# ExcelShir You'll see.



**SPOTLIGHT** 

#### **EXCEL PIVOT TABLES**



Taught by Shir Aviv



## Who am I?





#### Who I've Worked With



SAATCHI & SAATCHI





Bloomberg

J.P.Morgan







**RENT THE RUNWAY** 















#### 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. 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."







#### 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

Columns

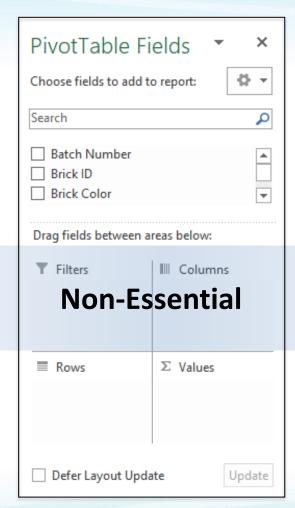
	Columns				
	Batch Number	Brick Color	Length (mm)	Location Manufactured	Date Manufactured
Rows $\left\{ \right.$	10138	White	15.80	Vermont	03/23/20
	10272	Blue	16.00	Texas	11/04/18
	10303	White	16.00	Florida	04/18/19

- 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)



- 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. Group Data
- 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!



#### **Class Evaluation**



## Questions?





## Thank You!



