

Excel Shir

You'll see.

SPOTLIGHT

EXCEL PIVOT TABLES



Taught by Shir Aviv



Finish this sentence...

I want to learn about
Pivot Tables because _____

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. How I made \$70,000 using Pivot Tables
6. How to create a Pivot Table (I Demo)
7. Workshop: Build your own Pivot Tables (You Do)
8. Workshop: 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?



Example: LEGOs

Not Just Fun & Games



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???



Learning the Lingo

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

The Data Table

Columns

	Brick Color	Length (mm)	Date Manufactured
Rows {	Red	15.8	10/17/19
	Yellow	8	11/22/21
	Green	16	04/14/20

- **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

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

PivotTable Fields

Choose fields to add to report:

Search

Batch Number

Brick ID

Brick Color

Drag fields between areas below:

Filters Columns

Non-Essential

Rows Values

Defer Layout Update Update

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

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

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.

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

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

Memory Trick:

SAGES

Workshop: Build Your Own Pivot Tables

- Goodreads Dataset
- BONUS 1) Book Recommendations Dataset
- BONUS 2) Choose your own dataset

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



Questions?



Thank You!

