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JPro Presents

SPOTLIGHT

EXCEL PIVOT TABLES

Taught by Shir Aviv

Who am I?

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Who I've Worked With

Publicis LifeBrands Medicus

SAATCHI & SAATCHI

diadeis
creating brand efficiency

HUGE

Bloomberg

J.P.Morgan

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NYIT
NEW YORK INSTITUTE OF TECHNOLOGY

RENT THE RUNWAY

AVON
the company for women

Prudential

ADP

vimeo

AMERICAN EXPRESS

REBAG

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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. 10 Minute Break
7. Mini-Workshop: Build Your Own Pivot Tables
8. Recap Discussion
9. Class Evaluation
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."

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Huh?

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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)*

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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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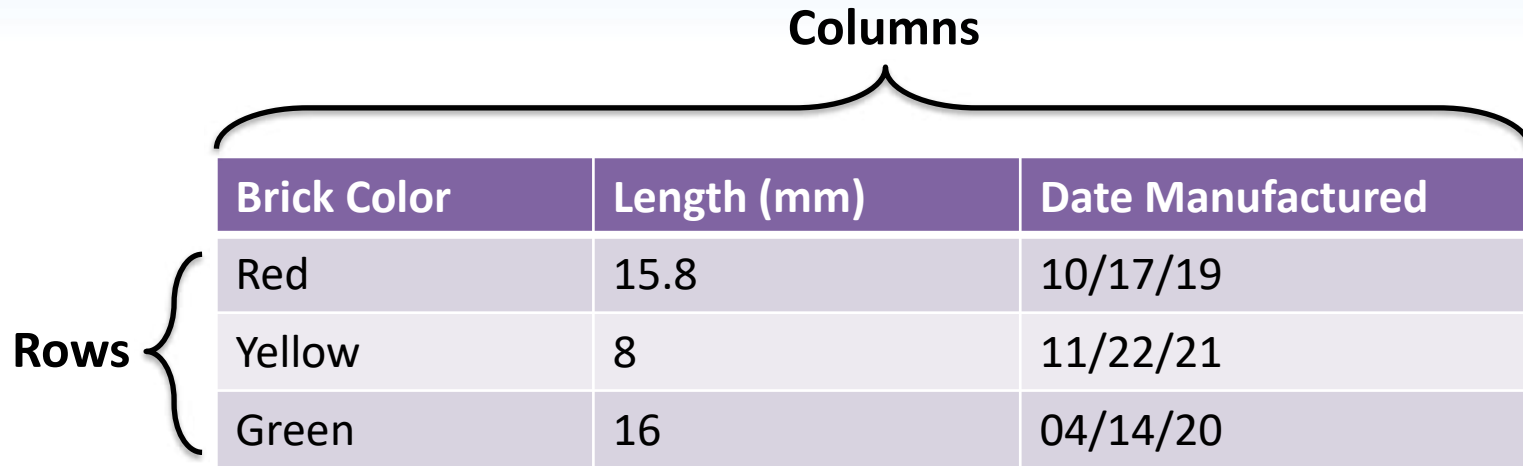*You'll see.*

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

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	Σ Values

☐ Defer Layout Update — Update

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.)

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Example: Salsa Log

They used to call me *"Gringo Salsero"*

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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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How I Made $70,000 Using Pivot Tables

Case Study: Legal Funding Inc.

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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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10 Minute Break

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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Mini Workshop: Build Your Own Pivot Tables

Remember SAGES...

1. **S**elect Data & Insert Pivot Table
2. **A**sk Questions
3. **G**roup Data
4. **E**xperiment
5. **S**how Pivot Table

Create 1 Pivot Table to Answer Each Question:

1. **How many restaurants are there of each cuisine type? (Hint: use Count, not SUM)**
2. **Which neighborhood is the most expensive?**
3. **Which restaurants have a rating of 4 or above and recommend reservations? (Hint: use Restaurant Name, not cuisine type)**
4. ***Show a breakdown of the average price per person of restaurants that contain the word "American" in their cuisine type, broken down by formality level, and only located in Manhattan (City = "New York").**
5. **Ask your own question and answer it using a pivot table.**

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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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Class Evaluation

Questions?

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Thank You!