



Training

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Quick Reference Card - PivotTable III: Show off your PivotTable skills



Add fields to Add fields from the **PivotTable Field List**. If the list is not visible, click inside the report area.

PivotTable® reports

- You don't have to undo an existing report to add another field.
- You can drag more than one field onto any of the drop areas on the report. For example, you can have more than one row field. You can also use the same field more than once on a report, even in the same drop area.

A PivotTable report with more than one row field has one **inner** row field, the one closest to the data area. Any other row fields are **outer** row fields.

An inner or outer position determines how many times the items within the row field are repeated in the report. Items in the outermost row field are displayed only once, but items in the rest of the row fields are repeated as necessary.

Group data


You can use grouping to view less detailed summaries—for example, to view data by quarter instead of by day.

1. Right-click anywhere in the field you want to group.
2. Point to **Group and Show Detail** on the shortcut menu, and then click **Group**.
3. In the **Grouping** dialog box, select the option you want, and clear any option you do not want. Then click **OK**.


To ungroup data, right-click the field, point to **Group and Show Detail**, and then click **Ungroup**.

Use a summary function other than SUM

To summarize information in the data area by using a summary function other than Sum (which is the default):

1. Click the data field heading or a cell within the data field, and then click the **Field Settings** button  on the **PivotTable** toolbar.
2. In the **Summarize by** list, select a different summary function, and then click **OK**.

Use a custom calculation to show data another way

1. Click in one of the cells in the data area.
2. On the **PivotTable** toolbar, click the **Field Settings** button  .
3. Click the **Options** button.
4. In the **Show data as** list, click the arrow, scroll down the list, and then make a selection such as **% of total**. Click **OK**.

Use a calculated field formula


Use calculated fields to enter your own formulas based on the information in the data area in a PivotTable report. For example, you could use a calculated field to figure out bonus amounts for salespeople.


1. Click anywhere inside the PivotTable layout.
2. On the **PivotTable** toolbar, click **PivotTable**, point to **Formulas**, and then click **Calculated Field**.
3. In the **Insert Calculated Field** dialog box, type a name for the formula in the **Name** box.
4. Enter the formula in the **Formula** box, selecting fields from the **Fields** list, and then click **OK**.

Tip To delete a calculated field, open the **Insert Calculated Field** dialog box again. In the **Name** box, click the downward pointing arrow. Select the name of the calculated field you want to delete in the drop-down list, and then click **Delete**.

Format a PivotTable report with an automatic format

You might use this type of formatting to make a report with more than one data field easier to read.

1. Click in the report, and then click the **Format Report** button  on the **PivotTable** toolbar.
2. Select a format in the **AutoFormat** dialog box.

To get the original formatting back, you would click the **Format Report** button  on the **PivotTable** toolbar, scroll down to the bottom of the **AutoFormat** dialog box, and select **PivotTable Classic**.

Tip

- Wait until you're through pivoting a report before applying this type of formatting. When the layout changes, pivoting the report may not work as you would expect.
- For information about other ways to format PivotTable reports, see Microsoft Excel Help.

GETPIVOTDATA function

GETPIVOTDATA retrieves data from the report and continues to do so even if the report layout changes.

The function appears automatically when you type an equal sign (=) outside of the report and then select a cell inside the report. If you remove any of the fields referenced in the GETPIVOTDATA formula from the report, the formula returns #REF!. If you do not want to use the function:

1. Type an equal sign (=) in a cell outside of the report.
2. Type the cell address that contains the value that you want to reference. **Do not select the cell, because this automatically inserts the GETPIVOTDATA function.**

You can also add a button to the **PivotTable** toolbar to turn the function on and off.

1. With a PivotTable report open, on the **PivotTable** toolbar, click the **Toolbar Options** arrow on the right end of the toolbar.
2. Click **Add or Remove Buttons**, click **PivotTable**, and then click **Generate GetPivotData**.

When you click in your worksheet, you'll see the **Generate GetPivotData** button on the toolbar. When selected, the button turns the function on. Select the button to turn the function on or off.