ExcelShir
You'll see.

PIVOT TABLE WORKSHOP

Taught by Shir Aviv

Who am I?

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Who I've Worked With

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Finish this sentence…

I want to learn about
Pivot Tables because _____

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Class Overview

1. What is a Pivot Table and why should I care?
2. Example: LEGOs
3. Learning the lingo
4. Example: Salsa log
5. Case Study: How I made $70,000 using Pivot Tables
6. Workshop: How to create a Pivot Table (I Demo)
7. Workshop: Build your own Pivot Tables (You Do)
8. Workshop: Review answers (We Review)
9. Recap Discussion
10. Class Evaluation
11. Q & A

What is a Pivot Table?

Wikipedia:

"A **pivot table** is a table of grouped values that aggregates the individual items of a more extensive table (such as from a database, spreadsheet, or business intelligence program) within one or more discrete categories. This summary might include sums, averages, or other statistics, which the pivot table groups together using a chosen aggregation function applied to the grouped values."

Huh?

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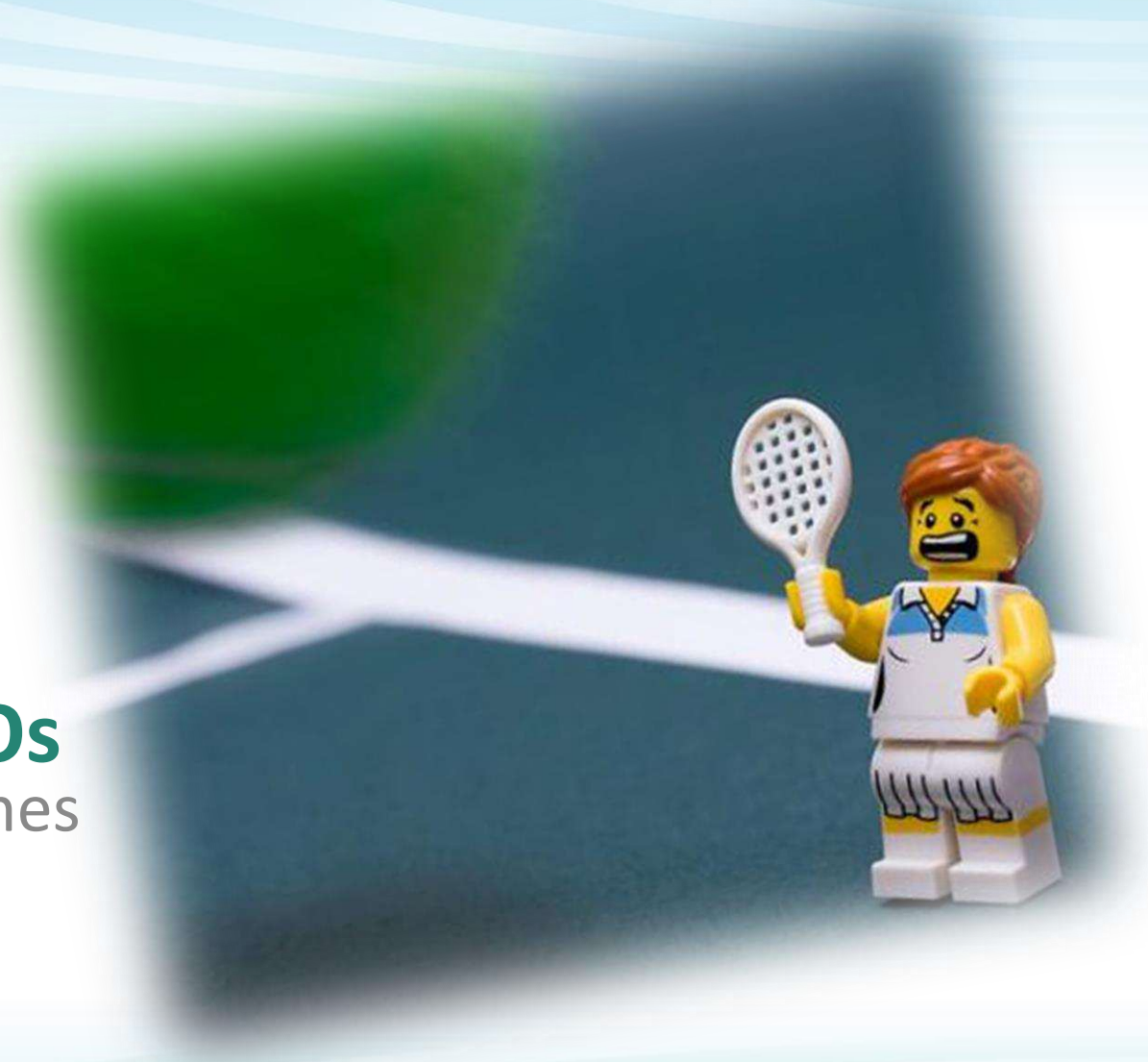
Example: LEGOs

Not Just Fun & Games



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Starts with a Question…

1. How many batches of Red LEGO bricks were manufactured? ***(Conditional Formatting)***
2. How many batches of LEGOs were manufactured in Kansas in 2018? ***(Sorting)***
3. What is the total number of green rectangular LEGOS that were manufactured after 12 pm? ***(Filtering)***
4. What is the average # of defective units that were produced in Florida in batches of over 5,000 units? ***(Advanced Formulas)***

What's Wrong With This?

1. Manual → Errors
2. Time Consuming
3. Information Overload
4. Difficult to Change
5. Tunnel Vision

You want me to do what???

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Learning the Lingo

What **should** have been taught in school…

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The Data Table

Columns

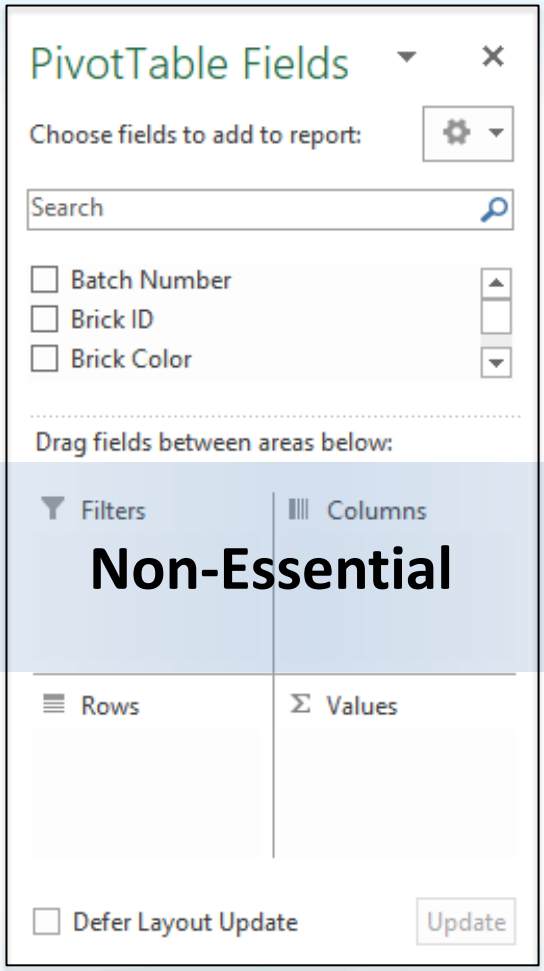
Batch Number	Brick Color	Length (mm)	Location Manufactured	Date Manufactured
10138	White	15.80	Vermont	03/23/20
10272	Blue	16.00	Texas	11/04/18
10303	White	16.00	Florida	04/18/19

Rows

- **Column** = Type of data / attribute / field / category
- **Row** = Individual record / particular instance of a specific member of the table

The Pivot Table Builder

1. **Fields** = Choose a category of data (same as columns from the data table)



5. **Filters** = Show/hide data in your Pivot Table

4. **Columns** = Group your data (displayed in columns)

2. **Rows** = Group your data (displayed in rows)

3. **Values** = Summarize your data (e.g. SUM, AVERAGE, COUNT, etc.)

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Example: Salsa Log

They used to call me “*Gringo Salsero*”

Pop Quiz

The key takeaway from the last example is:

A. Pivot Tables are not intimidating

B. Tracking side income is as easy as 1, 2, 3…5, 6, 7

C. People love nerdy white guys who can dance

D. All of the above

How I Made $70,000 Using Pivot Tables

Case Study: Legal Funding Inc.

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Let's Compare…

Before

1. Hundreds of errors
2. Slow & repetitive data entry
3. Inaccessible data
4. Tedious & limited reporting
5. Uninformed decisions

After

1. Zero errors
2. Fast & efficient data entry
3. Search data in seconds
4. Instant & unlimited reporting
5. Informed decisions

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How to Create a Pivot Table

1. **S**elect Data & Insert Pivot Table
2. **A**sk Questions
3. **G**roup Data
4. **E**xperiment
5. **S**how Pivot Table

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Workshop:

Build your own Pivot Tables

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Recap: *When* Should I Use a Pivot Table?

1. Find a Quick Answer to a Question
2. Discover Trends
3. Create Reports
4. Create Dashboards
5. Impress the Pants Off Your Boss!

Recap: *Why* Should I Use a Pivot Table?

1. Quick Setup Time
2. Powerful Analysis
3. Relevant Data
4. Customizable
5. No Manual Work…Ever Again!

Class Evaluation

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Questions?

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Thank You!

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