

LOGICAL FORMULAS AND CONDITIONAL FORMATTING

Agenda

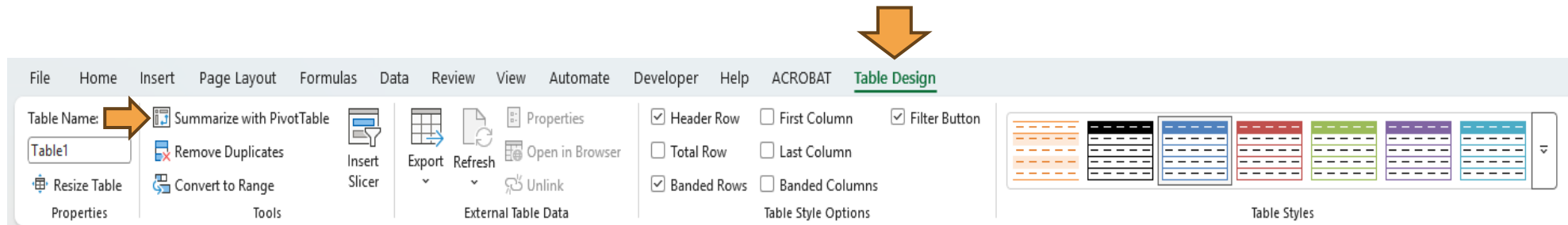
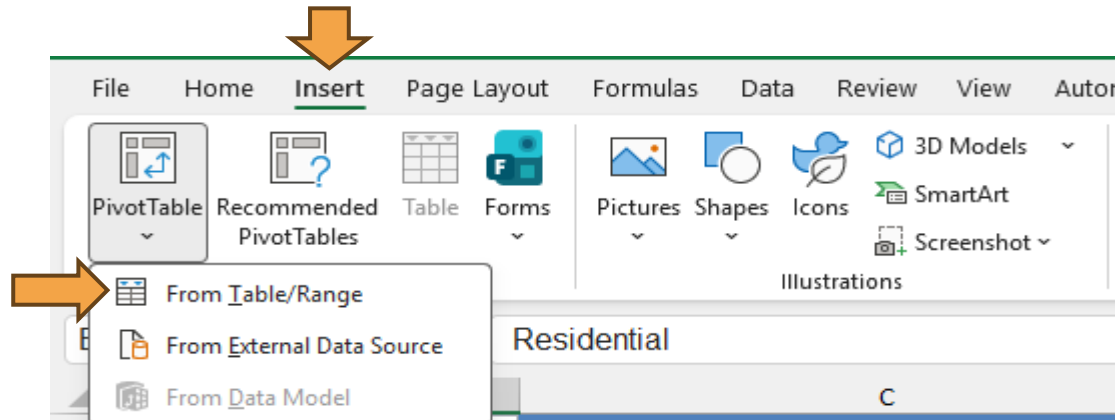
Pivot Tables – Creating

Pivot Tables – Tool Bars

Pivot Charts

Pivot Tables - Creating

- Two ways to create



Pivot Tables – Creating

- Table/Range can be a range of cells or just refer to an Excel Table by name

PivotTable from table or range ? X

Select a table or range

Table/Range: ↕

Choose where you want the PivotTable to be placed

☒ New Worksheet

☐ Existing Worksheet

Location: ↕

Choose whether you want to analyze multiple tables

☐ Add this data to the Data Model

OK Cancel

PivotTable from table or range ? X

Select a table or range

Table/Range: ↕

Choose where you want the PivotTable to be placed

☒ New Worksheet

☐ Existing Worksheet

Location: ↕

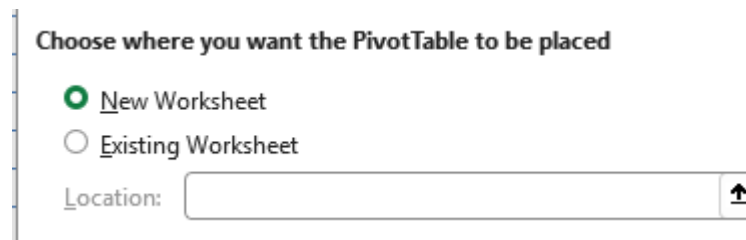
Choose whether you want to analyze multiple tables

☐ Add this data to the Data Model

OK Cancel

Pivot Tables – Creating

- You can choose to place the pivot table in a new worksheet (most often) or in an existing worksheet.
- This choice can be changed as pivot tables can be moved or copied later.
- If you choose Existing Worksheet, you must also specify a location.



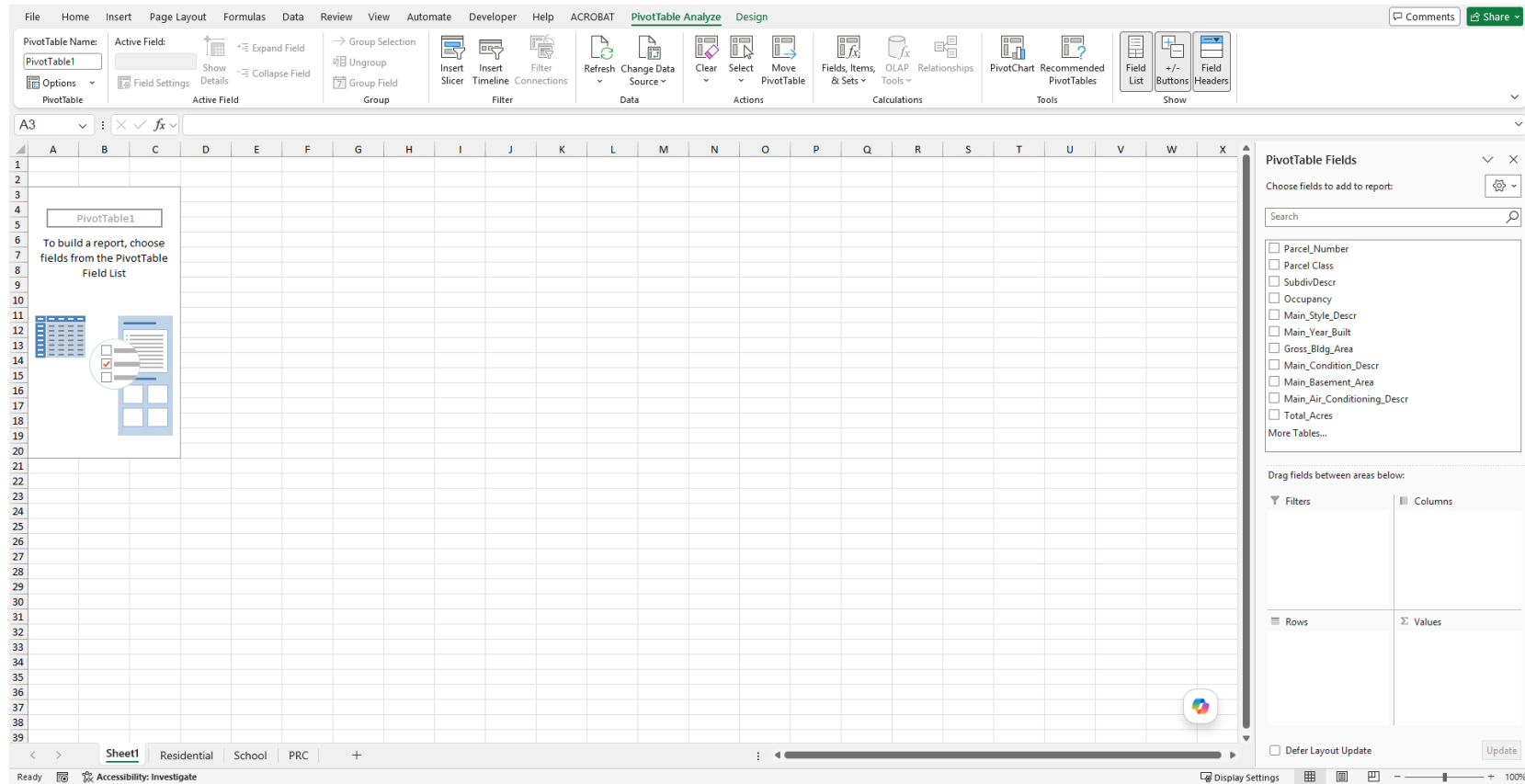
Choose where you want the PivotTable to be placed

☒ New Worksheet

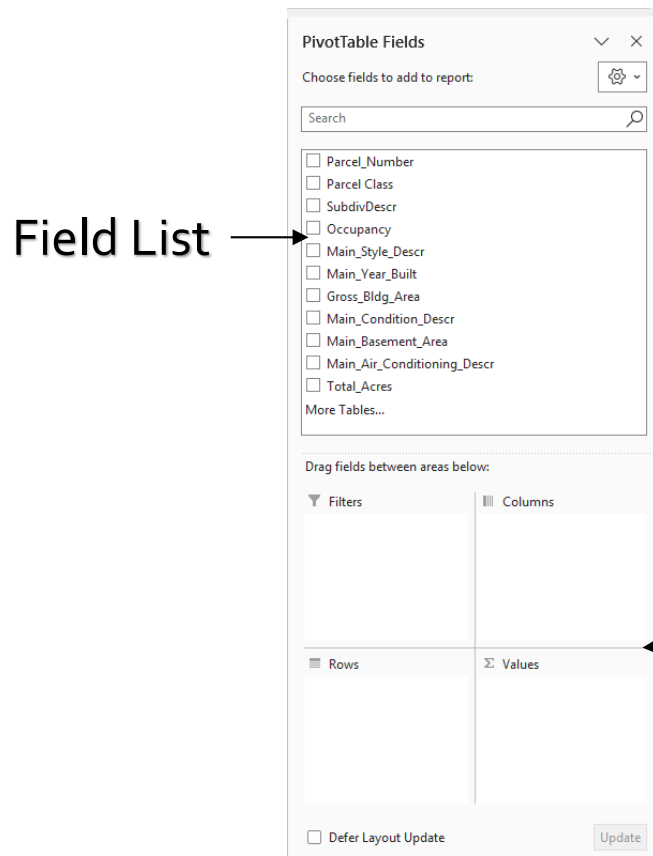
☐ Existing Worksheet

Location: 

Pivot Tables - Creating



Pivot Tables - Creating



Four Field Areas (Filters, Columns, Rows, Values) →

Rows create the primary categories displayed down the left side of the PivotTable, while **Columns** create headings across the top for side-by-side comparisons. **Values** contain the data being calculated, such as sums, counts, averages, or other summary statistics. **Filters** allow you to limit the data shown in the PivotTable to focus on specific records or categories.

Pivot Tables - Creating

The screenshot displays the Microsoft Excel interface with a PivotTable and the PivotTable Fields task pane.

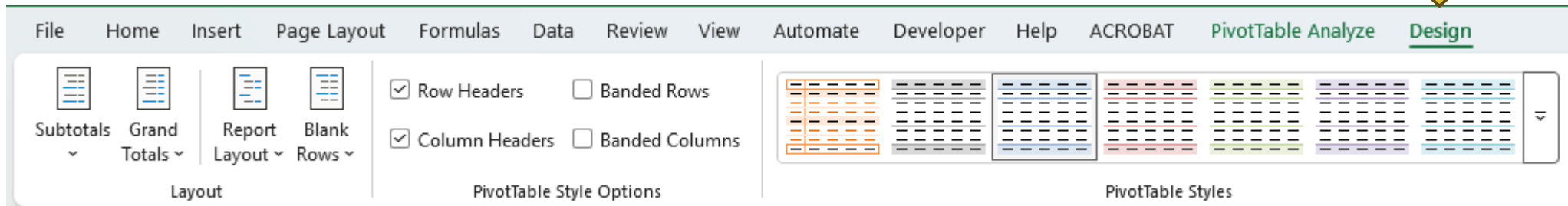
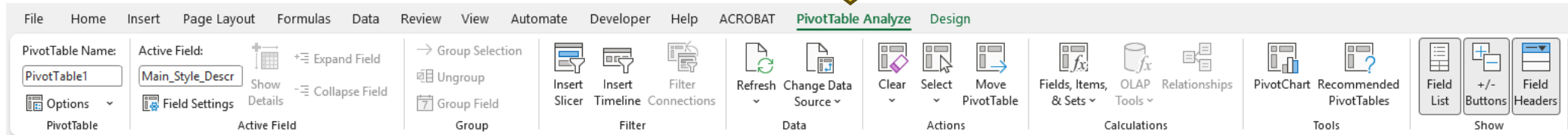
PivotTable Fields Task Pane:

- Choose fields to add to report:** Search box, list of fields with checkboxes: ☒ Parcel_Number, ☐ Parcel Class, ☐ Subdiv_Descr, ☐ Occupancy, ☒ Main_Style_Descr, ☐ Main_Year_Built, ☒ Gross_Bldg_Area, ☐ Main_Condition_Descr, ☐ Main_Basement_Area, ☒ Main_Air_Conditioning_Descr, ☐ Total_Acres. More Tables... button.
- Drag fields between areas below:**
 - Filters:** Main_Style_Descr
 - Columns:** Main_Air_Conditioning_Descr
 - Rows:** Parcel_Number
 - Values:** Sum of Gross_Bldg_Area
- ☐ Defer Layout Update. Update button.

PivotTable Data:

Row Labels	Ductless	No	Yes	Grand Total
01-0021200			1272	1272
04-0106000			1792	1792
05-0134500			2683	2683
05-0135050			1776	1776
05-0136085			1056	1056
05-0136150		980		980
05-0136160		736		736
05-0136170			1392	1392
05-0136200			1320	1320
05-0136220		812		812
05-0136250		854		854
06-0001500			5088	5088
07-0004050			1568	1568
07-0011000			1760	1760
07-0013000			2946	2946
07-0015300		1225		1225
07-0021000		1476		1476
08-0106000			1935	1935
08-0106525			1260	1260
08-0161000			1278	1278
08-0162000			1920	1920
08-0163000			1220	1220
08-0164000			960	960
08-0165000			1400	1400
08-0166000			1152	1152
08-0167000			938	938
08-0179000			1168	1168
08-0184000			1744	1744
08-0186000			1080	1080
08-0190000			1008	1008
08-0191000			1955	1955
08-0192000			952	952
08-0193000			1568	1568
08-0217920			2424	2424
08-0217980			1178	1178

Pivot Tables – Tool Bars



Pivot Tables – PivotTable Analyze

- Pivot Table Name (no spaces or special characters)
- Pivot Table Options (more on this soon)
- Active Field

PivotTable Name:

PivotTable1

Options ▾

Active Field:

Field Settings



Drill
Down



Drill
Up ▾

+ Expand Field

- Collapse Field

- Grouping

→ Group Selection

Ungroup

Group Field

- Slicers



Insert
Slicer



Insert
Timeline

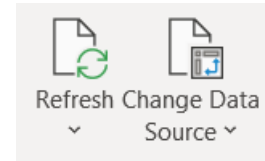


Filter
Connections

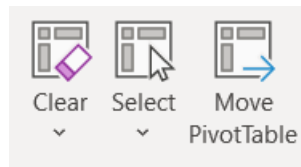
Filter

Pivot Tables – PivotTable Analyze

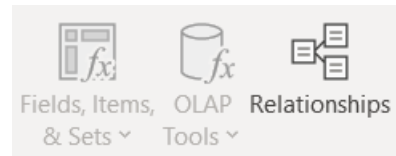
- Refresh the Pivot Table or change data source



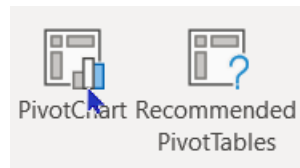
- Pivot Table Actions



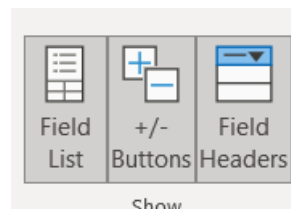
- Calculations



- Pivot Charts

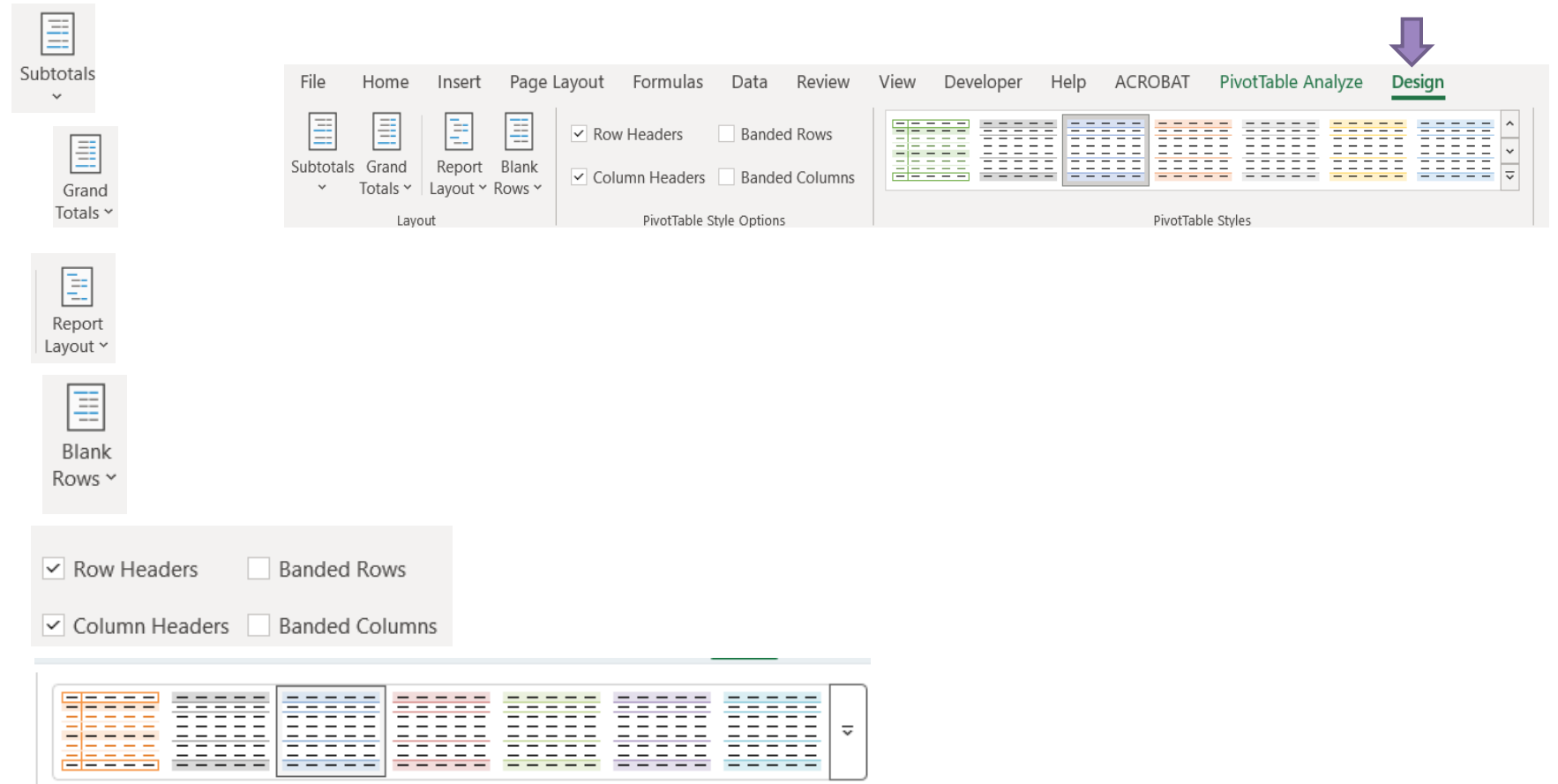


- Show Hide Toggles



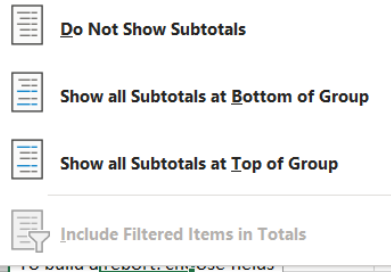
Pivot Tables – Design

- Turn Subtotals on or off
- Turn Grand Totals on or off
- Change Pivot Table Layout
- How to handle blank rows
- Pivot Table Styles on/off
- Change Colors of Pivot Table

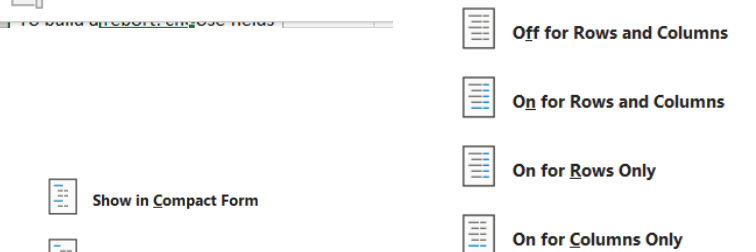


Pivot Tables – Design

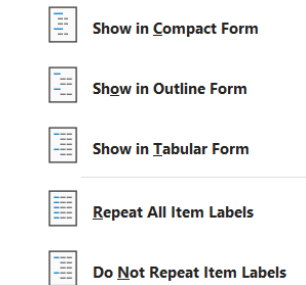
- Subtotals



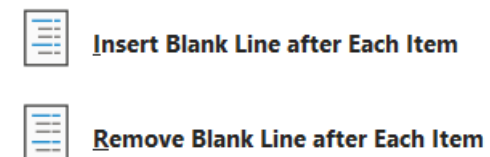
- Grand Totals



- Report Layout



- Blank Rows



Pivot Tables - Calculations

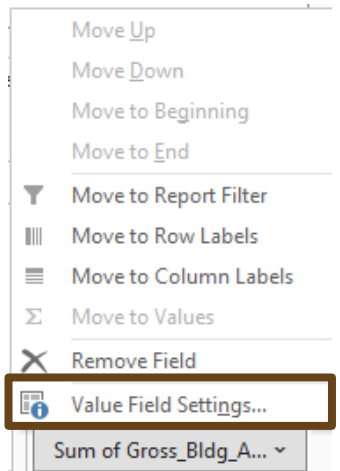
- Two Ways to change the calculation

Right Click
on any
number

The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable is named 'Main_Style_Descr' and is located in the range A1:O10. The data source is 'Main_Style_Descr'. The PivotTable shows the 'Sum of Gross_Bldg_Area' for various 'Main_Style_Descr' values. The PivotTable Fields task pane is open on the right, showing the list of fields and the current layout. A right-click context menu is visible over the PivotTable, with the 'Value Field Settings...' option highlighted.

Row Labels	Sum of Gross_Bldg_Area
01-0021200	1272
04-0106000	1792
05-0134500	2683
05-0135050	1776
05-0136085	1056
05-0136150	980
05-0136160	736
05-0136170	1392
05-0136200	1320
05-0136220	812
05-0136250	854
06-0001500	5088
07-0004050	1568
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07-0013000	2946
07-0015300	1225
07-0021000	1476
08-0106525	1935
08-0106525	1260
08-0161000	1278
08-0162000	1920
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08-0167000	938
08-0179000	1168
08-0184000	1744
08-0186000	1080
08-0190000	1008
08-0191000	1955
08-0192000	952
08-0193000	1568
08-0217920	2424
08-0217980	1178

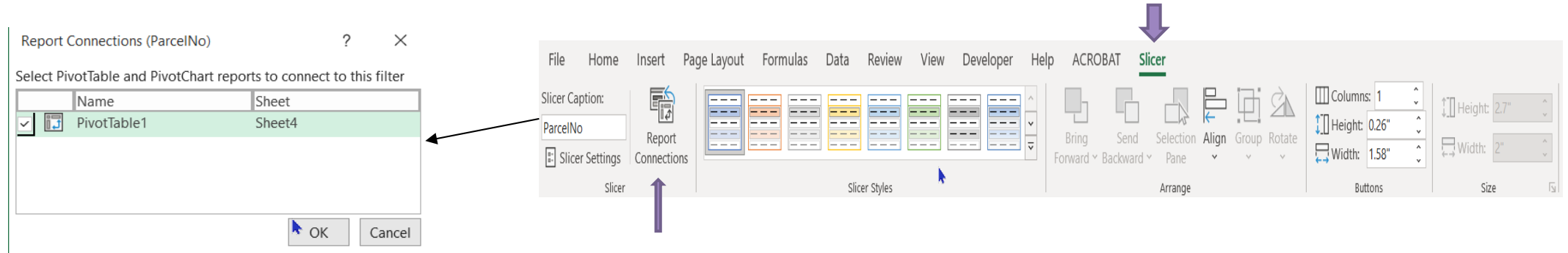
Or click the
arrow on the
Values Field and
choose "Value
Field Settings..."



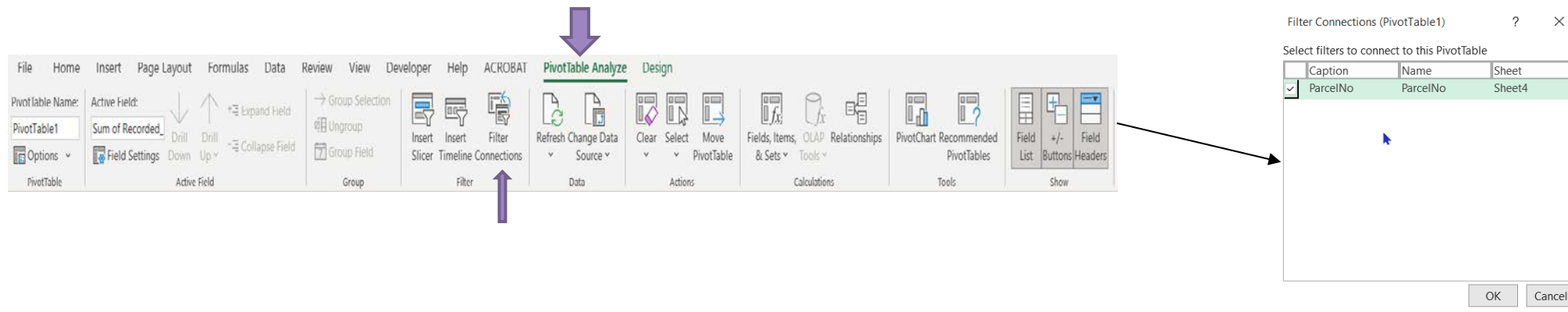
Pivot tables - Calculations



Pivot Tables Slicers - Connections



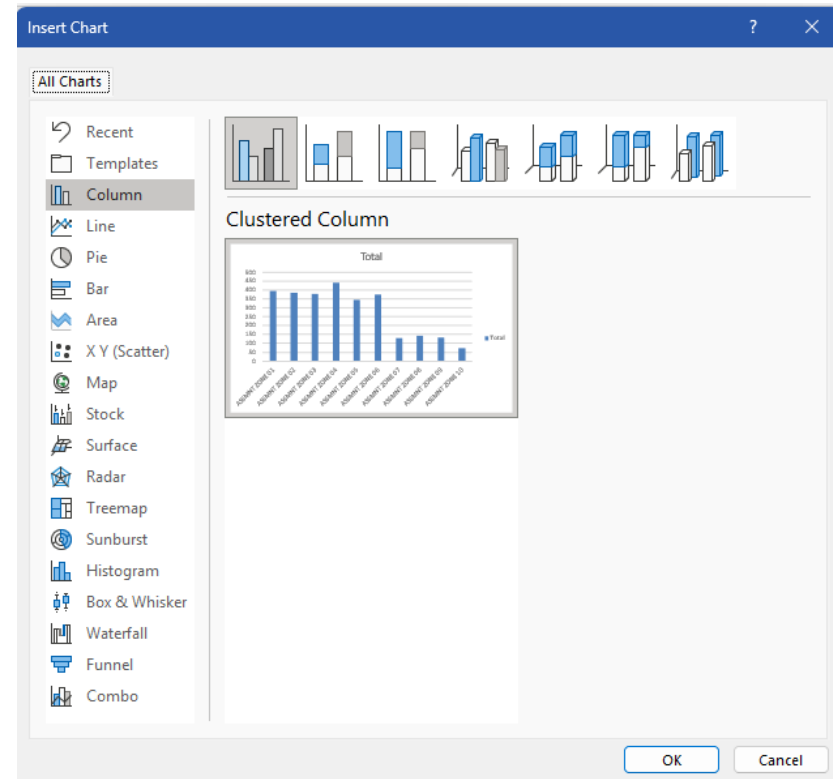
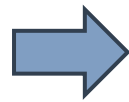
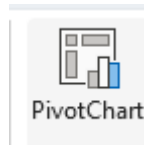
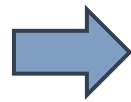
- Two ways: Slicer to Pivot Table (above) or Pivot Table to Slicer (Below)



Pivot Charts

- Start by creating a pivot table then click the PivotChart button

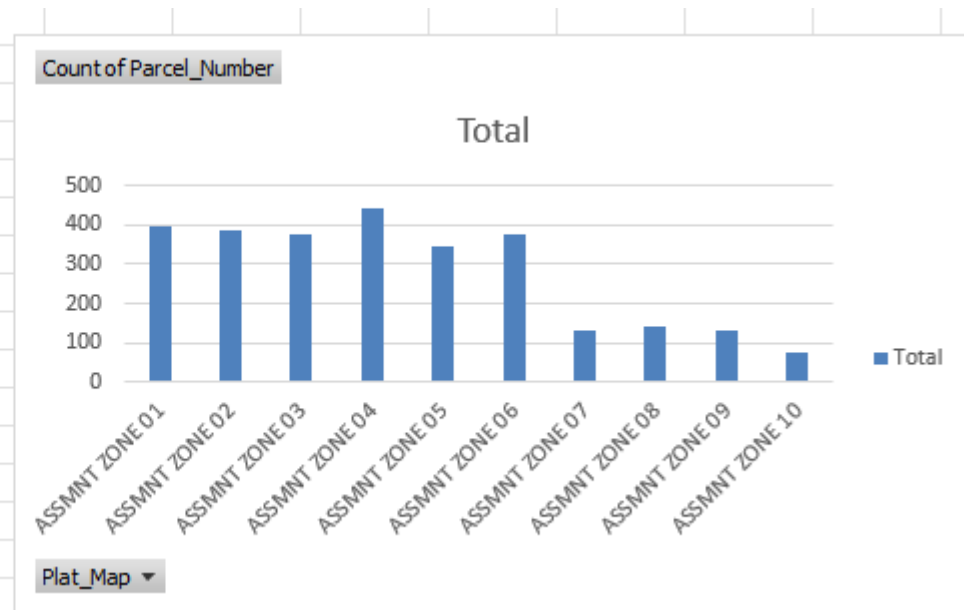
Row Labels	Count of Parcel_Number
ASSMNT ZONE 01	396
ASSMNT ZONE 02	386
ASSMNT ZONE 03	379
ASSMNT ZONE 04	441
ASSMNT ZONE 05	345
ASSMNT ZONE 06	375
ASSMNT ZONE 07	129
ASSMNT ZONE 08	142
ASSMNT ZONE 09	134
ASSMNT ZONE 10	73
Grand Total	2800



Pivot Charts

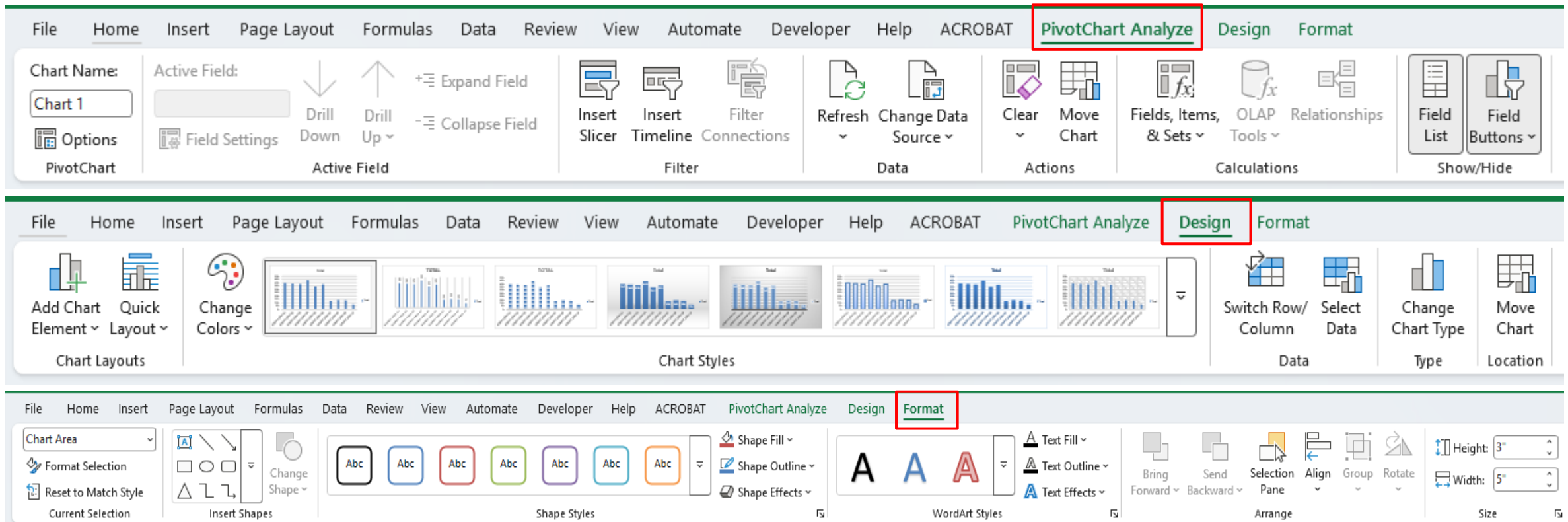
- Charts are a floating object that exists above the spreadsheet rather than in any specific cell or cells.

2		
3	Row Labels	Count of Parcel_Number
4	ASSMNT ZONE 01	396
5	ASSMNT ZONE 02	386
6	ASSMNT ZONE 03	379
7	ASSMNT ZONE 04	441
8	ASSMNT ZONE 05	345
9	ASSMNT ZONE 06	375
10	ASSMNT ZONE 07	129
11	ASSMNT ZONE 08	142
12	ASSMNT ZONE 09	134
13	ASSMNT ZONE 10	73
14	Grand Total	2800
15		
16		
17		



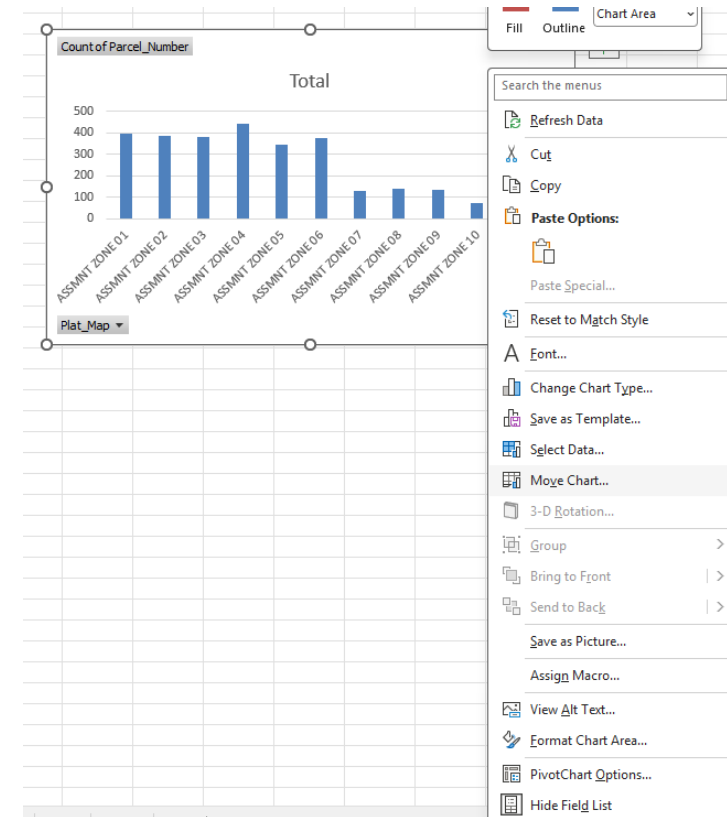
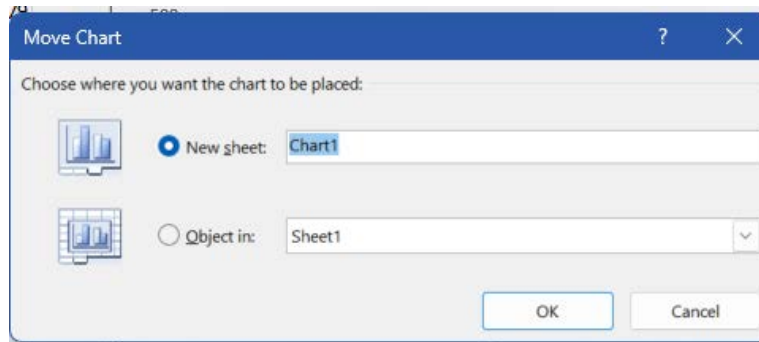
Pivot Charts

- Three menus for PivotCharts



Pivot Charts

- You can move the chart to a special tab for charts
 - Select the chart so the grab handles appear
 - Right click anywhere and select “Move Chart”
 - Now select “New sheet”



Pivot Charts

- The PivotTable and PivotChart are linked, so changes made to one are reflected in the other. Because some settings that work well for a PivotChart may not be ideal for displaying data in a PivotTable, it is often a good idea to create a separate PivotTable specifically for the chart while using another PivotTable to display the data.
- PivotTables and PivotCharts do not have to be on the same worksheet. You can move either the PivotTable or the PivotChart to a different worksheet at any time.

Data Dashboards

- You can combine simple pivot tables and pivot charts each showing one piece of information into a single sheet and then link them all to slicers to create a dashboard to analyze your data.

Contact Information

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