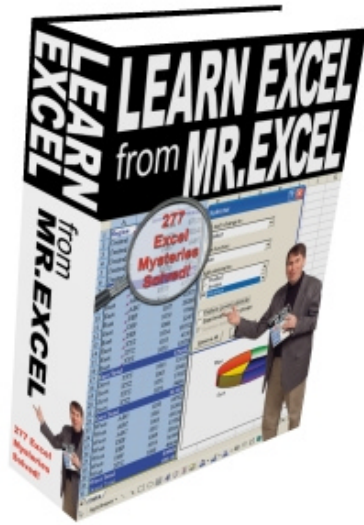




Free Preview – Week #20
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This week: Six more tips on Pivot Tables
Sort customers by revenue
Show just top 20 customers
Using PageFields for Criteria
Using PageFields for Ad-Hoc
Using a Pivot Table to get a unique list
Faster Pivot Table Creation

PRESENT A PIVOT TABLE IN HIGH-TO-LOW ORDER BY REVENUE

Problem: A Pivot Table organizes data alphabetically by default, as shown in Fig. 892. You want to produce a report sorted high-to-low by Revenue.

	A	B	C	D	E
1	Drop Page Fields Here				
2					
3	Sum of Revenue	Region			
4	Customer	Central	East	West	Grand Total
5	Ainsworth	223540	232076	113235	568851
6	Air Canada	4948	2358	23715	31021
7	Bell Canada	4060	14004	33176	51240
8	Chevron	20610	8116	25322	54048
9	Compaq	9064	4380	25806	39250
10	Compton Petroleum	11220	2029	18120	31369

Fig. 892

**Part
III**

Strategy: Each pivot field offers a sort option. To access the Sort options for the pivot field, follow these steps.

- 1) As shown in Fig. 893, double-click the Customer field in the pivot table.
- 2) This brings up the PivotTable Field dialog. Choose the Advanced button on the right side, as shown in Fig. 894.

2				
3	Sum of Revenue	Region		
4	Customer	Central	East	
5	Ainsworth	223540		
6	Air Canada	4948		

Fig. 893

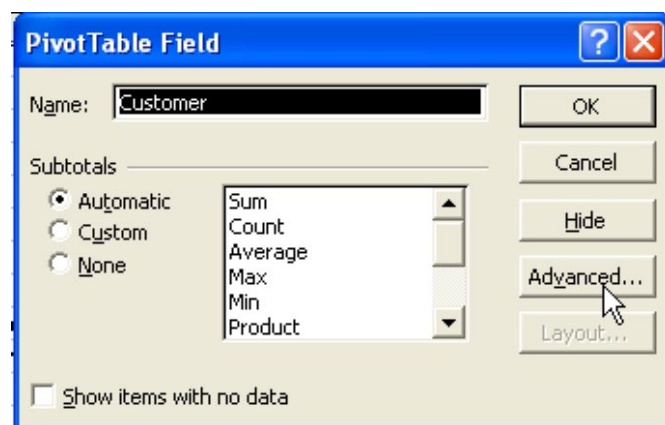


Fig. 894

- 3) As shown the PivotTable Field Advanced Options dialog in Fig. 895, you can see that the default sort is Manual. This option lets you resequence items by dragging or retyping. In the current example, you want to choose Descending.

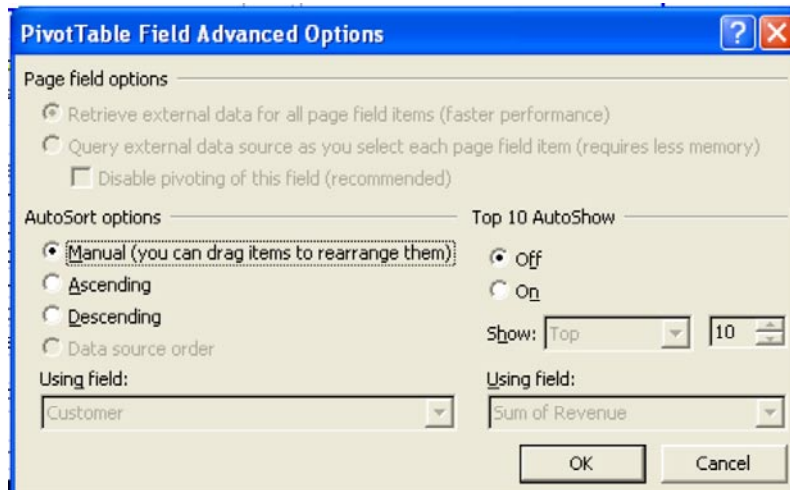


Fig. 895

- 4) Use the dropdown in the Using Field: area to choose to order by Sum of Revenue, as shown in Fig. 896.

Result: The report is sequenced with the largest customers at the top, as shown in Fig. 897.

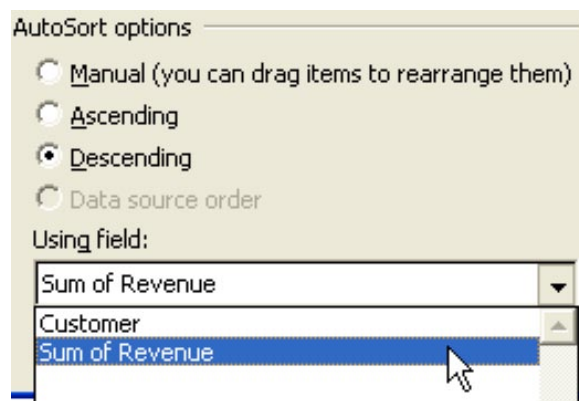


Fig. 896

3	Sum of Revenue	Region ▼			
4	Customer ▼	Central	East	West	Grand Total
5	Wal-Mart	327958	313454	228042	869454
6	General Motors	304323	260163	195967	760453
7	Exxon	315631	229640	159088	704359
8	Ford	288393	175967	158434	622794
9	Molson, Inc	209326	245081	159107	613514
10	Ainsworth	223540	232076	113235	568851
11	Sun Life Financial	151310	199982	147645	498937
12	IBM	457027	465770	400042	1323140

Fig. 897

Summary: The AutoSort options are fairly well hidden, but offer a variety of sorting options for each field in a pivot table.

Commands Discussed: Data – PivotTable – AutoSort

LIMIT A PIVOT REPORT TO SHOW JUST THE TOP 12 CUSTOMERS

Problem: Many times, a customer report will have hundreds of customers. If you are preparing a report for the senior vice president of sales, he may not care about the 400 customers who bought spare batteries this month. For most of the senior vice presidents of sales that I know, they like to see only the top 10 or 20 customers each month.

Strategy: There is a Top 10 AutoShow feature available in pivot tables. Follow these steps.

- 1) Double-click the Customer field in the pivot table. This brings up the PivotTable Field dialog. Choose the Advanced button, as shown in Fig. 898.

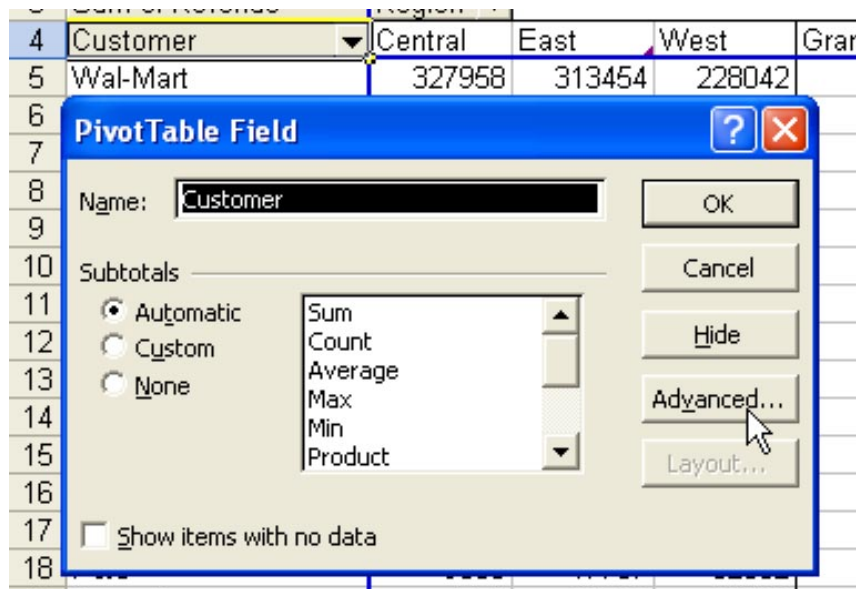
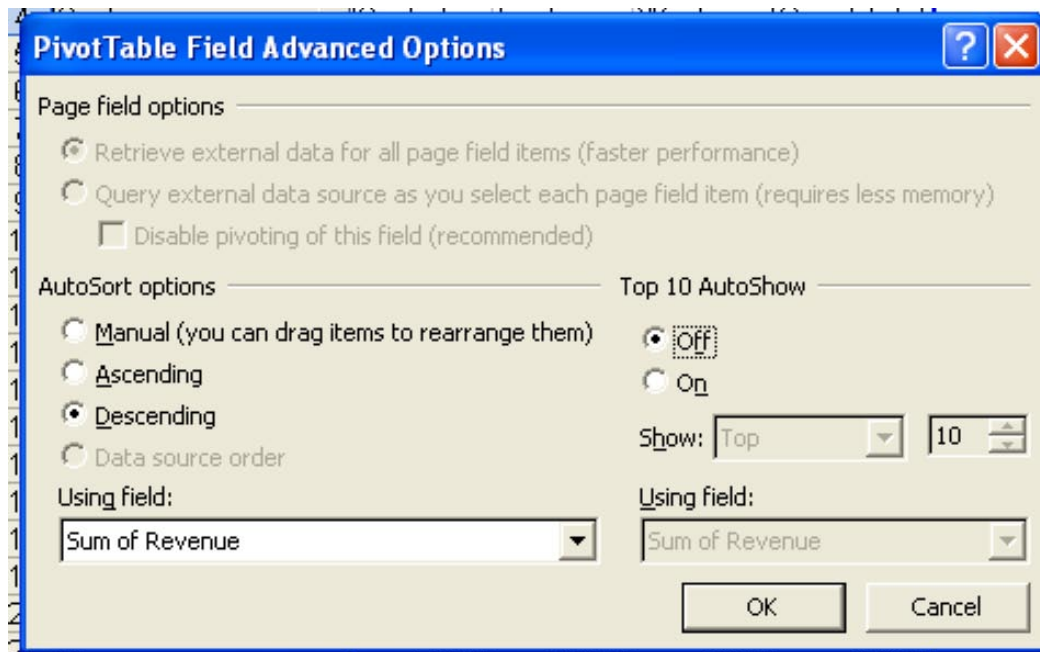
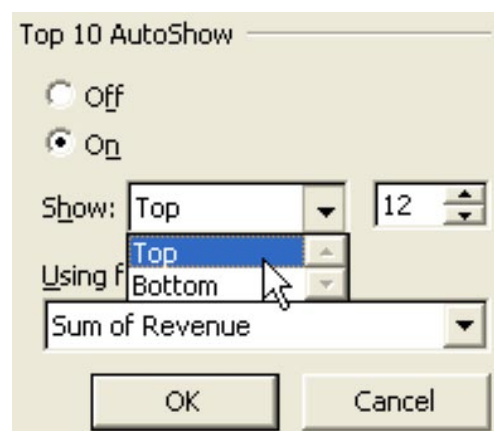


Fig. 898

- 2) This brings up the PivotTable Field Advanced Options. On the right side of this dialog is the Top 10 AutoShow, as shown in Fig. 899. By default, this feature is turned off for each field. Click to turn this option on.

*Fig. 899*

- 3) Although it is called the “Top 10” feature, it is far more flexible. You can show either the Top or Bottom customers. The spin button can be used to change 10 to any number. Select Top and 12, as shown in Fig. 900.

*Fig. 900*

- 4) Choose OK to close the Advance dialog. Choose OK to close the Field dialog.

Result: The report will be filtered to show just the top 12 customers, as shown in Fig. 901.

3	Sum of Revenue	Region ▼			
4	Customer ▼	Central	East	West	Grand Total
5	Wal-Mart	327958	313454	228042	869454
6	General Motors	304323	260163	195967	760453
7	Exxon	315631	229640	159088	704359
8	Ford	288393	175967	158434	622794
9	Molson, Inc	209326	245081	159107	613514
10	Ainsworth	223540	232076	113235	568851
11	Sun Life Financial	151310	199982	147645	498937
12	IBM	157637	165770	103942	427349
13	Nortel Networks	109320	203890	77891	391101
14	Verizon	100748	184563	105667	390978
15	SBC Communications	22140	38860	11680	72680
16	Shell Canada	20950	26571	24130	71651
17	Grand Total	2231276	2276017	1484828	5992121

Fig. 901

Additional Information: It is not obvious from this book, but the customer heading is in a blue font to indicate that the customer list has been filtered.

Gotcha: If there is a tie for twelfth place, the list may contain 13 customers. I have seen situations where the pivot table is limited to one obscure product that was only purchased by a few customers. This can create a huge multi-way tie at \$0 for twelfth place, resulting in hundreds of customers in the report.

Summary: The AutoShow option allows you to dynamically limit a report to the top five or bottom 12 items in a report.

Commands Discussed: Data – PivotTable – AutoShow

QUICKLY PRODUCE REPORTS FOR EACH REGION

Problem: You need to send a customer report to each regional manager in your company, as shown in Fig. 902. You want each manager to see sales only in his region.

	A	B	C	D	E
1	Drop Page Fields Here				
2					
3	Sum of Revenue	Product ▼			
4	Customer ▼	ABC	DEF	XYZ	Grand Total
5	Air Canada	5859	2358	22804	31021
6	Compton Petroleum	4158	13249	13962	31369
7	Texaco	7136	4270	22958	34364
8	Sears	8940	4282	21488	34710

Fig. 902

Strategy: The Page Field area of the pivot table can enable such a report. Drag the Region field from the PivotTable Field List and drop it above the pivot table, in the area called Drop Page Fields Here, as shown in Fig. 903.

	A	B	C	D	E
1	Drop Page Fields Here				
2					
3	Sum of Revenue	Product ▼			
4	Customer ▼	ABC	DEF	XYZ	Grand

Fig. 903

At first glance, nothing has really changed. All of the numbers in the pivot table are the same, as shown in Fig. 904.

	A	B	C	D	E
1	Region	(All) ▼			
2					
3	Sum of Revenue	Product ▼			
4	Customer ▼	ABC	DEF	XYZ	Grand Total
5	Air Canada	5859	2358	22804	31021
6	Compton Petroleum	4158	13249	13962	31369
7	Texaco	7136	4270	22958	34364
8	Sears	8940	4282	21488	34710
9	Compaq	17250	4380	17620	39250

Fig. 904

However, if you use the dropdown next to Region to select the East region, the report will update to show just the customers from the East region, as shown in Fig. 905. Print this report and send it to the East regional manager.

**Part
III**

	A	B	C	D	E
1	Region	East ▼			
2					
3	Sum of Revenue	Product ▼			
4	Customer ▼	ABC	DEF	XYZ	Grand Total
5	Ainsworth	61660	90978	79438	232076
6	Air Canada	0	2358	0	2358
7	Bell Canada	0	14004	0	14004
8	Chevron	8116	0	0	8116
9	Compaq	0	4380	0	4380

Fig. 905

To produce the report for Central, simply change the Region dropdown from East to Central. Repeat for each region.

Summary: Using Page Fields allows you to quickly filter a report to one choice from a given field.

Commands Discussed: Pivot Table – Page Fields

CREATE AN AD-HOC REPORTING TOOL

Problem: You have an operations manager who is famous for asking many ad-hoc questions. One day, he will want to know who bought XYZ product. The next day, he will want to know all sales to Air Canada.

Strategy: Build a pivot table report with many fields in the Page Field area, as shown in Fig. 906. The manager can use this to answer just about any ad-hoc query that he can dream up.

	A	B	
1	Region	(All) ▼	
2	Product	(All) ▼	
3	Customer	(All) ▼	
4	Date	(All) ▼	
5			
6	Data ▼	Total	
7	Sum of Revenue	6702877	
8	Sum of Quantity	313800	
9	Sum of COGS	2976322	
10	Sum of Profit	3726555	
11			

Fig. 906

The operations manager can easily figure out how many ABC products were shipped to the East Region on a given date, as shown in Fig. 907.

Summary: Using many Page Fields allows you to quickly filter a report to answer ad-hoc queries.

Commands Discussed: Pivot Table – Page Fields

	A	B	
1	Region	East ▼	
2	Product	ABC ▼	
3	Customer	(All) ▼	
4	Date	2-Jan-04 ▼	
5			
6	Data ▼	Total	
7	Sum of Revenue	10245	
8	Sum of Quantity	500	
9	Sum of COGS	4235	
10	Sum of Profit	6010	
11			

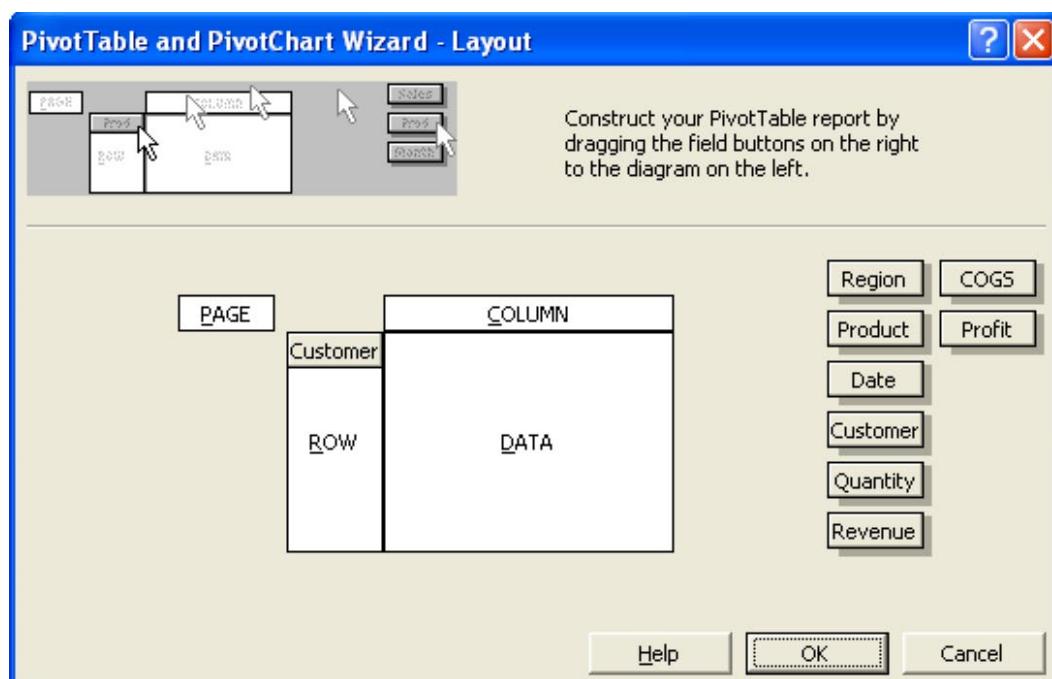
Fig. 907

CREATE A UNIQUE LIST OF CUSTOMERS WITH A PIVOT TABLE

Problem: You need to create a unique list of customers from a large list.

Strategy: Build a Pivot Table report with Customer in the Row area of the layout. Because the Pivot Table creates a summary report, the first column of the table will include the unique list of customers.

From the Data menu, select Pivot Table and Pivot Chart report. Choose Next in Step 1 and Step 2. In Step 3, choose Layout and drag the customer field to the Row area, as shown in Fig. 908.



**Part
III**

Fig. 908

You don't want a field in the Data area, but Excel will not let you out of the wizard without selecting something for the Data field. From the field list on the right, drag a second copy of the Customer field to the Data area, as shown in Fig. 909. This will give you a count of how many times each customer appears. While you don't need a count, remember you are just making Excel happy so it will give you the list of customers.

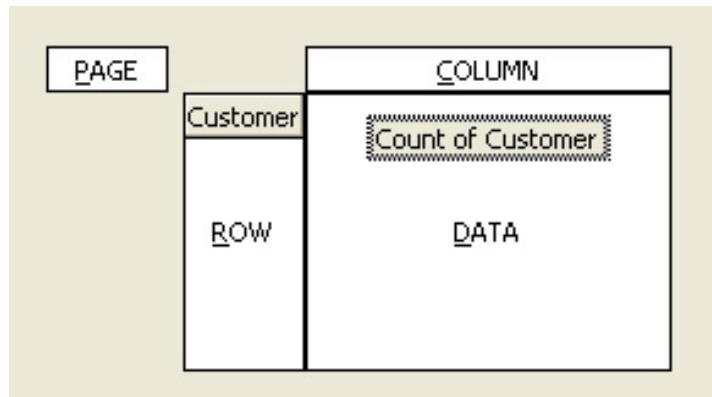


Fig. 909

You will get a unique list of customers in the first column of the pivot table. You can copy these and Paste – Special Values to a blank section of the worksheet, as shown in Fig. 910.

Summary: Of all the methods of getting a unique list of customers, this use of the pivot table is the fastest way to get the list.

Commands Discussed: PivotTable

	A	B
1		
2	Count of Customer	
3	Customer ▼	Total
4	Ainsworth	52
5	Air Canada	4
6	Bell Canada	4
7	Chevron	4
8	Compaq	4
9	Compton Petroleum	4
10	Exxon	66
11	Ford	56
12	General Motors	61
13	Gildan Activewear	4
14	HP	4
15	IRM	44

Fig. 910

CREATE A PIVOT TABLE WITH FEWER CLICKS

Problem: Even though pivot tables are the fastest way to summarize data, you are looking for an even faster way to create pivot tables.

Strategy: This method is only available in Excel 2000 and newer versions. Follow these steps.

- 1) Select a single cell in the original data, as shown in Fig. 911.

	A	B	C	D
1	Region	Product	Date	Customer
2	East	XYZ	1-Jan-04	Ford
3	Central	DEF	2-Jan-04	Verizon
4	East	ABC	2-Jan-04	Verizon

Fig. 911

- 2) From the menu, select Data – PivotTable. Click Finish, as shown in Fig. 912.

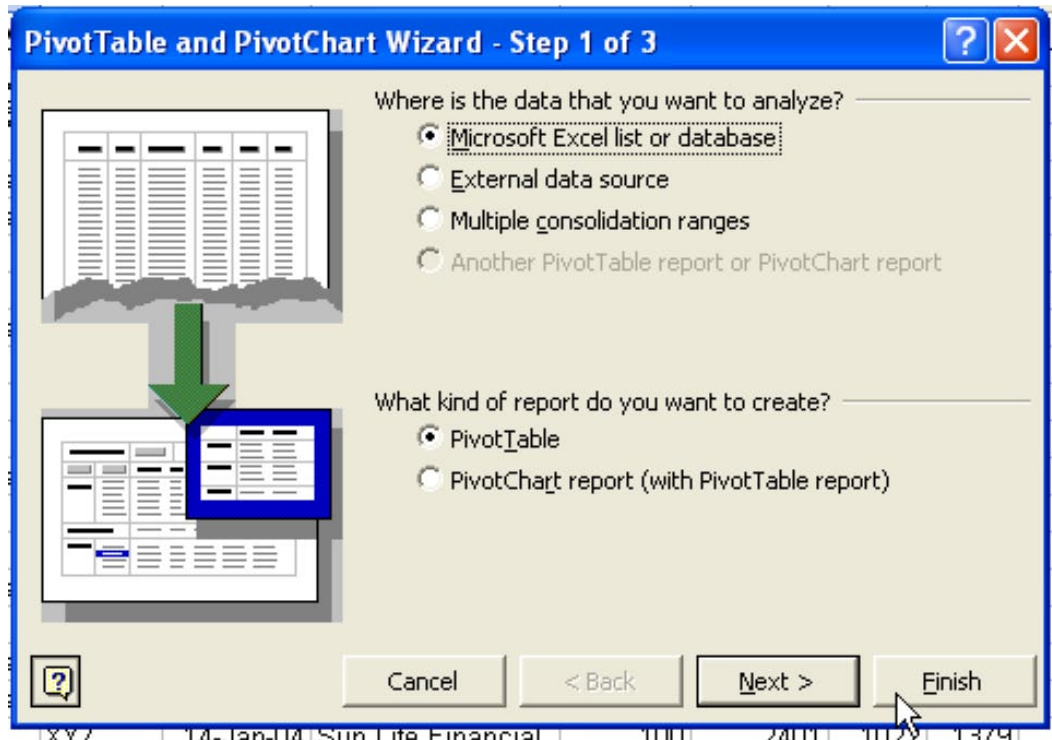


Fig. 912

You are given a blank pivot table on a new sheet, as shown in Fig. 913.

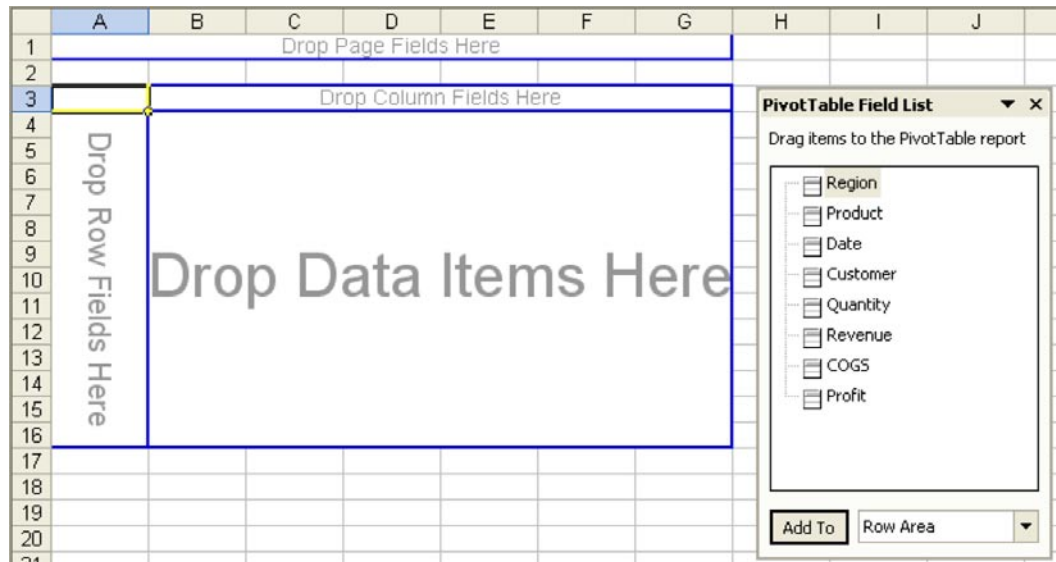


Fig. 913

- 3) Drag fields from the field list to the table, as shown in Fig. 914.

	A	B
1	Drop Page Fields Here	
2		
3	Sum of Revenue	
4	Region	Total
5	East	2477778
6	Central	2386169
7	West	1838930
8	Grand Total	6702877
9		

Fig. 914

Summary: This visual method for creating a pivot table is faster and more intuitive.

Commands Discussed: PivotTable