12 Tips and Tricks for MS Excel - working with Pivots

1. **Check your source data**
   Make sure you have well organised source data before creating your Pivot with no blank rows or columns. Each column need a unique name and only be 1 row and every field will have a value in every row.

2. **Count your data first**
   When you first create your pivot, first make sure your Pivot is processing the data you expect it to. Simply add any text field as a Value and a small Pivot will appear that is the total number of rows in your data. If this makes sense, you know your source data is correct.

3. **Use a Table for your Pivot**
   Convert your range of data into a Table by clicking into the data and holding down the Control key and tapping the letter T – yes that easy. Once you have your Table you can Summarise it with the PivotTable option.

4. **Count data with your Pivot**
   A Pivot will count any text field – this can be really useful if you need to a count of employees by department for example.

5. **Show totals as a percentage**
   If you want to show totals as a percentage i.e. Sales by product you can – add the Product field as a row label and Sales as a Value. Right click on the Sales field and set Show Values as % of grand total.

6. **Find unique fields only**
   Because Pivots summarise data, it can be used to find unique values in a field. This is great to quickly see all the values that appear in a field and also find spelling errors and other inconsistences. Create your Pivot, add the Product as a Row label and the pivot will show a list of all products.

7. **Group numeric data into ranges**
   If you need to summarise your data by age group – you can. Create your Pivot and add the ages as a row label and names as Values. Right click on any value in the age field and choose Group. Enter 10 as the interval and when you click on OK, you will see the ages grouped by ages into 10 year buckets!

8. **Add fields more than once**
   May seem odd but there are many occasions when you may want to not only show the count of employees in departments but also count as a percentage too. The easiest way is to add the same field twice as a Value field. So simply add Department to the column labels and the names of the employees to the value field twice. Now right click on the 2nd instance and change Show Values to % of Grand total and job done!

9. **Automatically format all Value fields**
   Numeric data will be added as a General number format since it's a number. The best way to change it is to right click on the sales field and select Value Field Settings and click Number format and set it to Currency and click on OK.

10. **Compact layout**
    By default, new pivots are created as a Compact layout which displays row and column labels which aren't always easy to understand. To change this, go to the Design ribbon tab and Report Layout and choose either Show in Outline Form or Tabular Form.

11. **Add a little white space around your Pivot to make it look more sophisticated**

12. **Try the Recommended PivotTables option instead of dragging and dropping your fields.**
    This feature is easy to use and feels good as it's like you're cheating!
    You'll find it on the insert ribbon tab.