# ExcelShir

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## EXCELSHIR CHEAT SHEET:
# PIVOT TABLES

| TOPIC | CONCEPT | DESCRIPTION |
|---|---|---|
| **A** 5 Basic Elements of Pivot Tables | 1. Field List | • Category of data (columns from data table). |
| | 2. Row Labels | • How to group your data (displayed vertically). |
| | 3. Values | • Summarized data (SUM, AVG, COUNT, etc.) about a particular category. |
| | 4. Column Labels | • How to group your data (displayed horizontally). |
| | 5. Report Filter | • Selectively show/hide specific data in your Pivot Table. |
| **B** 5 Drawbacks of NOT Using Pivot Tables | 1. Increase Chance of Errors | • Humans make mistakes; computers only do if we give them bad instructions. |
| | 2. Wasted Time | • All other methods of data analysis require multiple time-consuming steps. |
| | 3. Information Overload | • Too much information hides the key takeaways and creates confusion. |
| | 4. Difficult to Modify | • Change is inevitable in today's world. Why not be ready for it? |
| | 5. Tunnel Vision | • Wearing blinders may keep you on a track that you shouldn't be on in the 1st place. |
| **C** 5 Examples of When to Use Pivot Tables | 1. Find Quick Answer to a Question | • Throw a Pivot Table together in less than 60 secs, delete when finished. |
| | 2. Discover Hidden Trends | • Game-changing insights are buried inside your data. Dig them up with Pivot Tables. |
| | 3. Create Reports | • Perfect for single-use or recurring summaries of important information. |
| | 4. Create Dashboards | • Present all vital business metrics in one place & update them automatically. |
| | 5. Impress the Pants off your Boss! | • Mastery of Pivot Tables will give you instant "genius status." Trust me. |
| **D** 5 Key Benefits of Pivot Tables | 1. Quick Setup Time | • 5 Simple steps to create your Pivot Table in under 5 min (see below). |
| | 2. Powerful Analysis | • Lookup, calculate, group, & summarize millions of rows of data… in seconds. |
| | 3. Relevant Data | • Deliver a clear, concise, and intuitive message that requires no explanation. |
| | 4. Customizable | • Formatting & functionality tailor-made to suit your ever-changing business needs. |
| | 5. No manual work…ever again! | • "Set it and forget it!" – Ron Popeil. |
| **E** 5 Steps to Creating a Pivot Table (SAGES) | 1. **S**elect Data | • Choose the data you want to summarize, then insert a Pivot Table. |
| | 2. **A**sk Questions | • Ask specific questions about your data (Ex: Total sales in January in NYC?). |
| | 3. **G**roup Data | • Drag field(s) into Row Labels to group your data in a logical manner. |
| | 4. **E**xperiment | • Keep playing around until you find the answers to your questions. |
| | 5. **S**how Pivot Table | • Format your Pivot Table so it's clean, polished, and professional. |

Additional Resources:
**http://excelshir.com/resources**