CHAPTER 1

Creating a Pivot Table

Even though you've likely created many PivotTable reports in Microsoft Excel, you sometimes encounter problems while setting them up. Perhaps the layout isn't as flexible as you'd like, or you have trouble connecting to the data source that you want to use. The PivotTable and PivotChart Wizard provides many options as you create the PivotTable report, and you want to understand the effect the different settings have. This chapter discusses the issues you can consider as you plan the PivotTable report, set up the source data, connect to the source, and select the PivotTable options.

1.1. Planning a Pivot Table: Getting Started

Problem

You've been asked to create a pivot table from your company's sales data, and you aren't sure what issues to consider before you create it.

Solution

If you spend some time planning, you can create a pivot table that is easier to maintain and that clearly delivers the information your customers need. When planning a pivot table, you should consider several things:

- What type of data is available as the source for the pivot table?
- Where is the source data stored?
- Will you need to share this information with others?

1.2. Planning a Pivot Table: Accessing the Source Data

Problem

You've been asked to create a pivot table from your company's sales data, and you need to determine what type of source data you'll use.

Solution

In the first step of the PivotTable and PivotChart Wizard, you select a data source for your pivot table from the list of four source types:

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

Many pivot tables are created from a single Excel list, usually in the same workbook as the pivot table. Others are created from multiple Excel lists, or another source, such as a database query, online analytical processing (OLAP) cube, or an existing pivot table in the same workbook.

To determine if the source data can be used in its current state, here are some things to consider.

Where Is the Raw Data Stored?

To create a meaningful pivot table, you need current, accurate data. Is the raw data in your workbook updated by you on a regular basis? Or is the raw data stored elsewhere?

If others are using the pivot table, and the data is not stored in the workbook, will they have access to the source data when they want to refresh the pivot table?

How Frequently Will the Raw Data Be Updated?

If the raw data will be updated frequently, you may want a routine that automatically refreshes the pivot table when the workbook is opened. If the data is stored outside of the workbook, how will you be notified that the data has changed and that you need to refresh the pivot table?

What Problems Might You, or Other Users, Have in Accessing the Raw Data?

Does every user have access to the source data? Should there be a routine to refresh the pivot table on a regular basis?

If the source data is password protected, will all users know the password?

1.3. Planning a Pivot Table: Source Data Fields

Problem

You've been asked to create a pivot table from your company's sales data, and you need to know if the source data has all the fields you need to create your report.

Solution

The source data may contain all the fields that you want in the pivot table. However, you may need to report on other fields. For example, if variance from plan to budget is required in the pivot table, is variance a field in the source data? If not, you'll need some way to calculate that in the pivot table, or add it to the fields in the source data.

If fields are missing from the source data, can they be calculated at the source, or will they be calculated in the pivot table? What is the effect of either option?

1.4. Planning a Shared Pivot Table

Problem

You've been asked to create a pivot table from your company's sales data, and make the results available to other employees.

Solution

If a pivot table will be shared with others, here are some things to consider.

Will All Users Need the Same Level of Detail?

Some users may require a top-level summary of the data. For example, the senior executives may want to see a total per region for annual sales. Other users may require greater detail. The regional directors may want to see the data totaled by district, or by sales representative. Sales representatives may need the data totaled by customer, or by product number.