

# C&NS Spring '07 Software Training

## Microsoft Excel 2003: Summarizing and Analyzing Data

### *Part 3: Analyzing Further: Pivot Tables*



# Session Breakdown

- Handouts
- The Parts
  - Pivot Tables Primer
  - Pivot Tables
  - Creating Pivot Tables
  - Moving Fields Around
  - Formatting a Pivot Table
  - Using other Pivot Table options
  - Summing up in different ways
  - Creating PivotChart Reports
- Review

# Pivot Tables Primer

- Navigating
- Selecting Cells and Worksheets
- Formula Basics
- Inserting Functions

# Pivot Tables

- Helps make large amounts of data easy to understand
- Can recognize trends and patterns based on the different views that can be created by **you!**
- You can “Pivot” data by swinging it into the Pivot Table Layout

# [ Creating Pivot Tables ]

- To compare data and their meanings, begin by asking yourself questions: what do you want to accomplish?
- Use the Pivot Table wizard to prepare your data for the new view
- Drag and drop your data into the new PivotTable report.
  - There is no wrong way to pivot data!

# [ Creating Pivot Tables ]

- Creating a PivotTable report is about moving pieces of information around to see how they fit together
- Don't worry about what's going on behind the curtain
- Example 1
- Exercises 1-5

# Moving Fields Around

- Check your source data:
  - Column Headings
  - No empty rows or columns
- Ask yourself what you need to figure out
- Where data goes on the Layout: Drop Areas
  - Row Fields
  - Column Fields
  - Page Fields
  - Data Items
- Don't worry about arranging a layout the wrong way!

Example 1  
Exercises 1-5

# Formatting a Pivot Table

- Changing Field headings
- Changing the Sort order
- Formatting Numbers
- Refreshing Data:
  - Pivot Table Reports **do not** update automatically!
- Change how data is Summarized
- Delete a Pivot Table report

**Exercises 1-6**

# Using other Pivot Table Options

- Add another Field
- Create Groups
- Trading Field places
- Displaying Information

**Exercises 1-5**

# [ Summing up in different ways ]

- Change how fields are summarized
- Format the Report
- Display numerical data as a percentage of the total

## Exercises 1-3

# Creating PivotChart Reports

- A **PivotChart** is a chart that graphically represents data in a PivotTable report
- They can only be created from an existing PivotTable report
- Manipulate the chart data to arrive at different views

## Exercise 1

# [ Analyzing Further: Pivot Tables ]

- Questions??
- Please fill out the Training Survey!  
<http://data.fairfield.edu/cns/workshop/>
- [www.fairfield.edu/cnstraining](http://www.fairfield.edu/cnstraining) for reference materials.
- [cnstraining@mail.fairfield.edu](mailto:cnstraining@mail.fairfield.edu) for comments and questions.

**Thank You!!**