

Pivot Tables (Lesson 9 Handout)

If you find yourself with a significant amount of raw data that you want to answer questions with, a pivot table is a great way to look at various summaries of that data that you can use to draw conclusions. Before you start creating a pivot table, think about what questions you want to answer with the data and how it should be summarized to answer those questions. Sketching out how you want it displayed can be helpful.

Steps to Create a Pivot Table in Excel:

1. Put your data in excel. It should be in a format that has one row for each entry, meaning that it hasn't yet been summarized.
2. Make sure a cell in your data is selected and go to the Data ribbon and click 'Pivot Table' to create an automatic pivot table.
3. Unclick the pre-selected column headers and drag the header(s) you want listed on the left side of the pivot table to the 'rows' area.
4. Drag the header(s) you want listed on the top of the pivot table to the 'columns' area.
5. Drag the data you want summarized to the 'values' area.
6. Choose the type of summary you want to apply to the values.

| Count of Activity | Attendance | Post-test | Registration | Grand Total |
|---------------------|------------|-----------|--------------|-------------|
| Barndt, Ann Marie | 2 | 1 | 1 | 4 |
| Dominguez, Juan | 2 | 1 | 1 | 4 |
| Flowers, Isaacs | 2 | 1 | 1 | 4 |
| Jones, Nyeem | 2 | 1 | 1 | 4 |
| Miranda, Joshua | 2 | 1 | 1 | 4 |
| Noll, Konnor | 2 | 1 | 1 | 4 |
| Ochoa, Litzy | 2 | 1 | 1 | 4 |
| Saffold, Jedaiah | 2 | 1 | 1 | 4 |
| Villagomez, Anthony | 2 | 1 | 1 | 4 |
| Williams, Keegan | 2 | 1 | 1 | 4 |
| Grand Total | 20 | 10 | 10 | 40 |

These are the headers from the data that you can summarize

Bonus Excel Tips:

- You can create a filter by dragging a header to that area and it will allow you to only view the summaries for data that meets that criterion.
- If you want to work with dates, but want them summarized into months or years, you can right-click on a date in the pivot table and select 'Group' and then choose what kind of group(s) you want to use.

Steps to Create a Pivot Table in Google Sheets:

1. Put your data in Sheets. It should be in a format that has one row for each entry, meaning that it hasn't yet been summarized.
2. Make sure a cell in your data is selected and go to the Data menu and click 'Pivot Table' to create an automatic pivot table.
3. Under the Rows area, select which header(s) you want summarized on the left of the table.
4. Under the Columns area, select which header(s) you want summarized on the top of the table.
5. In the Values area, select which values you want summarized and how you want them summarized. In Sheets, "COUNTA" is used for counting text values and "COUNT" is used for counting only number values.

The screenshot shows a Google Sheets interface with a pivot table and the Report Editor. The pivot table is located in the range A1:H41. The data is summarized by Name (Rows) and Activity (Columns). The values are summarized by Activity using the COUNTA function. The Report Editor shows the following settings:

- Rows - Add field
- Group by: Name
- Order: Ascending
- Sort by: Name
- Show totals:
- Columns - Add field
- Group by: Activity
- Order: Ascending
- Sort by: Activity
- Show totals:
- Values - Add field
- Display: Activity
- Summarize by: COUNTA

| | A | B | C | D | E |
|----|---------------------|------------|-----------|--------------|-------------|
| 1 | | Attendance | Post-test | Registration | Grand Total |
| 2 | Barndt, Ann Marie | 2 | 1 | 1 | 4 |
| 3 | Dominguez, Juan | 2 | 1 | 1 | 4 |
| 4 | Flowers, Isaics | 2 | 1 | 1 | 4 |
| 5 | Jones, Nyeem | 2 | 1 | 1 | 4 |
| 6 | Miranda, Joshua | 2 | 1 | 1 | 4 |
| 7 | Noll, Konnor | 2 | 1 | 1 | 4 |
| 8 | Ochoa, Litzzy | 2 | 1 | 1 | 4 |
| 9 | Saffold, Jedaiah | 2 | 1 | 1 | 4 |
| 10 | Villagomez, Anthony | 2 | 1 | 1 | 4 |
| 11 | Williams, Keagan | 2 | 1 | 1 | 4 |
| 12 | Grand Total | 20 | 10 | 10 | 40 |