

# ExcelShir

*You'll see.*

SPOTLIGHT

## EXCEL PIVOT TABLES



Taught by Shir Aviv



# Who am I?



# Who I've Worked With

**Publicis**  
**LifeBrands**  
Medicus

SAATCHI  
&  
SAATCHI

diadeis   
creating brand efficiency

**HUGE**

**Bloomberg**

J.P.Morgan

DonorsChoose.org

**About.com**

**NYIT**  
NEW YORK INSTITUTE OF TECHNOLOGY

RENT THE RUNWAY

L'OCCITANE  
EN PROVENCE

 **Prudential**

**vimeo**

**Etsy**

**AMERICAN  
EXPRESS**

**REBAG**

 **ExcelShir**  
You'll see.

# 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.”

# 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					
Rows	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

- **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. **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

# 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!

