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Pivot Table Prowess

Written and Presented by
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About the speaker:
David is owner of Accounting Advisors, Inc., an Atlanta-based spreadsheet consulting firm that he started in 1991. He shares his 20+ years of hard-fought Excel knowledge by way of consulting engagements, freelance articles, and public speaking. David offers spreadsheet consulting and training services nationwide.

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Please Ask Questions Today

- These webcasts are designed to be interactive. Some of the best learning comes from questions from the audience, and I'm here to help you.

- I often incorporate the answers to questions that get raised into future sessions of this webcast, so your questions might improve this presentation for others in the future.

- Please feel free to email questions to **david@acctadv.com** after the presentation as well.

Excel Versions
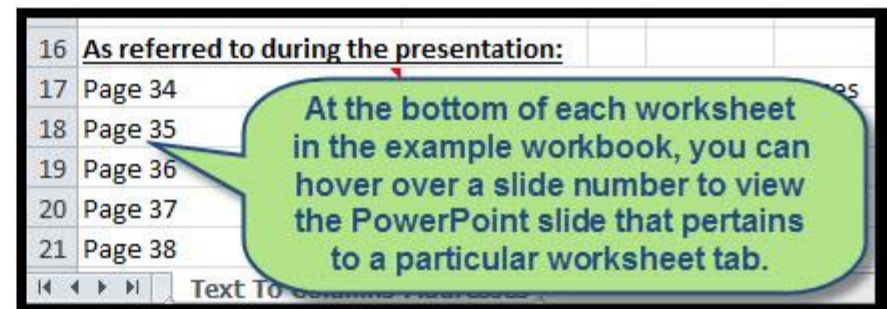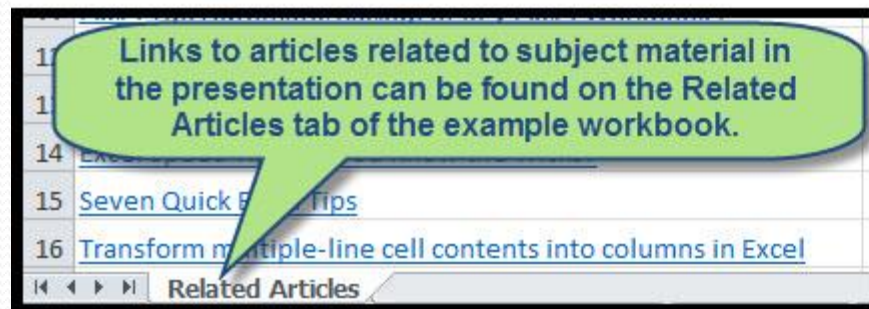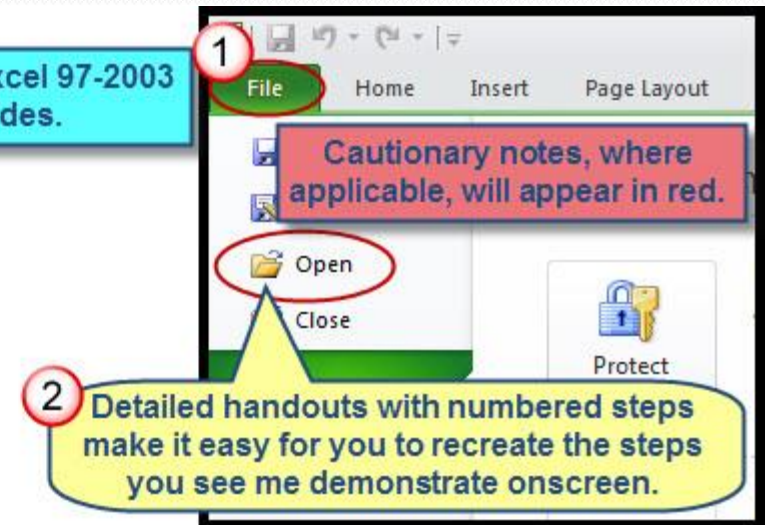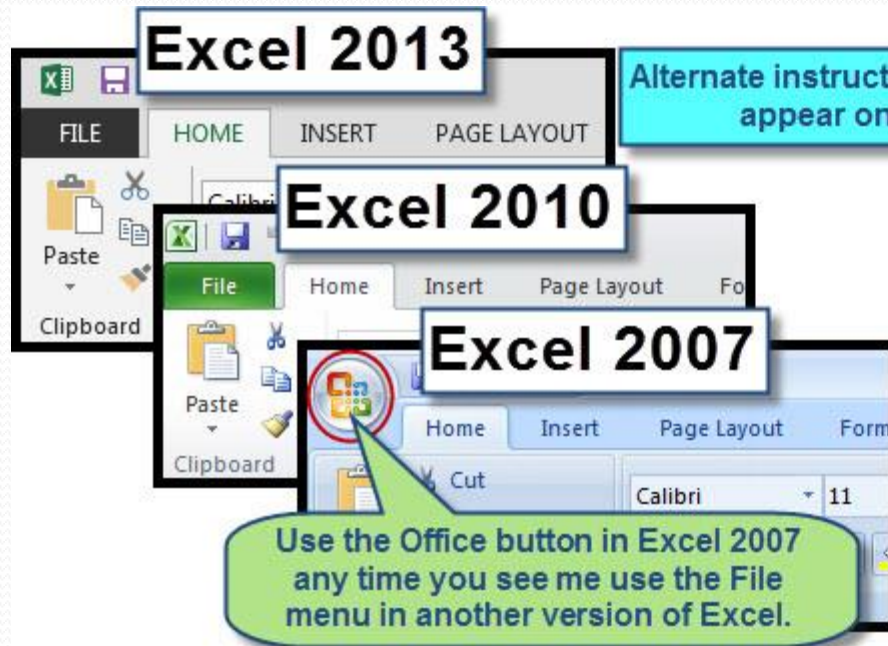
Ideal Data for Pivot Tables

- Each column must have a title.
- Titles need to be in a single cell.
- Reword titles if necessary so that you can remember what data is in that field.
- Each title must be unique.

Make sure the data file is anything except XLS. Certain features will work differently or be disabled if your workbook is in the obsolete Excel 97-2003 workbook forrmat.

Blank cells are permissible in columns that contain text, but not in columns that are comprised of numbers.

No blank rows or columns, all cells with data must be contiguous.

Be sure to remove any total rows at the bottom of the list.

	A		C	D	E	F
1	Region	City	Vendor	Product	Cases Sold	Total Sales
2	North GA	Atlanta	Fruit R Us	Oranges	6168	61680
3	North GA	Atlanta	Fruit R Us	Apples	6079	85106
4	North GA	Atlanta	Fruit R Us	Kiwi	6058	
5	North GA	Atlanta	Fruit R Us	Bananas		
6	North GA	Atlanta	Fruit R Us	Mixed Berries		
7	North GA	Atlanta	Bob's Fruit	Oranges		
8	North GA	Atlanta	Bob's Fruit	Apples	1565	21910
9	North GA	Atlanta	Bob's Fruit	Kiwi	9967	99670
10	North GA	Atlanta	Bob's Fruit	Bananas	98	
11				Mixed Berries	89	
12				Oranges	4933	63
13				Apples	7704	07856
14	North GA	Atlanta	Fruitiu	Kiwi	5519	71747

Fruit Data

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Initiating a Pivot Table

Pivot Table Interfaces

When you click on your pivot table, these two menus appear on the ribbon.

This tab is labeled Analyze in Excel 2013.

This is the Pivot Table Field List from which you select and position the fields you want to see on the Pivot Table.

This is the blank pivot table area before any fields have been added.

Adding Fields to a Pivot Table

Adding Another Row Field

Adding Columns to Pivot Tables

XLS Files

When you create a Pivot Table using an .xls file, they look out dated.

Convert Excel 2003/XLS Workbooks

Number Formatting

Removing Fields from a Pivot Table

Text Within Data

Subtotal by Region

Show Subtotals at Bottom of Group

Expanding/Collapsing

Sorting Fields

Renaming Fields

Filter Columns

Drill Down

▲	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3	**Total Sales**	**Column Labels** ▼									
4	**Row Labels** ▼	**Apples**	**Bananas**	**Kiwi**	**Mixed Berries**	**Oranges**	**Grand Total**				
5	Bob's Fruit	21910	98420	99670	89930	93816	403746				
6	Fruit Direct	82030	107406	58800	51012	9604	308852				
7	Fruit R Us	85106	75548	66638	29940	61680	318912				
8	Fruitju	107856	126630	71747	11557	5420	372053				
9	Middle Georgia Fruit	15764	1473				17				
10	Mountain Fruit	83538	60900				06				
11	Navel Oranges & More	17772	23415				73				
12	Orange U Glad	31260	81521	43121	93405	72061	321368				
13	Oranges 'n Onions	61464	80145	11682	8350	52400	214041				
14	Whistlestop Fruit Stand	108147	87934	68500	81444	149745	495770				
15	**Grand Total**	**614847**	**756649**	**643277**	**518888**	**715977**	**3249638**				

1 You can double-click on any number within the Pivot Table.

▲	A	B	C	D	E	F
1	**Region** ▼	**City** ▼	**Vendor** ▼	**Product** ▼	**Cases Sold** ▼	**Total Sales** ▼
2	North GA	Clarkesville	Fruit Direct	Apples	8203	82030
3	North GA	Clarkesville	Fruit Direct	Bananas	8262	107406
4	North GA	Clarkesville	Fruit Direct	Kiwi	3920	58800
5					4251	51012
6					686	9604

2 You can now see a summary of the underlying numbers on a new worksheet.

Pivot Table Fruit

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Refresh Your Pivot Table

Report Filter Feature

Generate Multiple Pivot Tables

GetPivotData function

Pivot Table Calculations

Calculated Fields

Questions? Spreadsheet Consulting Help?

I'm happy to hear from you *(e-mail is best)*:

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