

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. 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?

mal



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 \rightarrow Errors
- 2. Time Consuming
- 3. Information Overload
- 4. Difficult to Change
- 5. Tunnel Vision



You want me to do what???



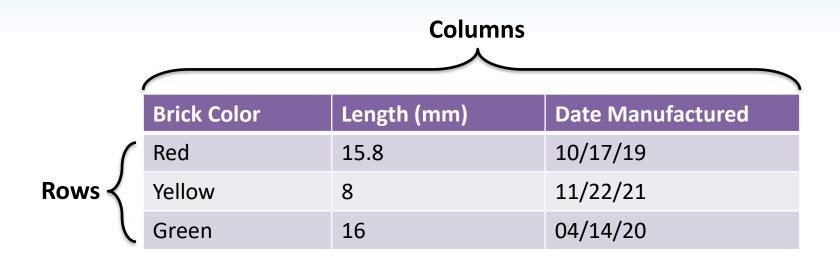


Learning the Lingo

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



The Data Table



- **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	Ŧ	×
Choose fields to add to report:		∯ ⊤
Search		P
 Batch Number Brick ID Brick Color 		•
Drag fields between areas below:		

▼ Filters III Columns Non-Essential ■ Rows Σ 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. Select Data & Insert Pivot Table 2. Ask Questions 3. **G**roup Data Memory Trick: SAGES 4. Experiment 5. Show Pivot Table



Workshop:

Build your own Pivot Tables



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!









Thank You!



