

# Excel Workshop Agenda

## January 20, 2009

### I. Pivot Tables - Excel 2007

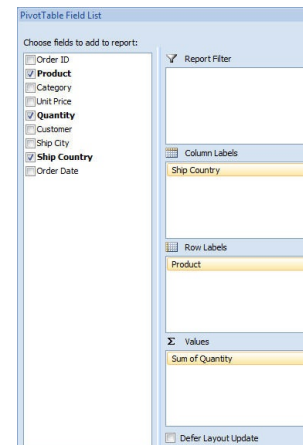
Pivot tables quickly summarize long lists of data. “Pivot tables are a hidden gem in Excel. They are just a convenient way to build intelligent, flexible summary tables - nothing more, and nothing less.” (From Excel 2007, The Missing Manual, by Matthew MacDonald). Avoid jargon, such as *cross-tabulated computations* and *n-dimensional analysis*, and use the PivotTable Wizard to convert a long list of data into a concise Pivot Table.

- Convert the List of Data into a Table
  - ▶ Select Range, then **Insert > Tables > Table**

	D	E	F	G	H
1	Unit Price	Quantity	Customer	Ship City	Ship Country
2	14	12	Vins et alcools Chevalier	Reims	France
3	9.8	10	Vins et alcools Chevalier	Reims	France
4	34.8	5	Vins et alcools Chevalier	Reims	France
5	42.4	40	Toms Spezialitäten	Münster	Germany
6	18.6	9	Toms Spezialitäten	Münster	Germany
7	42.4	35	Hanari Carnes	Rio de Janeiro	Brazil
8	7.7	10	Hanari Carnes	Rio de Janeiro	Brazil
9	16.8	15	Hanari Carnes	Rio de Janeiro	Brazil

- Prepare the Pivot Table
  - ▶ **Insert > Tables > PivotTable > Pivot Table** (if you don't have a Table), or
  - ▶ **Table Tools > Design > Tools > Summarize with PivotTable** (if you have a Table; this is better because new rows are added automatically)
  - ▶ Select New worksheet (easiest)

- Lay Out a Pivot Table (Example)
  - ▶ In the PivotTable Field List pane, drag Product field into Row Labels box
  - ▶ Drag the Ship Country field to the Column Labels box
  - ▶ Drag the Quantity field to the Values box



- Format a Pivot Table
  - ▶ **PivotTable Tools > Design > Layout** (also **PivotTable Styles, PivotTable Style Options**) to choose style, banding, and subtotals if there is grouping

Sum of Quantity	Column Labels	Grandma's Boysenberry Spread	Grand Total
Row Labels	Chocolade		
Alfreds Futterkiste		16	16
Antonio Moreno Taquería	15		15
Around the Horn	15		15
Bon app'		70	70
Bottom-Dollar Markets		12	12
<b>Grand Total</b>	<b>30</b>	<b>98</b>	<b>128</b>

- **Rearrange/Refresh a Pivot Table**
  - Move or remove a field by dragging header
  - Update (refresh) a Pivot Table with PivotTable Tools > Options > Data Refresh (Alt+F5)
  
- **(Advanced) Work With Multi-Layered Pivot Tables (more than 1 or 2 dimensions)**
  - Hide (collapse) or expand details
  - Add calculated field
  - Filter Pivot Table
  - Pivot Charts

## II Q & A

## III Topics From Earlier Agendas