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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

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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

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)*

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What's Wrong With This?

1. Manual → Errors

2. Time Consuming

3. Information Overload

4. Difficult to Change

5. Tunnel Vision

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You want me to do what???

Learning the Lingo

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

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The Data Table

Columns

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

Rows

- **Column** = Type of data / attribute / field / category

- **Row** = Individual record / particular instance of a specific member of the table

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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)

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

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

Non-Essential

PivotTable Fields

Choose fields to add to report:

Search

☐ Batch Number
☐ Brick ID
☐ Brick Color

Drag fields between areas below:

▼ Filters   IIII Columns

≡ Rows   Σ Values

☐ Defer Layout Update   Update

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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

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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

Memory Trick:
SAGES

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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!

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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!

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Questions?

Thank You!