



# Excel PivotTables

## Five Quick Tips

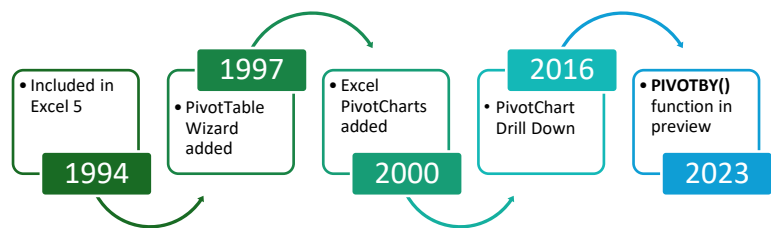
# Webinar Companion Handout

## Brief History of Excel PivotTables

Excel PivotTables are a quick way to summarize and manipulate (or pivot) numerical information in an easy to digest format.

In 1986, Pito Salas initially began work on a concept that eventually became Lotus Improv. PivotTables are built on the concepts introduced in that software package.

The functionality was further refined by many vendors until late 1993/early 1994, when Microsoft its version of PivotTables in Excel 5. They have progressively improved the feature in each subsequent version of Excel.<sup>1</sup>



Some highlights include:

- PivotCharts, added in Excel 2000.
- PivotChart Drill Down, was added in Excel 2016<sup>2</sup>
- PIVOTBY() function, in preview late 2023.<sup>3</sup>

The new Excel PIVOTBY() function allows you to create a simple pivot table with just four arguments.



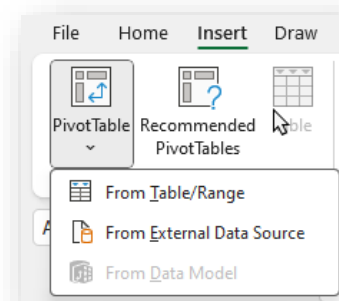
### Tip #1: Use the PivotTable Wizard

Before the late 2000s, the PivotTable Wizard was **the** way to create a new PivotTable. Now, we have several options.

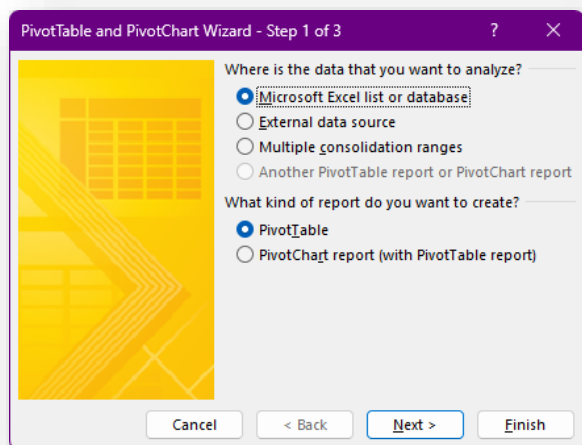
The easiest way to create a new PivotTable is to use the **Recommended PivotTables** option found in the **Tables** group of the **Insert** tab.

You can also create a New PivotTable by following these steps:

1. Go to the **Tables** group of **Insert** tab.
2. Select **PivotTable** or select an option from the dropdown menu.
3. In the **PivotTable from table or range** dialog box, identify the correct Table/Range, then choose if you would like a new worksheet or to add the PivotTable.
4. Click **OK**.



If you also need a PivotChart, another option is to select **PivotChart** from the **Charts** group on the **Insert** tab. The **Create PivotChart** dialog box will appear with similar options as used for PivotTables. Make your selections and click **OK**. A blank PivotChart and PivotTable will be created in your designated location!



But the PivotTable Wizard is still there!

Use the keyboard shortcut **ALT+D** (pressed together) followed by **P** to summon the **PivotTable wizard**. You can also add a shortcut to your **Quick Access Toolbar** if you prefer to use your mouse.<sup>4</sup>

The PivotTable and PivotChart Wizard will appear.

Here you can create a new PivotTable or PivotChart report using the following sources:

- Microsoft Excel list or database
- External data source
- Multiple consolidation ranges
- Another PivotTable report or PivotChart report

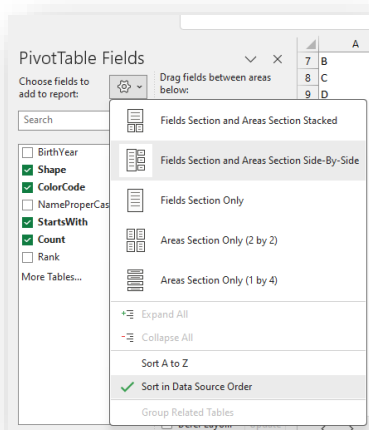
Follow the prompts to verify the data source and location for your new report.

## Tip #2: Change the Field Window

Although the default arrangement is **Field Section and Areas Section Stacked** with the pane located on the right of your screen, you have additional options for how to display the **PivotTable Field** task pane.



- Use the Gear symbol to chat how the **PivotTable Fields** Task Pane Appears.
- You can use the dropdown arrow near the close icon to **Move, Resize, or Close** the PivotTable Field Task Pane.



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### Tip #3: Add a Field Twice

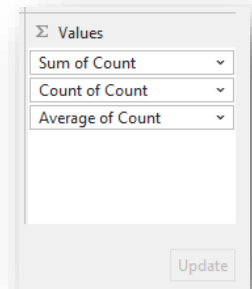
Did you know you can add an Excel PivotTable field not just twice but multiple times?

You can use this functionality when you would like to perform multiple calculations and display them all within your PivotTable report.

For example, you may want to summarize both the count and sum of a particular value. In our illustration, we also show the average as well. In addition to summarization options, you have many display options. You can choose to show your value as *Percentage*, *Running Total*, *Difference*, or *Rank* to name a few.

To add the field again:

1. Drag the selected item from the **Field section** to the **Area section** of the **PivotTable Fields** task pane.
2. Use the dropdown arrow on the right of the item button to display the **Value Field Settings** dialog box.
3. Choose the **Type of Calculation** you would like to use in the **Summarize Values By** tab or click the **Show Values As** to select an option from the **Show values as field**.
4. Click **OK**.



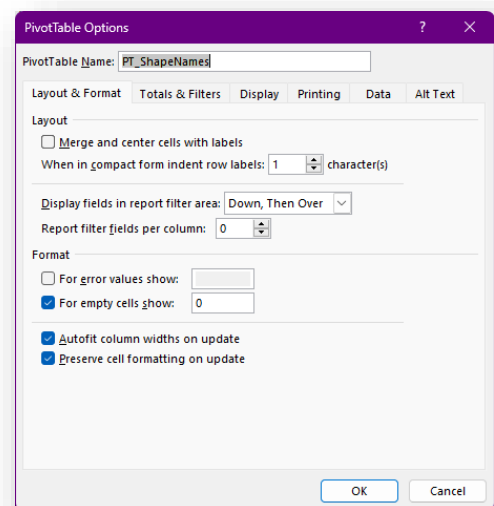
### Tip #4: Replace Blank Cells

Sometimes when we build a PivotTable, we have cross-sections with no values, so the PivotTable displays a blank space, but this is not your only option. You can update your PivotTable to show a value or symbol instead.

Here's how:

1. Right click anywhere within the PivotTable to see the contextual menu.
2. Select **PivotTable Options...**
3. In the **PivotTable Options** dialog box that appears, go to the **Format** section of the **Layout & Format** tab.
4. Ensure the checkbox before **For empty cells show** is selected.
5. Input the value you would like to use in the field to the right.
6. Click **OK**.

Your pivot table should now have values where previously there were blank cells.



[This article from Avantix Learning](#) provides five additional ways to remove blank cells from your PivotTable.

# Formatting Pivot Tables

In addition to removing blank cells, you have several options to make sure that your PivotTable is visually appealing.

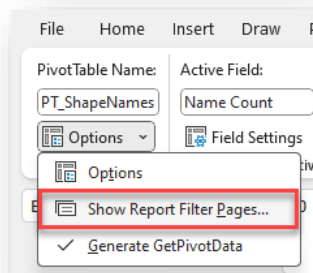
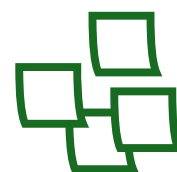
Here are some settings to explore:

- Remove **Gridlines** (**View** Tab -> **Show** Group -> Uncheck **Gridlines**)
- Add **Slicers** and **Timelines** (**PivotTable Analyze** Tab -> **Filter** Group)
- Toggle off **Field Headers** (**PivotTable Analyze** Tab -> **Show** Group)
- Change the Report Layout (**Design** Tab -> **Layout** Group)
- Modify or Create a Style (**Design** Tab -> **PivotTable Styles** Group -> Expand -> **New PivotTable Style...**)

Also, don't forget to give your PivotTable and the tab where it resides meaningful names instead of only using the names automatically generated by Excel. This will help you and anyone else who is using the file to understand the data more easily.

## Tip #5: Show Report Filter Pages

If we are using the filter area of our PivotTable, Excel can automatically create new pages for us. This functionality will prevent us from manually creating new pages for each of our filter items.



To create report filter pages, follow these steps:

1. Go to the **PivotTable** group of the **PivotTable Analyze** tab.
2. Select **Options** dropdown.
3. Select **Show Report Filter Pages....**
4. In the **Show all report filter pages** dialog box that appears, choose the field you would like to expand and click **OK**.

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## Additional References

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<sup>1</sup> [https://en.wikipedia.org/wiki/Pivot\\_table#History](https://en.wikipedia.org/wiki/Pivot_table#History)

<sup>2</sup> [Excel Pivot Chart Drill Down Buttons](#)

<sup>3</sup> [PIVOTBY function](#)

<sup>4</sup> [Customize the Quick Access Toolbar](#)