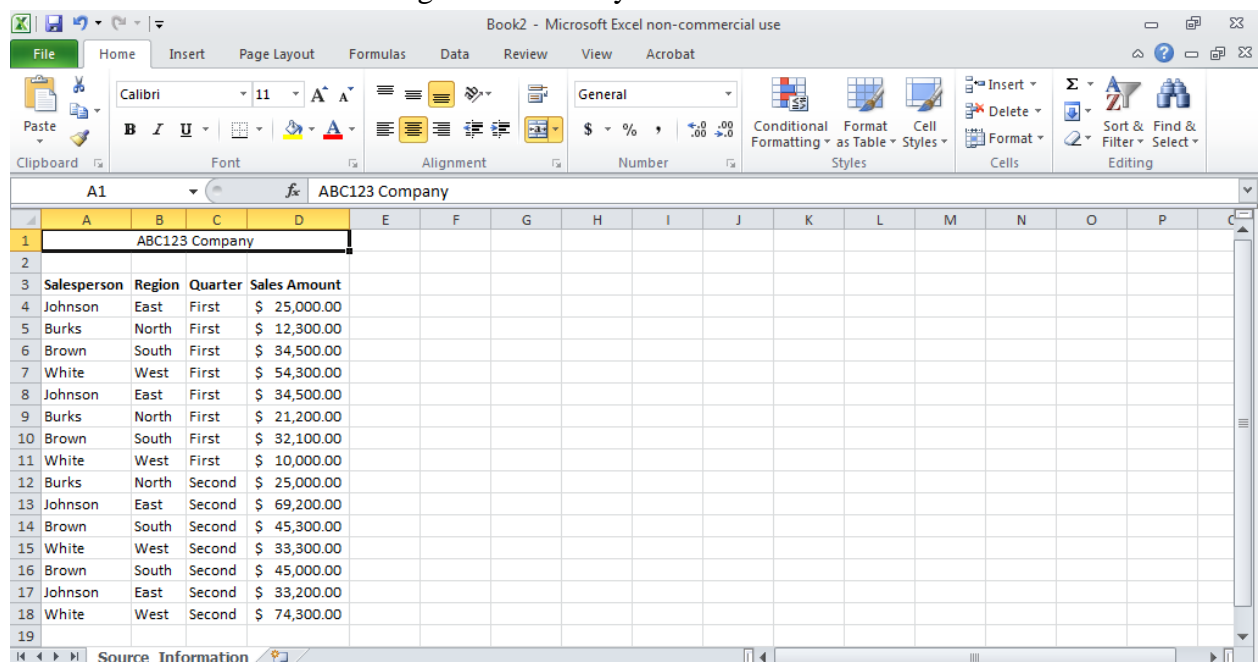


Pivot Tables/Charts (Microsoft Excel 2010)

You can use pivot tables whenever you want to summarize a large amount of data, such as customer lists, salesperson quarter/annual sales amounts, etc. Microsoft Excel 2010 allows you to quickly generate reports based on filtered information that is most useful to you. This tutorial will show you the basics of pivot table usage. The data used is based on a salesperson's first and second quarter sales for a business.

1. Start Microsoft Excel 2010.
2. Once a new blank worksheet opens, enter a company name in cell A1. (Example: ABC123 Company)
3. Beginning in cell A1, highlight the company name by holding down the left button of your mouse. Drag across to cell D1. Once highlighted, as indicated by a light blue fill color, press the Merge & Center button located in the Alignment group.
4. In cells **A1:D1**, enter the words **Salesperson**, **Region**, **Quarter**, and **Sales Amount**, respectively.
5. You can enter data as seen in Figure 1 or enter your own information.



The screenshot shows the Microsoft Excel 2010 interface. The worksheet is named 'Source_Information'. The data is organized as follows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	ABC123 Company															
2																
3	Salesperson	Region	Quarter	Sales Amount												
4	Johnson	East	First	\$ 25,000.00												
5	Burks	North	First	\$ 12,300.00												
6	Brown	South	First	\$ 34,500.00												
7	White	West	First	\$ 54,300.00												
8	Johnson	East	First	\$ 34,500.00												
9	Burks	North	First	\$ 21,200.00												
10	Brown	South	First	\$ 32,100.00												
11	White	West	First	\$ 10,000.00												
12	Burks	North	Second	\$ 25,000.00												
13	Johnson	East	Second	\$ 69,200.00												
14	Brown	South	Second	\$ 45,300.00												
15	White	West	Second	\$ 33,300.00												
16	Brown	South	Second	\$ 45,000.00												
17	Johnson	East	Second	\$ 33,200.00												
18	White	West	Second	\$ 74,300.00												
19																

Figure 1

6. Right click Sheet 1 at the bottom of your worksheet and from the pop-up menu, select Rename. Rename your worksheet Source_Information. Now click anywhere on the worksheet. Your screen should resemble Figure 1.
7. Position your pointer on cell D3 and highlight all cells that contain data. Click on the Insert tab at the top of the page. Select PivotTable, located in the Tables group at the top left corner of your screen. A pop-up window will display on your screen. Notice that the data on your worksheet is surrounded by a moving black and white line. See Figure 2.

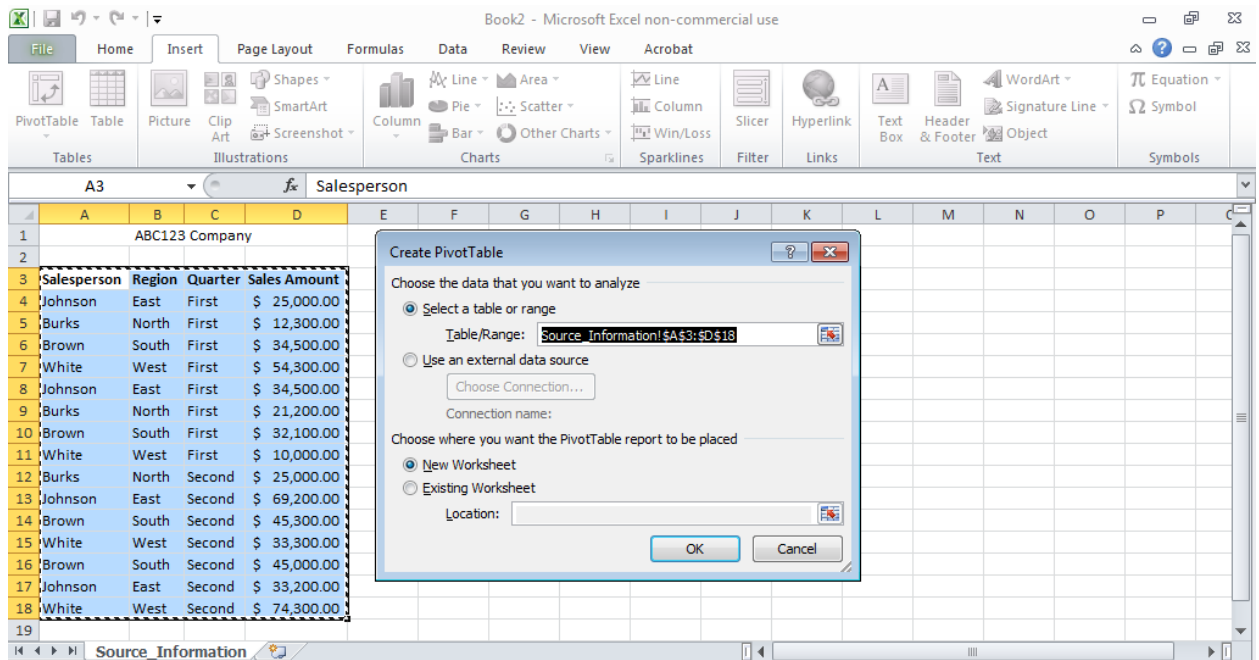


Figure 2

- Click OK. Your screen should now resemble Figure 3.

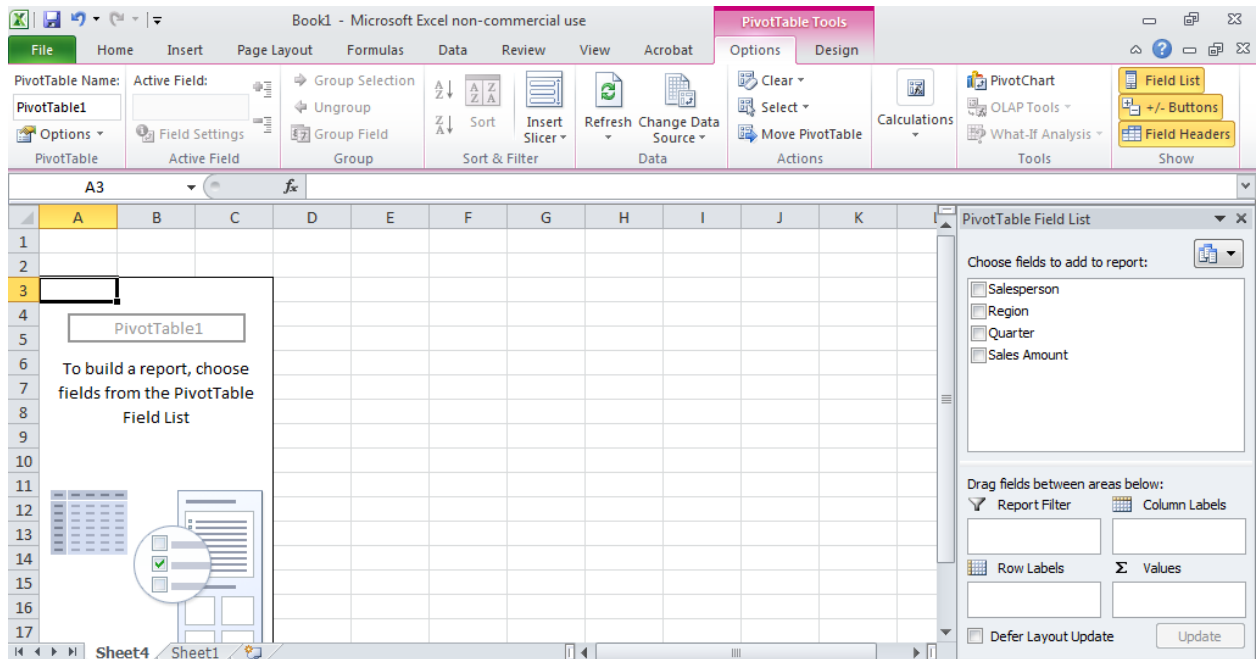


Figure 3

- On the PivotTable Field List menu, check the boxes next to the fields you want to add to a report. For example, click the boxes next to Salesperson and Sales Amounts. Microsoft Excel 2010 will summarize each salesperson's first and second quarter sales in one report. It will also give a grand total of all sales for both quarters.

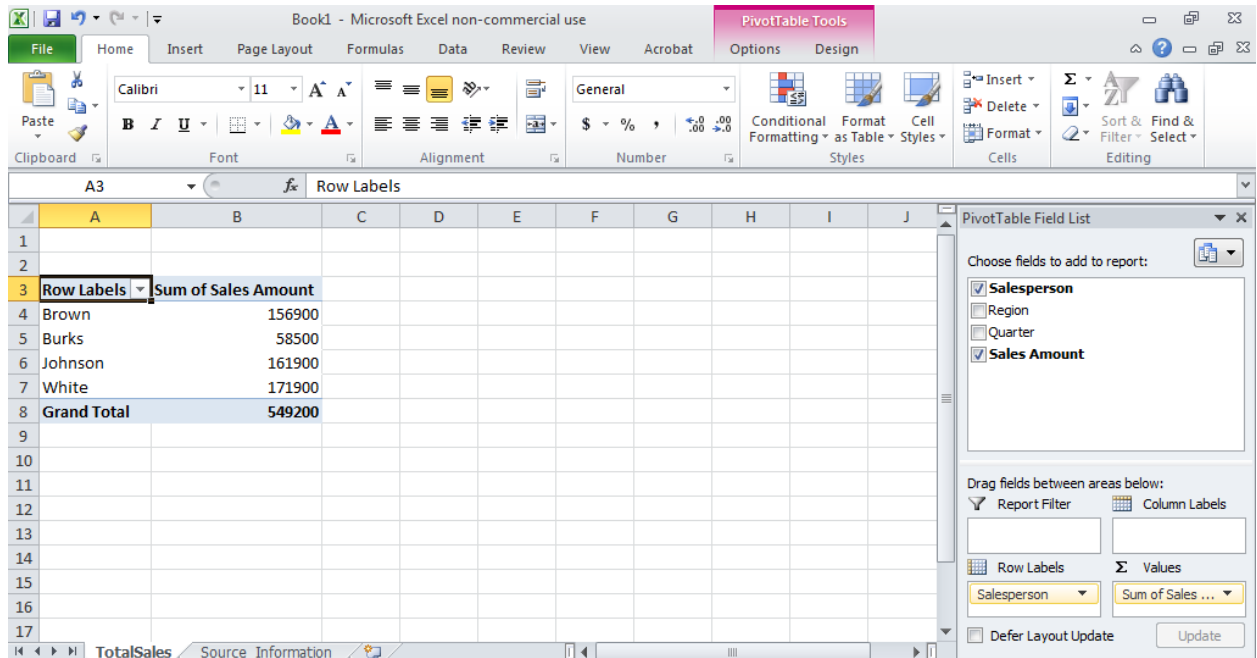


Figure 4

10. To change the heading “Row Labels” to “Salesperson”, just double-click inside the cell to rename it. The same applies to the “Sum of Sales Amount” heading.
11. You can rename this worksheet by following Step 6. Rename this worksheet “Total Sales.”

You can filter the sales information for each salesperson by clicking on the down arrow next to the heading “Row Labels” or “Salesperson”, if you renamed it.

Double-clicking on the “Sum of Sales Amount” heading will allow you to select a variety of calculations for your data, including average sales per salesperson, the maximum amount of sales per person, the minimum sales amount per person, and so on. You can format the numbers to display as dollar amounts by highlighting them and selecting \$ in the Numbers group on the Home tab.

For each report you want to generate, follow steps 7 through 11.

12. Save your file by clicking on the File tab. Select Save As from the displayed menu. Give your file a meaningful name (Example: SalesFirstSecondQtr) and save it on the source of your choice (your computer’s hard drive, USB flash drive, etc).

For a graphic representation of sales for each salesperson, follow these steps:

1. Make sure the displayed worksheet is the Source_Information worksheet. Highlight the same information as you did above for the PivotTable report.

- Click on the Insert tab, select the down arrow under PivotTable. Click on PivotChart. Your screen should resemble Figure 5.

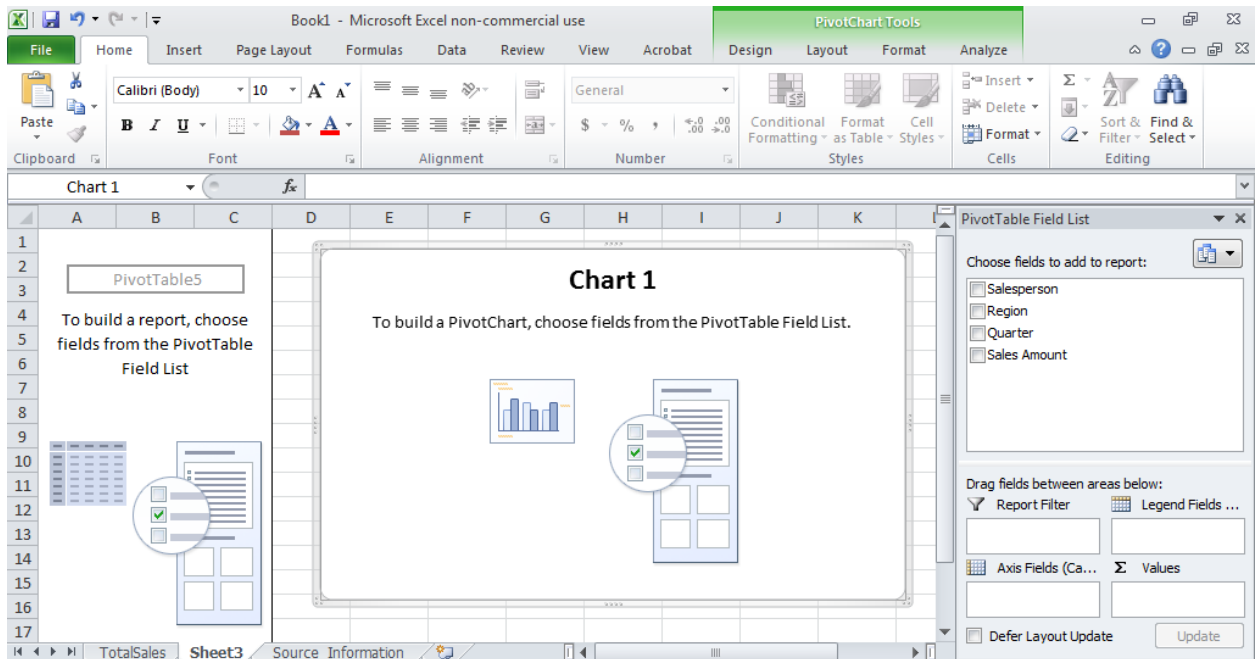


Figure 5

- On the PivotTable field list, select the checkboxes next to Salesperson and Sales Amount. Information will appear in the first two boxes on your screen as you select/deselect checkboxes in the PivotTable field list.

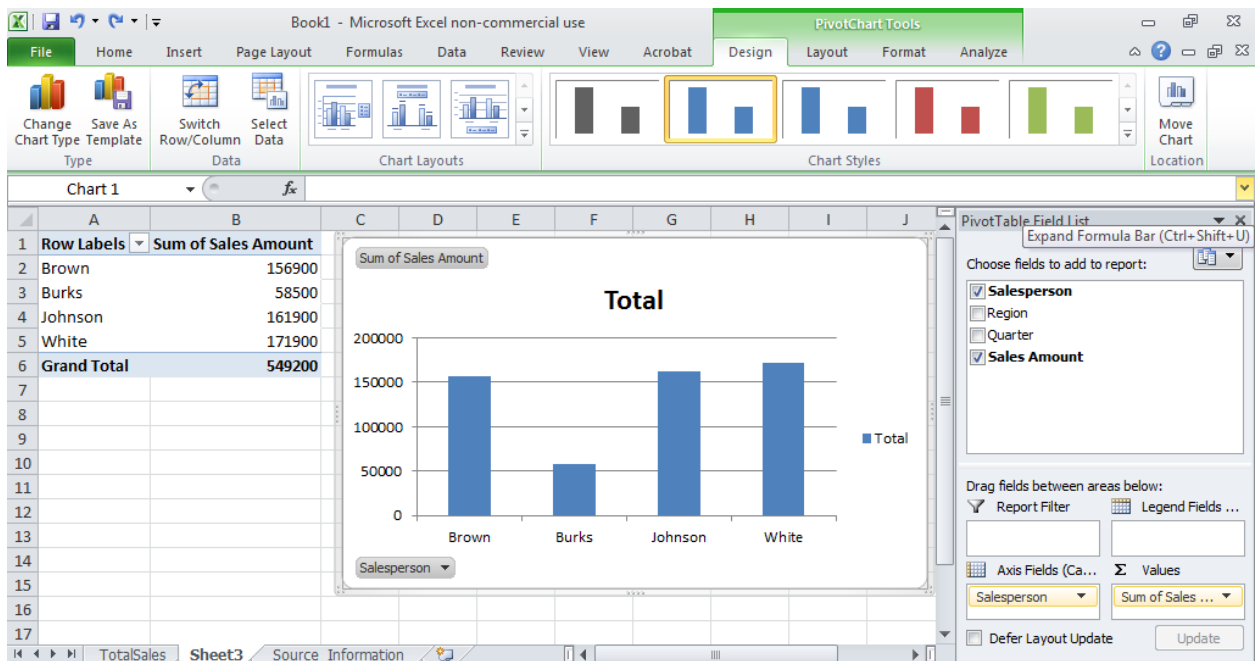


Figure 6

- Click on the "Move Chart" tab in the Location group.

5. In the Move Chart pop-up menu, select **New Sheet** and rename Chart1 to SalesChart. Press OK.
6. You can experiment with various styles/designs for your chart by clicking on the down arrow key in the Chart Styles group as well as Chart Layout group.
7. Remember to save your file again.
8. To print the chart or any individual worksheets within the workbook, make the worksheet active that you want to print. (Have the page you want to print displayed on your screen)
9. Click the File tab. On the displayed menu, select Print.
10. Click the Print button located on the top of your screen.

If you want to print the entire workbook, follow step 9. Under the “Settings” heading, click the down arrow key. Select “Print Entire Workbook.”