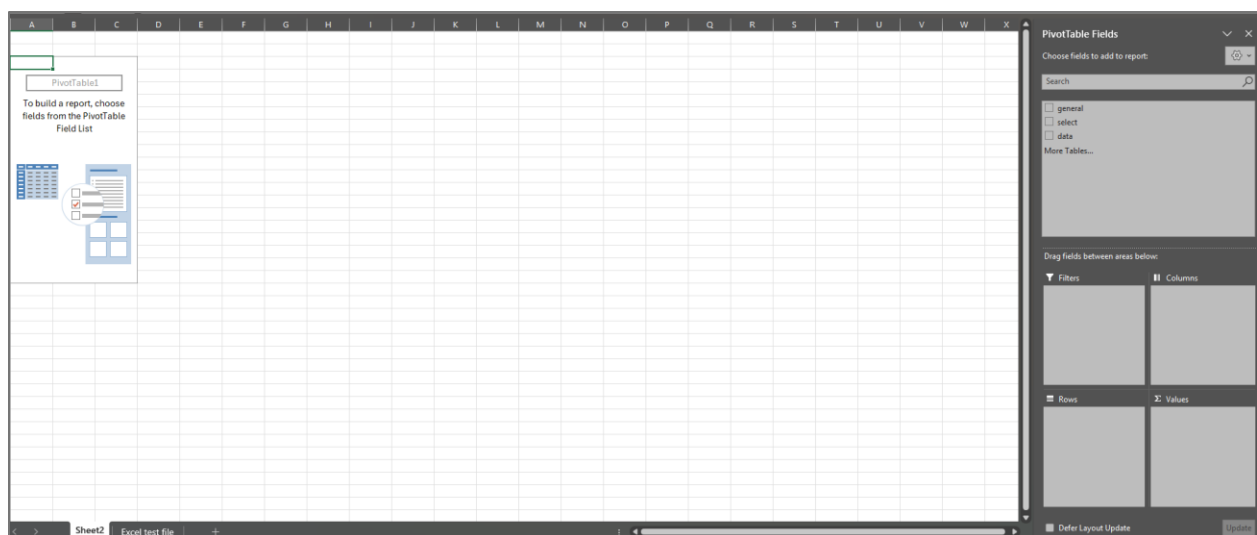


Select the location for the pivot table.

Excel defaults to putting the pivot table in a new worksheet (Figure 3). If you are ok with this, click **OK**.

If you want to select an existing worksheet for the pivot table, select **Existing Worksheet**, then indicate the location of the first cell of the destination in the location box. (Place your cursor in the location box, and click on the worksheet and cell). Click **OK**

Figure 3: Example of new worksheet Excel will create for the Pivot Table by default



Next, assign fields to the various parts of the pivot table by dragging a field from the list into one of the four areas.

Filter: Here you can summarize what is shown in the pivot table by filtering.

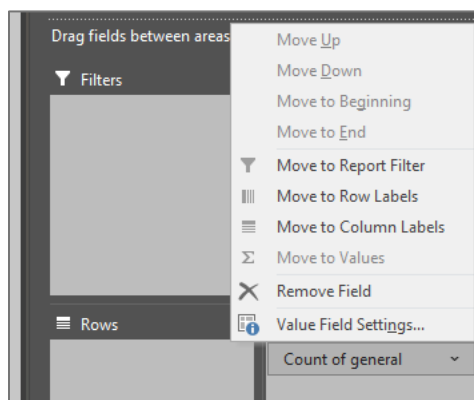
Columns: Fields placed in this area will be the columns of the pivot table.

Rows: Fields in this area will be the rows of the pivot table.

Values: Fields in this area are the data that will be summarized and presented in the cells of the pivot table.

Note: Excel shows a count by default, but you can select to see sums, averages, and more. Click on the arrow to the right of the field name, then select **Value Field Settings** to change how the data is summarized (Figure 4).

Figure 4: Example screenshot of Pivot Table value field menu



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Direct questions to the DAISEY help desk: daiseyadmin@ku.edu