

Reference Guide for Pivot Tables Section 1



Presented by
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PIVOT TABLES

A reference guide



OVERVIEW

This reference guide uses two different excel files to help guide a new employee through the basic functions of using a Pivot Table. Two excel files are used: a "Financial Statement" with no relevance to Frontier, and a "Delivery Variance Report" which is a report commonly used by Frontier.

OUTLINE:

- **Section 1: The Basics**
- **Section 2: Using Filters**
- **Section 3: Distinct Counts**

SECTION 1

Topics of discussion

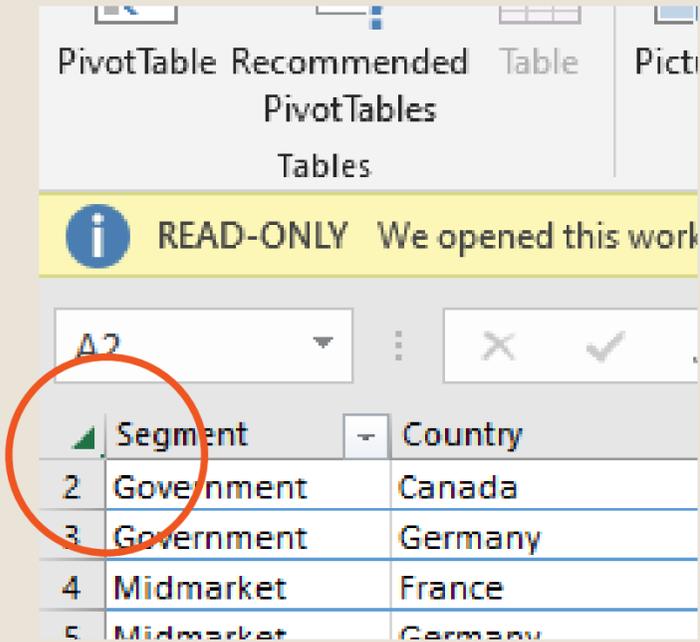


SECTION 1: THE BASICS

- What is a Pivot Table?
- Selecting a range
- Inserting a Pivot Table
- Refreshing data
- Fields & areas

WHAT IS A PIVOT TABLE?

A Pivot Table is a helpful tool offered in Microsoft Excel that allows you to summarize large groups of data. A Pivot Table presents the data in a way that can be easily understood and manipulated to find valuable information.



SELECTING THE RANGE

This will allow you to select the data you want to include and view in more detail

STEP 1:

Click the arrow in the top left-hand corner of the sheet to select the entire area of data

INSERTING A PIVOT TABLE

STEP 1:

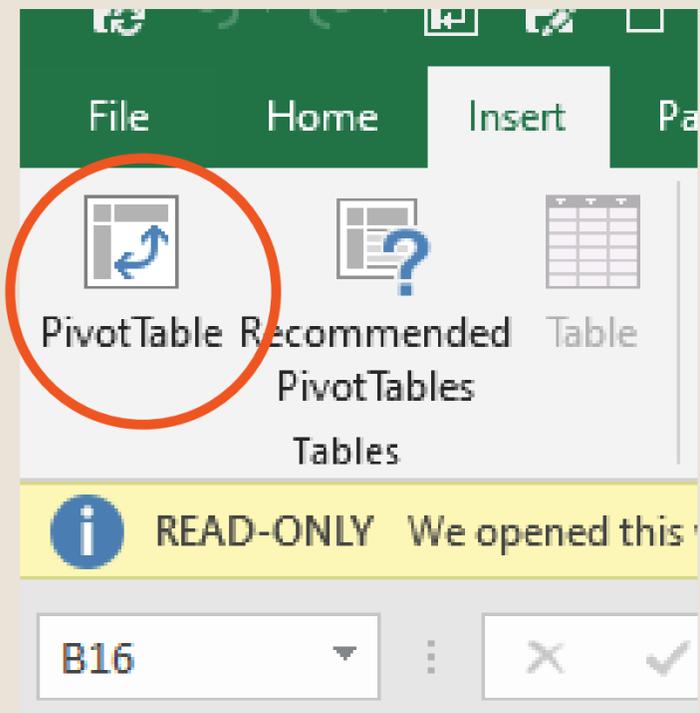
Under the insert tab on the main menu select "Pivot Table" on the left-hand side

STEP 2:

A screen will appear asking you to select a range of data

STEP 3:

Confirm that it is the data you wish to include and select "OK"



SECTION 1

Selecting a range
& inserting a Pivot
Table

SECTION 1

Design

DESIGN OF THE PIVOT TABLE

The Pivot Table may be hard to read in a way that makes sense or is visually appealing

CHANGING THE DESIGN:

STEP 1

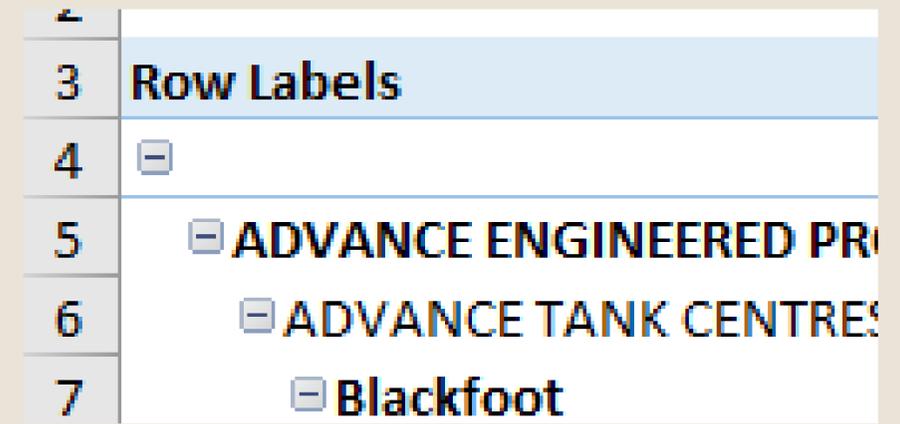
In the menu at the top, select "Design"

STEP 2

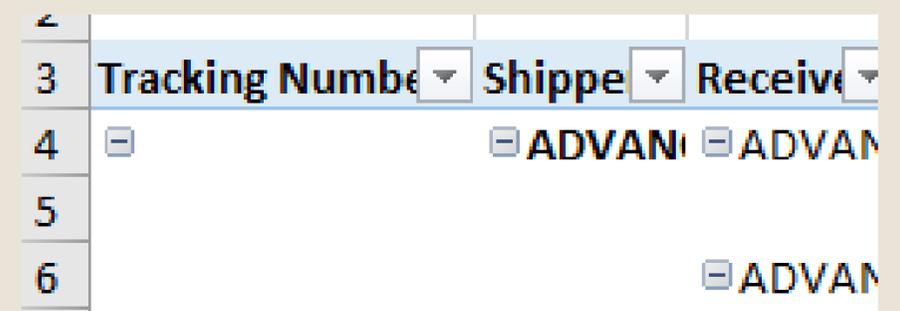
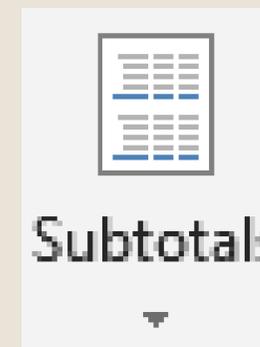
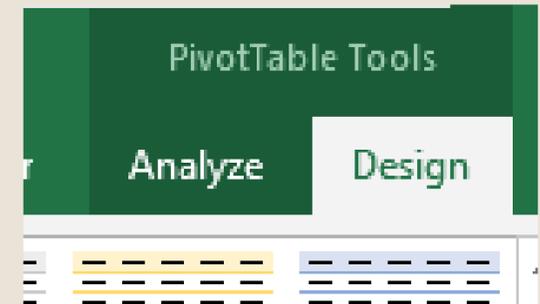
On the far left-hand side of the design menu, under "Subtotals" select "Do Not Show Subtotals"

STEP 3

On the far left-hand side of the design menu, under "Report Layout"" select "Show in Tabular Form"



3	Row Labels
4	[-]
5	[-] ADVANCE ENGINEERED PRO
6	[-] ADVANCE TANK CENTRES
7	[-] Blackfoot



3	Tracking Number	Shipper	Receiver
4	[-]	[-] ADVAN	[-] ADVAN
5			
6			[-] ADVAN

	A
1	
2	
3	Row Labels
4	** Order cancelled
5	Appointment Date
6	Arrive Delivery Facility
7	Arrived At Pick-Up Location
8	Arrived at Terminal
9	Assigned
10	Available at Smart Spot for pickup



REFRESHING DATA

If new data is added to the spreadsheet, you must refresh the corresponding PivotTable for it to update

STEP 1

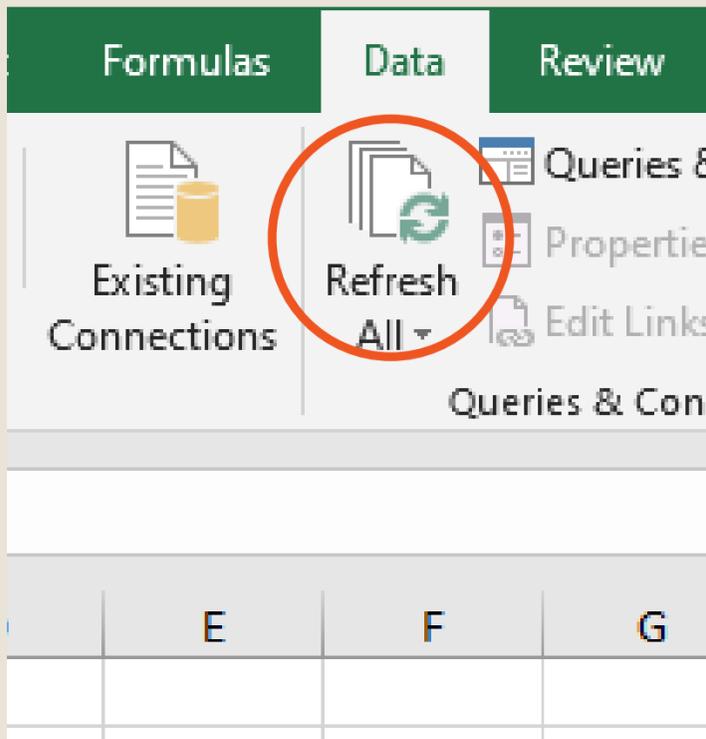
Select any portion of the Pivot Table field to indicate the area that you want to update

STEP 2

Under the data tab on the top menu, select data

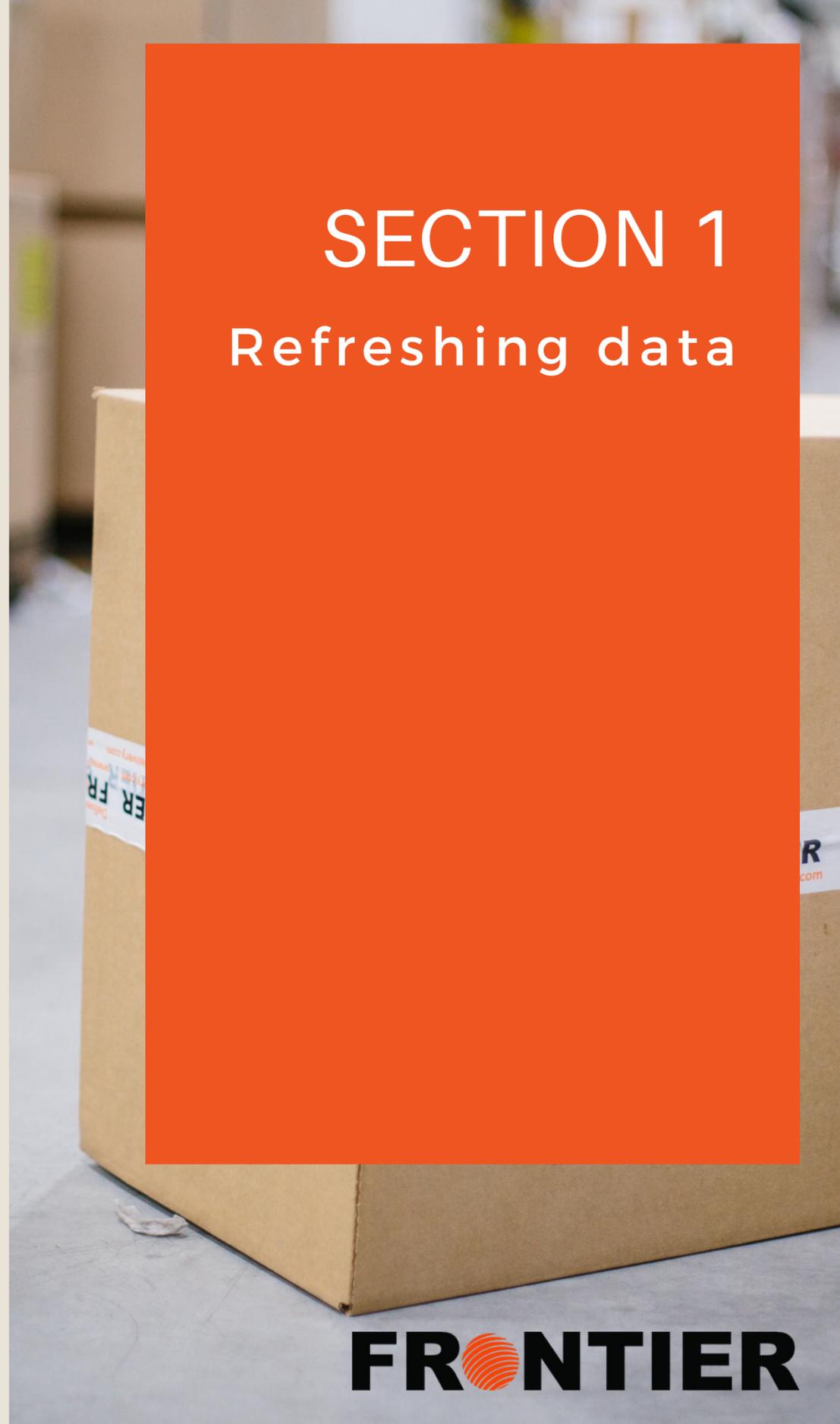
STEP 3

Click "Refresh All" to include the data that was added to the corresponding sheet



SECTION 1

Refreshing data



COLUMN TOTALS

- Used to find the sum of a column or row of numbers

STEP 1

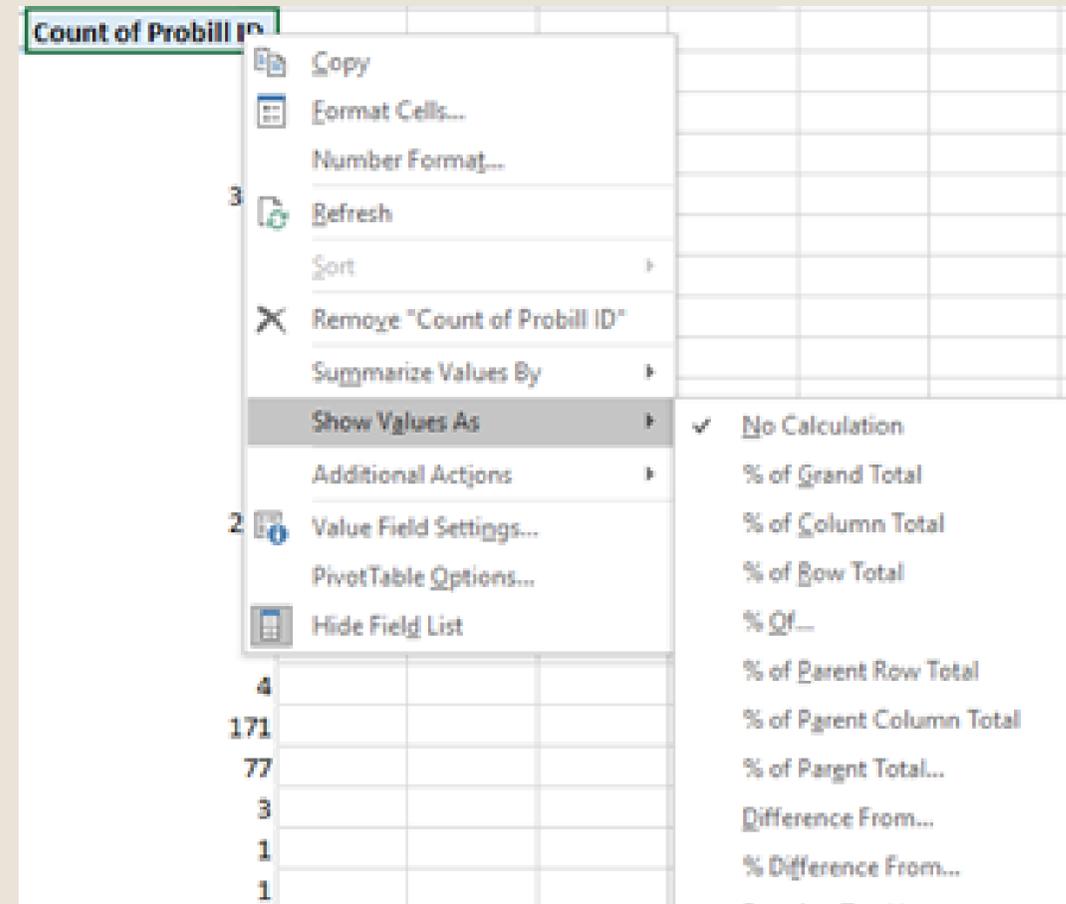
In the Pivot Table, select any singular cell in the column you you want to sum

3	Row Labels	Count of Shipper Name
4	2540037 Ontario Inc. dba Furniture Warehouse Brampton	11
5	A Plus Restaurant Equipment and Supplies	1

STEP 2

Right click the selected cell scroll down to "Show Value as" and select the desired type of percentage

- Please note whether a distinct count is needed to avoid counting duplicate values** (see section 3)



SECTION 1

Column totals

SECTION 1

Pivot Table Fields

PIVOT TABLE FIELDS

Pivot Table Fields are created based on the column header data from the selected data range in the worksheet.

DATA SET

	A	B	C	
1	Probill ID	Piece ID (Barcode)	Tracking Number	Shipper Name
2	PFS1600176	LDC50266692	DZN053500002	SPF
3	PFS1608230	LDEN1097178	3278194	Enc
4	PFS1608230	LDEN1097330	3278194	Enc

PIVOT TABLE FIELDS

Choose fields to add to report:  

Search 

- Probill ID
- Piece ID (Barcode)
- Tracking Number
- Shipper Name
- Receiver Name

USING A FIELD:

STEP 1

Select any cell that is in the Pivot Table Report to make the "Pivot Table Field appear".

STEP 2

Drag the field into one of the 4 areas

SECTION 1

Pivot Table Areas

PIVOT TABLE AREAS

There are four Pivot Table areas

- Filters
- Columns
- Rows
- Values

HOW TO USE AN AREA

STEP 1

Simply drag and drop the individual field into one of the area's.

STEP 2

Drag the field into one of the 4 areas

Drag fields between areas below:

Filters	Columns
Rows	Values
Receiver City ▼	Count of Carri... ▼
Receiver Name ▼	

SECTION 1

Value field settings



VALUES AREA

As soon as you drop a Field into the Values Area it will automatically change the value of the Field to a "Sum" value.

VALUE SETTING

You can change the value setting in the Value area by right clicking on the specified field and clicking "Value Field Settings".

VALUE FIELD SETTINGS:

- Count
- Max
- Min
- Average

SECTION 1

Using Pivot Table Areas

STEP 3 "VALUE FIELD SETTING" EXAMPLE

The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable has 'Row Labels' in column A and 'Count of Carrier' in column B. The data is as follows:

Row Labels	Count of Carrier
ABBOTSFORD	3
AVENUE MACHINERY CORP (Abbotsf	2
JACQUIE MLCAK	1
Aberdeen	1
Joanne Pence	1
Airdrie	20
Alexandra Owens	1

The 'Value Field Settings' dialog box is open, showing the following settings:

- Source Name: Carrier
- Custom Name: Count of Carrier
- Summarize Values By: Show Values As
- Summarize value field by: Count (selected)

The 'PivotTable Fields' task pane on the right shows the following fields:

- Receiver Name (checked)
- Receiver City (checked)
- Receiver State (unchecked)
- Receiver Postal (unchecked)

The 'Drag fields between areas below:' section shows:

- Filters: (empty)
- Columns: (empty)
- Rows: Receiver City, Receiver Name
- Values: Count of Carrier