Contents at a Glance

1. Introduction

2. Pivot Table Fundamentals

3. Creating a Basic Pivot Table

4. Customizing a Pivot Table

5. Grouping, Sorting, and Filtering Pivot Data

6. Performing Calculations Within Pivot Tables

7. Using Pivot Charts and Other Visualizations

8. Analyzing Disparate Data Sources with Pivot Tables

9. Sharing Pivot Tables with Others

10. Working with and Analyzing OLAP Data

11. Mashing Up Data with PowerPivot

12. Enhancing Pivot Table Reports with Macros

13. Using VBA to Create Pivot Tables

14. Advanced Pivot Table Tips and Techniques

A. Dr. Jekyll and Mr. GetPivotData

Index
3 Customizing a Pivot Table .................................................................45

Making Common Cosmetic Changes..........................................................46
- Applying a Table Style to Restore Gridlines .................................................47
- Changing the Number Format to Add Thousands Separators ..................48
- Replacing Blanks with Zeros...................................................................49
- Changing a Field Name ...........................................................................50

Making Layout Changes................................................................................51
- Using the New Compact Layout.................................................................52
- Using the Outline Form Layout.................................................................53
- Using the Traditional Tabular Layout.........................................................54
- Controlling Blank Lines, Grand Totals, Subtotals, and Other Settings .......57

Customizing the Pivot Table Appearance with Styles and Themes .............58
- Customizing a Style..................................................................................60
- Choosing a Default Style for Future Pivot Tables .......................................61
- Modifying Styles with Document Themes ................................................62

Changing Summary Calculations................................................................63
- Understanding Why One Blank Cell Causes a Count ...............................63
- Using Functions Other Than Count or Sum ..............................................64

Adding and Removing Subtotals ................................................................65
- Suppress Subtotals When You Have Many Row Fields ............................65
- Adding Multiple Subtotals for One Field ..................................................66

Using Running Total, % of, Rank Options ...................................................66
- Tracking YTD Numbers with Running Total In ..........................................70
- Tracking Percent of Running Total............................................................70
- Tracking Percent of Parent Item.................................................................71
- Display Change from a Previous Field........................................................72
- Showing Rank............................................................................................72
- Using % of to Compare One Line to Another Line .....................................74
- Track Relative Importance with the Index Option .....................................74

Next Steps....................................................................................................78

4 Grouping, Sorting, and Filtering Pivot Data.............................................79

Grouping Pivot Fields.................................................................................80
- Grouping Date Fields ...............................................................................80
- Including Years When Grouping by Months ..............................................81
- Grouping Date Fields by Week ..................................................................82
- Grouping Two Date Fields in One Report ..................................................83
- Grouping Numeric Fields .........................................................................85
- Ungrouping ..............................................................................................85

Looking at the PivotTable Field List.............................................................85
- Docking and Undocking the PivotTable Field List ......................................86
- Rearranging the PivotTable Field List.........................................................87
- Rearranging the PivotTable Field Lists.......................................................87
- Using the Areas Section Drop-Downs .........................................................88
- Using the Fields Drop-Down .................................................................89
Method 1: Turn the Pivot Table into Hard Values ................................................................. 141
Method 2: Delete the Underlying Pivot Table ....................................................................... 142
Method 3: Distribute a Picture of the Pivot Chart ................................................................. 142
Method 4: Use Cells Linked to the Pivot Table as the Source Data ........................................ 142
Using Conditional Formatting with Pivot Tables......................................................................... 145
Next Steps................................................................................................................................... 151

7 Analyzing Disparate Data Sources with Pivot Tables ......................................................... 153
Using Multiple Consolidation Ranges ...................................................................................... 154
Analyzing the Anatomy of a Multiple Consolidation Range Pivot Table ................................. 159
The Row Field .......................................................................................................................... 160
The Column Field ................................................................................................................... 160
The Value Field ....................................................................................................................... 160
The Page Fields ....................................................................................................................... 161
Redefining Your Pivot Table .................................................................................................... 161
Building a Pivot Table Using External Data Sources ............................................................... 161
Building a Pivot Table with Microsoft Access Data ............................................................... 162
Building a Pivot Table with SQL Server Data .......................................................................... 165
Next Steps................................................................................................................................... 168

8 Sharing Pivot Tables with Others ....................................................................................... 169
Sharing a Pivot Table with Other Versions of Office ............................................................... 169
Compatibility Issues Between Excel 2007 and Excel 2010 .................................................... 170
Repeat All Labels Is Lost After Any Change in 2007 ............................................................... 172
Excel 2007 Pivot Tables Work Fine in Excel 2010 ................................................................. 172
Features Unavailable When a Legacy Pivot Table Is Opened in Excel 2010 ......................... 172
Excel 2010 Compatibility Mode ............................................................................................. 173
No Downgrade Path Available from Version 12 and Version 14 Pivot Tables ....................... 173
Strategies for Sharing Pivot Tables ......................................................................................... 173
Saving Pivot Tables to the Web ............................................................................................... 173
Using Web Services in Excel 2003 ......................................................................................... 173
Using Save As HTML in Excel 2010 Provides a Static Image ................................................ 174
Publishing Pivot Tables to Excel Services in Excel 2010 ....................................................... 175
Viewing Your Excel 2010 Pivot Table on the SkyDrive .......................................................... 181
Next Steps................................................................................................................................... 183

9 Working with and Analyzing OLAP Data ......................................................................... 185
What Is OLAP? ......................................................................................................................... 185
Connecting to an OLAP Cube ................................................................................................. 186
Understanding the Structure of an OLAP Cube ..................................................................... 188
Understanding Limitations of OLAP Pivot Tables ................................................................... 190
Creating Offline Cubes .......................................................................................................... 190
Breaking Out of the Pivot Table Mold with Cube Functions .................................................. 193
Next Steps................................................................................................................................... 195
10 Mashing Up Data with PowerPivot ....................................................... 197
   Benefits and Drawbacks to PowerPivot .............................................. 197
      Mega-Benefits of PowerPivot ......................................................... 197
      Moderate Benefits of PowerPivot .................................................. 198
      Why Is This Free? ......................................................................... 198
      Benefits of the Server Version of PowerPivot ............................... 199
   Drawbacks to Using PowerPivot ......................................................... 200
   Installing PowerPivot ........................................................................... 200
   Building a PowerPivot Report ......................................................... 201
      Import a Text File .......................................................................... 201
      Add Excel Data by Copying and Pasting ........................................ 205
      Add Excel Data By Linking ............................................................ 206
      Define Relationships ....................................................................... 207
      Add Calculated Columns Using DAX ............................................. 208
      Build a Pivot Table ......................................................................... 209
      Slicers in PowerPivot ....................................................................... 211
   Some Things Are Different .................................................................. 212
   Two Kinds of DAX Calculations ....................................................... 213
      DAX Calculations for Calculated Columns ..................................... 214
      Using RELATED( ) to Base a Column Calculation on Another Table 216
      Using DAX to Create New Measures ............................................ 218
      Count Distinct Using DAX ............................................................ 219
      When “Filter, Then Calculate” Does Not Work in DAX Measures ... 222
      Mix in Those Amazing Time Intelligence Functions ....................... 225
      Using PowerPivot To Access Named Sets For Asymmetric Reporting 228
   Other Notes ....................................................................................... 228
      Combination Layouts ...................................................................... 228
      Report Formatting .......................................................................... 230
   Refreshing PowerPivot Versus Refreshing Pivot Table ...................... 231
   Other Issues ..................................................................................... 231
   Next Steps ......................................................................................... 231

11 Enhancing Pivot Table Reports with Macros .................................... 233
   Why Use Macros with Your Pivot Table Reports? ............................. 233
   Recording Your First Macro ............................................................. 234
   Creating a User Interface with Form Controls .................................. 236
   Altering a Recorded Macro to Add Functionality ............................... 238
   Next Steps ....................................................................................... 246

12 Using VBA to Create Pivot Tables .................................................... 247
   Introducing VBA ............................................................................... 247
   Enabling VBA in Your Copy of Excel ............................................... 247
   Using a File Format That Enables Macros ........................................ 248
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visual Basic Editor</td>
<td>249</td>
</tr>
<tr>
<td>Visual Basic Tools</td>
<td>250</td>
</tr>
<tr>
<td>The Macro Recorder</td>
<td>250</td>
</tr>
<tr>
<td>Understanding Object-Oriented Code</td>
<td>251</td>
</tr>
<tr>
<td>Learning Tricks of the Trade</td>
<td>251</td>
</tr>
<tr>
<td>Writing Code to Handle Any Size Data Range</td>
<td>251</td>
</tr>
<tr>
<td>Using Super-Variables: Object Variables</td>
<td>252</td>
</tr>
<tr>
<td>Using With and End With to Shorten Code</td>
<td>253</td>
</tr>
<tr>
<td>Understanding Versions</td>
<td>253</td>
</tr>
<tr>
<td>New in Excel 2010</td>
<td>254</td>
</tr>
<tr>
<td>Concepts Introduced in Excel 2007</td>
<td>254</td>
</tr>
<tr>
<td>Building a Pivot Table in Excel VBA</td>
<td>256</td>
</tr>
<tr>
<td>Adding Fields to the Data Area</td>
<td>258</td>
</tr>
<tr>
<td>Formatting the Pivot Table</td>
<td>258</td>
</tr>
<tr>
<td>Dealing with Limitations of Pivot Tables</td>
<td>260</td>
</tr>
<tr>
<td>Filling Blank Cells in the Data Area</td>
<td>261</td>
</tr>
<tr>
<td>Filling Blank Cells in the Row Area</td>
<td>261</td>
</tr>
<tr>
<td>Learning Why You Cannot Move or Change Part of a Pivot Report</td>
<td>261</td>
</tr>
<tr>
<td>Controlling Totals</td>
<td>262</td>
</tr>
<tr>
<td>Determining Size of a Finished Pivot Table to Convert the Pivot Table to Values</td>
<td>263</td>
</tr>
<tr>
<td>Pivot Table 201: Creating a Report Showing Revenue by Category</td>
<td>266</td>
</tr>
<tr>
<td>Ensuring Tabular Layout Is Utilized</td>
<td>268</td>
</tr>
<tr>
<td>Rolling Daily Dates Up to Years</td>
<td>269</td>
</tr>
<tr>
<td>Eliminating Blank Cells</td>
<td>270</td>
</tr>
<tr>
<td>Controlling the Sort Order with AutoSort</td>
<td>271</td>
</tr>
<tr>
<td>Changing Default Number Format</td>
<td>271</td>
</tr>
<tr>
<td>Suppressing Subtotals for Multiple Row Fields</td>
<td>272</td>
</tr>
<tr>
<td>Copying Finished Pivot Table as Values to a New Workbook</td>
<td>273</td>
</tr>
<tr>
<td>Handling Final Formatting</td>
<td>274</td>
</tr>
<tr>
<td>Adding Subtotals to Get Page Breaks</td>
<td>275</td>
</tr>
<tr>
<td>Putting It All Together</td>
<td>276</td>
</tr>
<tr>
<td>Calculating with a Pivot Table</td>
<td>278</td>
</tr>
<tr>
<td>Addressing Issues with Two or More Data Fields</td>
<td>279</td>
</tr>
<tr>
<td>Using Calculations Other Than Sum</td>
<td>280</td>
</tr>
<tr>
<td>Generating a Count Distinct</td>
<td>282</td>
</tr>
<tr>
<td>Calculated Data Fields</td>
<td>284</td>
</tr>
<tr>
<td>Calculated Items</td>
<td>285</td>
</tr>
<tr>
<td>Calculating Groups</td>
<td>286</td>
</tr>
<tr>
<td>Using Show Values As to Perform Other Calculations</td>
<td>288</td>
</tr>
<tr>
<td>Using Advanced Pivot Table Techniques</td>
<td>290</td>
</tr>
<tr>
<td>Using AutoShow to Produce Executive Overviews</td>
<td>290</td>
</tr>
<tr>
<td>Using ShowDetail to Filter a Recordset</td>
<td>292</td>
</tr>
<tr>
<td>Creating Reports for Each Region or Model</td>
<td>294</td>
</tr>
</tbody>
</table>
Dedication

To Josh Jelen
—Bill Jelen

To Josh Jelen, too. Hey, this is the third edition...why not?
—Mike Alexander

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—Bill Jelen

Thanks to Bill Jelen for deciding to coauthor this book with me many editions ago. His knowledge of Excel still blows me away to this day. My deepest thanks to Loretta Yates, for all the hours of work put into bringing this book to life. Thanks also to Bob Umlas for making sure Bill and I don’t embarrass ourselves with technical errors. Bob suggested numerous improvements to the examples and text in this book. Finally, a special thank you goes to the wife and kids for putting up with all the time spent locked away on this project.

—Mike Alexander
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Please note that I cannot help you with technical problems related to the topic of this book. We do have a User Services group, however, where I will forward specific technical questions related to the book.

When you write, please be sure to include this book’s title and author as well as your name, email address, and phone number. I will carefully review your comments and share them with the author and editors who worked on the book.

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Introduction

Pivot tables are the single most powerful command in all of Excel. They came along during the 1990s when Microsoft and Lotus were locked in a bitter battle for dominance of the spreadsheet market. The race to continually add enhanced features to their respective products during the mid-1990s led to many incredible features, but none as powerful as the pivot table.

With a pivot table, you can take 1 million rows of transactional data and transform it into a summary report in seconds. If you can drag a mouse, you can create a pivot table. In addition to quickly summarizing and calculating data, pivot tables allow you to change your analysis on the fly by simply moving fields from one area of a report to another.

No other tool in Excel gives you the flexibility and analytical power of pivot tables.

What You Will Learn from This Book

It is widely agreed that close to 50 percent of Excel users leave 80 percent of Excel untouched. That is, most users do not tap into the full potential of Excel’s built-in utilities. Of these utilities, the most prolific by far is the pivot table. Despite the fact that pivot tables have been a cornerstone of Excel for more than 15 years, they remain one of the most underutilized tools in the entire Microsoft Office Suite. Having picked up this book, you are savvy enough to have heard of pivot tables or even have used them on occasion. You have a sense that pivot tables have a power that you are not using, and you want to learn how to leverage that power to increase your productivity quickly.

Within the first two chapters, you will be able to create basic pivot tables, increase your productivity, and produce reports in minutes instead of hours. Within the first seven chapters, you will be able to
output complex pivot reports with drill-down capabilities accompanying charts. By the end of the book, you will be able to build a dynamic pivot table reporting system.

What Is New in Excel 2010’s Pivot Tables

Excel 2010 introduces three new features designed to solve common problems with pivot tables. Combined with the two items added to Excel 2007, you have five great improvements to pivot tables.

- Beginning in Excel 2007, multiple items could be selected from the filter drop-down. However, this feature left behind a confusing report because the filters section left the ambiguous words “(Multiple Items)” to explain which items are included in the filter. As shown in Figure I.1, the new Excel 2010 Slicers feature provides a graphical view of which items are selected for the pivot table. Read more about Slicers in Chapter 4, “Grouping, Sorting, and Filtering Pivot Data.”

![Figure I.1](https://via.placeholder.com/150)

Figure I.1
Slicers visually show which items are included in a filter.

- In legacy versions of Excel, one of the many calculation options available in pivot tables has been “Percentage of Column.” This feature was fine when you had only one field along the left side of the pivot table. However, if you had two or more fields, you might want to show the percentage of the next subtotal. In Excel 2010, Microsoft added new
calculation options including % of Parent and Rank. Calculation options are discussed in Chapter 3, “Customizing a Pivot Table.”

- A constant annoyance is the blank cells included in the outermost column fields. For an example, see A6:A7 in Figure I.1. At last, Excel 2010 offers the Design, Report Layout, Repeat All Item Labels to fill in those blank cells.

- PowerPivot is a free add-in from Microsoft that allows you to create pivot tables from external data or from separate sheets.

- If you skipped Excel 2007, you notice that the Pivot Table Field List has been expanded. Rather than dragging fields to drop zones on the pivot table itself, beginning with Excel 2007, you drag the fields to the drop zones in the pivot table field list. Excel 2007 also added filtering options.

Skills Required to Use This Book

We have created a reference that is comprehensive enough for hard-core analysts yet relevant to casual users of Excel. The bulk of the book covers how to use pivot tables in the Excel user interface. The final chapter describes how to create pivot tables in Excel’s powerful VBA macro language. This means that any user who has a firm grasp of basics, such as preparing data, copying, pasting, and entering simple formulas, should not have a problem understanding the concepts in this book.

CASE STUDY  LIFE BEFORE PIVOT TABLES

Imagine that it is 1992 and you are using Lotus 1-2-3 or Excel 4. You have thousands of rows of transactional data. Your manager asks you to prepare a summary report showing revenue by region and product. The following case study walks you through how this report would have been prepared in 1992.

In 1992, preparing this report was a daunting task. It required superhuman spreadsheet skills that few could master. Here are the steps you needed to take to prepare a summary report showing revenue by region and product:

1. You need to get a list of the unique regions in the data set. Use the Advanced Filter command with Unique Records Only to extract a list of the unique regions (see Figure I.2).
2. You also need to get a list of the unique products in the data set. Use the Advanced Filter command with Unique Records Only a second time to extract a list of the unique products.

3. Turn the list of regions sideways so that it runs across the columns. Copy the list of unique regions. Then select Edit, Paste Special, Transpose to arrange the regions as headings going across the report. You now have a skeleton of the report, as shown in Figure I.3.

4. Next, you need to build a DSUM formula to get total Sales for one product and region. DSUM requires that you build a criteria range as shown in R1:S2 in Figure I.4.

5. In the corner cell of the report, build the formula to get total sales for the selected product and region:

\[ =\text{DSUM}($A$5:$N$93160,$M$5,$R$1:$S$2) \]

This is a formula to test whether the region column is Canada and if the product is a Pizza Merchandiser.

---

**Figure I.2**
Even today, the Advanced Filter command is not a lot of fun to use.

**Figure I.3**
After using a second Advanced Filter command and selecting Edit, Paste Special, Transpose, you have this skeleton of the final report. You still have a long way to go.

**Figure I.4**
Use the ancient DSUM function with a four-cell criteria range.
6. You are a long-time, hard-core data analyst if you remember pressing the keystrokes for /Data Table 2 in Lotus 1-2-3. Figure I.5 shows the equivalent function in Excel. In Excel 2010, this command is found in Data, Data Tools, What If Analysis, Data Table.

![Figure I.5](image)
The Data Table command replicates the formula in the top-left corner of the table, but replaces two references in the formula with the headings at the top and left of the report.

7. Finally, after using two advanced filters and a Paste Transpose command, writing an obscure DSUM formula, and then using the Data Table command, you have the result your manager is looking for, as shown in Figure I.6. If you could pull off this analysis in 10 minutes, you were doing an amazing job.

![Figure I.6](image)
After displaying knowledge of obscure spreadsheet commands in 10 minutes, you have produced the needed report.

Now, if your manager looks at the report and asks you to add Market to the analysis, you are nearly back at square one because it will take an additional 10 minutes to produce the new report.

Invention of the Pivot Table

The concept that led to today’s pivot table came from the halls of the Lotus Development Corporation with a revolutionary spreadsheet program called Lotus Improv. Improv was envisioned in 1986 by Pito Salas of the Advanced Technology Group at Lotus (see Figure I.7). Realizing that spreadsheets often have patterns of data, Salas concluded that if a user could build a tool that could recognize these patterns, then he could build enhanced data models. Lotus ran with the concept and started developing the next-generation spreadsheet.
Throughout 1987, Lotus demonstrated its new program to a few companies. In 1988, Steve Jobs saw the program and immediately wanted it developed for his upcoming NeXT computer platform. The program, finally named Lotus Improv, was eventually shipped in 1991 for the NeXT platform. A version for Windows was introduced in 1993.

The core concept behind Improv was that data, data views, and formulas should be encapsulated as separate entities and treated as different animals. For the first time in a spreadsheet program, a data set was given a name that could be grouped into larger categories. This naming and grouping capability paved the way for the most powerful feature in Improv: rearranging data. With Improv, a user could define and store a set of categories and then change the view by simply dragging the category names with the mouse. The user could also create totals and group summaries.

Microsoft eventually incorporated this concept in its pivot table functionality in Excel 5. Years later, with the release of Excel 97, Microsoft offered users an enhanced pivot table wizard and key improvements to pivot table functionality such as the capability to add calculated fields. Excel 97 also opened the pivot cache to developers, fundamentally changing the way pivot tables are created and managed. Microsoft introduced the pivot chart with Excel 2000, providing users a way to represent pivot tables graphically. Excel 2002 added the GetPivotData function. Excel 2007 added new filters such as selecting dates in the “last quarter” or “this year.” Excel 2010 continues improving pivot tables with new features described previously.
CASE STUDY  LIFE AFTER PIVOT TABLES

Say you have 100,000 rows of transactional data, as discussed in the previous case study. Your manager asks you to prepare a summary report showing revenue by Region and Product. Fortunately, you have pivot tables at your disposal. Here are the steps you would follow today using Excel 2010:

1. Select a single cell in your data set. Select PivotTable from the Insert tab. Click OK. You are given a blank pivot table, as shown in Figure I.8.

2. From the Pivot Table Field List, select the Product Name check box. Excel adds a unique list of products to the left side of the pivot table. Select the Sale Amount check box. Excel adds total sales by product to the report. Click the Region field in the Field List and drag it to the Column Labels drop zone. After six mouse clicks, you have the required report, as shown in Figure I.9.

Figure I.8
After three mouse clicks, you have a blank pivot table report. Three more mouse clicks to go.

Figure I.9
Add three fields to the report.
If you are racing, you can actually create the report shown in Figure I.9 in exactly 10 seconds. This is an amazing accomplishment. Realistically, it would take you about 50 seconds at normal speed to create the report. If you are a spreadsheet wizard following the steps in the previous case study, the nonpivot table solution would take you at least 12 times longer.

 ToDo see the creation of a pivot table, search for Pivot Table Data Crunching Intro at YouTube.

In addition, when your manager comes back with the request to add Market to the analysis, you need just seconds to drag the Market field to the Column Labels drop zone in the PivotTable Field List to add it to the report, as shown in Figure I.10.

![Figure I.10](Image)

To create a new report with the Market field, simply drag the field to a drop zone.

Sample Files Used in This Book

All data files used throughout this book are available for download from [www.mrexcel.com/pivotbookdata2010.html](http://www.mrexcel.com/pivotbookdata2010.html).

Conventions Used in This Book

This book follows certain conventions:

- **Monospace**—Text messages you see onscreen or code that appears in a monospace font.
- **Bold Monospace**—Text you type appears in a **bold, monospace** font.
- **Italic**—New and important terms appear in *italics*.
- **Initial Caps**—Tab names, dialog box names, and dialog box elements are presented with initial capital letters so you can identify them easily.
Referring to Versions


Referring to Ribbon Commands

Office 2007 introduced a new interface called the Ribbon. The Ribbon is composed of several tabs labeled Home, Insert, Page Layout, and so on. When you click on the Page Layout tab, you see the icons available on the Page Layout tab.

When the active cell is inside a pivot table, two new tabs appear on the Ribbon. In the help files, Microsoft calls these tabs “PivotTable Tools, Options” and “PivotTable Tools, Design.” For convenience, this book refers to these elements as the Options tab and the Design tab, respectively. The new Slicer feature introduces a new Ribbon tab that Microsoft calls “Slicer Tools, Options.” This book refers to this as the Slicer tab.

In some cases, the Ribbon icon leads to a drop-down with additional choices. In these cases, the book lists the hierarchy of Ribbon, Icon, Menu Choice, and Submenu Choice. For example, in Figure I.11, the shorthand specifies “Select Design, Report Layout, Repeat All Item Labels.”

Figure I.11
For shorthand, instructions might say Select Design, Report Layout, Repeat All Item Labels.
Special Elements

This book contains the following special elements:

- **Notes** provide additional information outside the main thread of the chapter discussion that might be useful for you to know.

- **Tips** provide you with quick workarounds and time-saving techniques to help you do your work more efficiently.

- **Cautions** warn you about potential pitfalls you might encounter. Pay attention to Cautions because they alert you to problems that otherwise could cause you hours of frustration.

Some topics will be demonstrated in a short video cast at YouTube.

**CASE STUDY**

Case studies provide a real-world look at topics previously introduced in the chapter.
What Is a Pivot Table?

Imagine that Excel is a large toolbox that contains different tools at your disposal. The pivot table is essentially one tool in your Excel toolbox. If a pivot table were indeed a physical tool that you could hold in your hand, a kaleidoscope would most accurately represent it.

When you look through a kaleidoscope at an object, you see that object in a different way. You can turn the kaleidoscope to move around the details of the object. The object itself does not change, and it is not connected to the kaleidoscope. The kaleidoscope is simply a tool that you use to create a unique perspective on an ordinary object.

Think of a pivot table as a kaleidoscope that is pointed at your data set. When you look at your data set through a pivot table, you have the opportunity to see details in the data you might not have noticed before. Furthermore, you can turn your pivot table to see your data from different perspectives. The data set itself does not change, and it is not connected to the pivot table. The pivot table is simply a tool you are using to create a unique perspective on your data.

A pivot table allows you to create an interactive view of your data set. We call this view a pivot table report. With a pivot table report, you can quickly and easily categorize your data into groups, summarize large amounts of data into meaningful information, and perform a wide variety of calculations in a fraction of the time it takes by hand. But the real power of a pivot table report is that you can interactively drag and drop fields within your report, dynamically changing your perspective and recalculating totals to fit your current view.
Why Should You Use a Pivot Table?

As a rule, your dealings in Excel can be split into two categories: calculating data and shaping or formatting, data. Although many built-in tools and formulas facilitate both of these tasks, the pivot table is often the fastest and most efficient way to calculate and shape data.

Let's look at one simple scenario that illustrates this point. Say you have just given your manager some revenue information by month, and he has predictably asked for more information. He adds a note to the worksheet and emails it back to you. As you can see in Figure 1.1, your manager wants you to add a line that shows credits by month.

![Figure 1.1](image1.png)

To meet this new requirement, you run a query from your legacy system that provides the needed data. As usual, the data is formatted specifically to make you suffer. Instead of data by month, the legacy system provides detailed transactional data by day, as shown in Figure 1.2.

![Figure 1.2](image2.png)

Your challenge is to calculate the total dollar amount of credits by month and shape the results into an extract that fits the format of the original report. The final extract should look like the data shown in Figure 1.3.

![Figure 1.3](image3.png)
Creating this extract manually takes 18 mouse clicks and three keystrokes:

- Format dates to month: three clicks
- Create subtotals: four clicks
- Extract subtotals: six clicks, three keystrokes
- Transpose vertical to horizontal: five clicks

By contrast, creating this extract with a pivot table takes nine mouse clicks:

- Create the pivot table report: five clicks
- Group dates into months: three clicks
- Transpose vertical to horizontal: one click

Both methods produce the same extract, which can be pasted into your final report, as shown in Figure 1.4.

However, using a pivot table to accomplish this task not only cuts down the number of actions by more than half, but also reduces the possibility of human error. Above that, using a pivot table enables for quick and easy shaping and formatting of the data.

What this example shows is that using a pivot table is not just about calculating and summarizing your data. Instead, pivot tables can often help you do a number of tasks faster and better than using conventional functions and formulas. For example, you can use pivot tables to instantly transpose large groups of data vertically or horizontally. You can use pivot tables to quickly find and count the unique values in your data. You can also use pivot tables to prepare your data to be used in charts.

The bottom line is that pivot tables can help you dramatically increase your efficiency and decrease errors on a number of tasks you may have to accomplish with Excel. Even though pivot tables cannot do everything for you, understanding how to use just the basics of pivot table functionality can take your data analysis and productivity to a new level.

**When Should You Use a Pivot Table?**

Large data sets, ever-changing impromptu data requests, and multilayered reporting are absolute productivity killers if you have to tackle them by hand. Doing hand-to-hand combat with one of these tasks is not only time consuming, but it also opens the possibility of
an untold number of errors in your analysis. So how do you recognize when to use a pivot table before it is too late?

Generally, a pivot table serves you well in any of the following situations:

- You need to find relationships and groupings within your data.
- You need to find a list of unique values for one field in your data.
- You need to find data trends using various time periods.
- You anticipate frequent requests for changes to your data analysis.
- You need to create subtotals that frequently include new additions.
- You need to organize your data into a format that is easy to chart.

**Anatomy of a Pivot Table**

Because the anatomy of a pivot table is what provides its flexibility and, ultimately, its functionality, truly understanding pivot tables is difficult without understanding their basic structure.

A pivot table is composed of the following four areas:

- Values area
- Row area
- Column area
- Filter area

The data you place in these areas defines both the utility and appearance of the pivot table. Keeping in mind that you will go through the process of creating a pivot table in the next chapter, let’s prepare by taking a closer look at the four areas and the functionality around them in the following sections.

**Values Area**

The *values area* is shown in Figure 1.5. It is a large rectangular area below and to the right of the headings. In this figure, you can see that the values area contains a sum of the revenue field.

![Figure 1.5](image-url)

The heart of the pivot table is the values area. This area typically includes a total of one or more numeric fields.
The values area is the area that calculates. The values area is required to have at least one field and one calculation of that field within this area. The data fields that you drop into the values area are those that you want to measure or calculate. The values area might include Sum of Revenue, Count of Units, and Average of Price.

It is also possible to have the same field dropped in the values area twice, but with different calculations. For example, a marketing manager might want to see Minimum of Price, Average Price, and Maximum of Price.

**Row Area**

The row area is shown in Figure 1.6. This area is composed of the headings that go down the left side of the pivot table.

```
<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
<td>E</td>
<td>F</td>
</tr>
<tr>
<td>3</td>
<td>REGION</td>
<td>(AB)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>REVENUE</td>
<td>MONTH</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>2500P</td>
<td>$33,073</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>3002C</td>
<td>$35,800</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>3002P</td>
<td>$39,258</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>400ST</td>
<td>$13,250</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>4500C</td>
<td>$109,197</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

Dropping a field into the row area displays the unique values from that field down the rows of the left side of the pivot table. The row area typically has at least one field, although it is possible to have no fields. Recall the example presented earlier in this chapter, in which you needed to produce a one-line report of credits. This report is an example of when there are no row fields in the row area.

The types of data fields that you drop into the row area include those that you want to group and categorize such as Products, Names, and Locations.

**Column Area**

The column area is composed of headings that stretch across the top of columns in the pivot table. For example, in the pivot table in Figure 1.7, the month field is in the column area.

```
<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>REGION</td>
<td>(AB)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>REVENUE</td>
<td>MONTH</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>SUM of REVENUE</td>
<td>MON</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>MODEL</td>
<td>January</td>
<td>February</td>
<td>March</td>
<td>April</td>
</tr>
<tr>
<td>5</td>
<td>2500P</td>
<td>$33,073</td>
<td>$29,104</td>
<td>$25,612</td>
<td>$22,538</td>
</tr>
<tr>
<td>6</td>
<td>3002C</td>
<td>$35,800</td>
<td>$31,574</td>
<td>$27,785</td>
<td>$24,451</td>
</tr>
<tr>
<td>7</td>
<td>3002P</td>
<td>$39,258</td>
<td>$39,427</td>
<td>$39,884</td>
<td>$39,508</td>
</tr>
<tr>
<td>8</td>
<td>400ST</td>
<td>$13,250</td>
<td>$11,690</td>
<td>$10,261</td>
<td>$9,030</td>
</tr>
<tr>
<td>9</td>
<td>4500C</td>
<td>$109,197</td>
<td>$88,173</td>
<td>$77,593</td>
<td>$68,281</td>
</tr>
</tbody>
</table>
```
Dropping fields into the column area displays your items in column-oriented perspective. The column area is ideal to show trending over time. The types of data fields that you drop into the column area include those you want to trend or show side by side such as Months, Periods, and Years.

**Report Filter Area**

The *Report Filter area* is an optional set of one or more drop-downs located at the top of the pivot table. In Figure 1.8, the filter area contains the Region field. In this case, the pivot table is set to show all regions.

![Figure 1.8](image)

Filter fields are great for quickly filtering a report. The Region drop-down in Cell B1 allows you to print this report for one particular region manager.

Dropping fields into the filter area allows you to filter the data items in your fields. Even though the filter area is optional, it comes in handy when you need to filter results dynamically. The types of data fields that you drop into the filter area include those that you want to isolate and focus on such as Regions, Line of Business, and Employees.

**Pivot Tables Behind the Scenes**

It is important to understand that pivot tables come with a few file space and memory implications for your system. To get a better idea of what this means, let’s look at what happens behind the scenes when you create a pivot table.

When you initiate the creation of a pivot table report, Excel takes a snapshot of your data set and stores it in a *pivot cache*. A pivot cache is nothing more than a special memory subsystem in which your data source is duplicated for quick access. Although the pivot cache is not a physical object that you can see, you can think of it as a container that stores the snapshot of the data source.

---

**CAUTION**

Any changes you make to your data source are not picked up by your pivot table report until you take another snapshot of the data source or "refresh" the pivot cache. Refreshing is easy; you simply right-click the pivot table and then click Refresh Data. You can also select the large Refresh button on the Options tab.
Each pivot table report you create from a separate data source creates its own pivot cache, which increases your memory usage and file size. The increase in memory usage and file size depends on the size of the original data source that is being duplicated to create the pivot cache.

Your pivot table report is essentially a view that gets its data solely from the pivot cache. This means that your pivot table report and your data source are disconnected.

The benefit of working against the pivot cache and not your original data source is optimization. Any changes you make to the pivot table report, such as rearranging fields, adding new fields, or hiding items, are made rapidly and with minimal overhead.

Limitations of Pivot Table Reports

Before discussing the limitations of pivot table reports, it is important to note that beginning with Excel 2007, Microsoft introduced a dramatic increase in the number of rows and columns allowed in one worksheet. However, increasing limits had a ripple effect on several of the tools and functions in Excel, which forced limitation increases in many areas including pivot tables.

Table 1.1 highlights the changes in pivot table limits from Excel 2000 to Excel 2010. Whereas some of these limitations remain constant, others are highly dependent on available system memory.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Row Fields</td>
<td>Limited by available memory</td>
<td>Limited by available memory</td>
<td>1,048,576 (Might be limited by available memory)</td>
</tr>
<tr>
<td>Number of Column Fields</td>
<td>256</td>
<td>256</td>
<td>16,384</td>
</tr>
<tr>
<td>Number of Page Fields</td>
<td>256</td>
<td>256</td>
<td>16,384</td>
</tr>
<tr>
<td>Number of Data Fields</td>
<td>256</td>
<td>256</td>
<td>16,384</td>
</tr>
<tr>
<td>Number of Unique Items in a Single Pivot Field</td>
<td>8,000</td>
<td>32,500</td>
<td>1,048,576 (Might be limited by available memory)</td>
</tr>
<tr>
<td>Number of Calculated Items</td>
<td>Limited by available memory</td>
<td>Limited by available memory</td>
<td>Limited by available memory</td>
</tr>
<tr>
<td>Number of Pivot Table Reports on One Worksheet</td>
<td>Limited by available memory</td>
<td>Limited by available memory</td>
<td>Limited by available memory</td>
</tr>
</tbody>
</table>
A Word About Compatibility

If you are working in an environment where legacy versions of Excel are still being used, you should be aware of the compatibility issues between legacy versions of Excel and Excel 2010. As you can imagine, the extraordinary increases in pivot table limitations lead to some serious compatibility questions. For instance, what if you create a pivot table that contains more than 256 column fields and more than 32,500 unique data items? How are users with legacy versions of Excel affected? Fortunately, Excel comes with some precautionary measures that can help you avoid compatibility issues.

The first precautionary measure is Compatibility mode, which is a state that Excel automatically enters when opening an .xls file. When Excel is in Compatibility mode, it artificially takes on the limitations of legacy versions of Excel. For example, while you are working with an .xls file, you cannot exceed any of the Excel 2003 pivot table limitations shown in Table 1.1. This effectively prevents you from unwittingly creating a pivot table that is not compatible with legacy versions of Excel. If you want to get out of Compatibility mode, you have to save the .xls file as one of Excel’s new file formats, which are .xlsx or .xlsm.

CAUTION

Beware of the Convert option found under Info section of the File menu. Although this command is designed to convert a file from Excel 2003 to Excel 2010, it actually deletes the Excel 2003 copy of the file.

The second precautionary measure is Excel’s Compatibility Checker. The Compatibility Checker is a built-in tool that checks for any compatibility issues when you try to save an Excel workbook as an .xls file. For example, if your pivot table exceeds the bounds of Excel 2003 limitations, the Compatibility Checker alerts you with a dialog box similar to the one shown in Figure 1.9.

Figure 1.9
The Compatibility Checker alerts you of any compatibility issues before you save to a legacy version of Excel.
With this dialog box, Excel gives you the option to save your pivot data as hard values in the new .xls file. If you choose to do so, the data from your pivot table is saved as hard values, but the pivot table object and the pivot cache are lost.

For information on Excel’s compatibility tools, pick up Que Publishing’s Excel 2010 In Depth (ISBN 978-0789743084) by Bill Jelen.

**Next Steps**

In the next chapter, you learn how to prepare your data to be used by a pivot table. Chapter 2, “Creating a Basic Pivot Table,” also walks through creating your first pivot table report using the Pivot Table Wizard.
Symbols

% of option, 74
% Running Total In option, 70-71

A

activating
PivotChart wizard, 155
PivotTable wizard, 155

ActiveX controls versus form controls, 237

adding
calculated fields
with formulas, 108-109
manual method, 108
fields to pivot table, 29-32
grand total row, 60
layers to pivot table, 32
macro functionality with VBA, 238-242

add-ins, PowerPivot
combination layouts, 228-229
free cost of, 198-199
installing, 200
limitations of, 200
report formatting, 228-231
slicers, 211-212
usage guidelines, 212-213

alternatives to pivot charts, 138-142

analyzing
data sources, 25
multiple consolidation ranges

analyzing activity by market, case study, 38-39

applying
Autofilter, 322-323
conditional formatting, 147
data visualizations with VBA, 309-310
multiple number formats, 326-328
numeric format, 48-49
table styles, 47
table styles with VBA, 307-308
themes, 62

areas section
drop-down arrows, 88-89
Report Filter area, 101-105

asymmetric reporting, 228

Autofilter, applying, 322-323
automatically refreshing pivot tables, 310-312
AutoShow method (VBA), 290-292
Autosort, 93
Average function, 64

B

benefits of PowerPivot, 1
95-198

blank cells
filling in, 25
filling in data area with VBA, 261
incorrect count calculations, troubleshooting, 63-64
replacing with zeros, 49-50

browsers, viewing pivot tables with, 181-183

building
pivot tables with external data sources, 161-168
Microsoft Access data, 162-165
SQL Server data, 165-168
PowerPivot reports, 201-212
calculated columns, adding with DAX, 208-209
copying and pasting data, 205-206
defining relationships, 207-208
linking data, 206
text file, importing, 201-204

buttons, pivot field buttons, 132

C

calculated columns, DAX, 214-218
calculated fields, 107-108
adding, manual method, 108
creating, 109-112
creating with VBA, 284
forecasts, summarizing, 114-118
inserting, 109-110
rules for, 124-125
calculated items, 107-108
creating, 118-122
generating with VBA, 285-286
rules for, 125
solve order, changing, 127
calculating percent of parent items, 71
Calculation options (VBA), 288-289
calculations
  Calculation options (VBA), 288-289
  constants, 123
deleting, 126
  order of operator precedence, 122-123
  Show Values As options, 67-68
  specifying with VBA, 280-282
case studies
  analyzing activity by market, 38-39
  converting pivot tables to values, 55-56
  forecasts, summarizing, 114-118
GETPIVOTDATA function, 75-78
invoice frequency and revenue distribution report, creating, 136-140
order lead time reports, creating, 85
pivot tables, synchronizing with combo box, 242-246
Top 10 reports, creating, 100-101
changing
  field names, 50-51
  themes, 62
charts
  pivot charts, 129-130
  alternatives to using, 142-147
  creating, 130-133
  slicers, 133
  standard charts, creating from pivot tables, 141-142
Clear command, 43
collapsing fields, 52-53
Collie, Rob, 336
column area, 15-16
Column field of multiple consolidation ranges, analyzing, 160
Column Labels drop zone, 30
columns, deleting empty columns, 24
combination layouts (PowerPivot), 228-229
combo boxes, pivot table synchronization, case study, 242-246
commands, Clear, 43
Compact layout, 52-53
comparing ActiveX controls and form controls, 237
compatibility
  between Excel 2007 and Excel 2010, 170
  slicers, 170-171
  Excel 2010 Compatibility mode, 173
  with legacy Excel versions, 18-19
  parent item calculations, 171-173
  VBA, Excel 2010 and older versions, 254
Comptability Checker, 18-19
conceptual filters, 298-300
conditional formatting, 145-151
preprogrammed scenarios, 146-147
connecting
  to OLAP cube, 186-188
  slicers to pivot tables, 36-37
constants, 123
controlling
  grand totals, 57-58
  subtotals, 57-58
  totals with VBA, 262-263
converting
  pivot tables to cube formulas, 193-195
  pivot tables to hard data, 313-314
  pivot tables to values, 55-56
  with VBA, 263-266
Count Distinct formula, generating with VBA, 282-283
Count function, 64
Count Nums function, 64
Create PivotTable dialog box, 27-28
creating
  calculated fields, 109-112
  calculated items, 118-122
  offline cubes (OLAP), 190-193
  pivot charts, 130-133
  report filters in VBA, 294-297
  Top 10 reports, 100-101
cubes (OLAP)
  connecting to, 186-188
  functions, 193-195
  offline, creating, 190-193
  structure of, 188-189
custom lists, sorting, 95-96
customizing styles, 60-61

data area
  blank cells, filling with VBA, 261
  fields, adding with VBA, 258
Data Field Settings dialog box, 51

data fields
handling multiple with VBA, 279-280

data sets
exploding to different tabs, 330-331
to different workbooks, 331-333
transposing, 323-327
data sources
analyzing, 25
external, building pivot tables with, 161-168
OLAP, limitations of, 190
summarizing with multiple consolidation ranges, 154-159
data visualizations, applying with VBA, 309-310
databases, OLAP, 183-186
cube, connecting to, 186-188
cube, structure of, 188-189
named sets, filtering with, 304-306
offline cubes, creating, 190-193
pivot table restrictions, 190
date fields, grouping, 80-83
DAX
calculated columns, calculations, 214-218
measures, creating, 218-225
Time Intelligence functions, 225-228
default style, selecting, 61
deferring layout updates, 42-43
deleting calculations, 126
Design tab (Layout Group), 52
dialog boxes
Data Field Settings, 51
Insert Calculated Field, 111
Label Filter dialog box, 98
Move Chart, 131
Move PivotTable, 43-44
New Formatting Rule, 148-150
Record Macro, 234
Solve Order, 127

Difference From option, 72
dimensions (OLAP), 188
disabling GetPivotData, 336-341
disparate data sources, summarizing with multiple consolidation ranges, 154-159
displaying revenue by category with VBA, 266-278
distributing pictures of pivot charts, 142
docking PivotTable Field List, 86
documenting formulas, 127-128
drag-and-drop functionality, activating, 33
drop zones, 29-30
rearranging, 32-34
drop-down arrows (areas section), 88-89

effective tabular design, 24-26
editing calculations, 126
empty cells, filling, 314-316
empty columns, deleting, 24
enabling drag-and-drop functionality, 33
END WITH statement (VBA), 253
Excel 2007
slicers, compatibility with Office 2010, 170-171
VBA, new methods introduced with, 254-255
Excel 2010 Compatibility mode, 173
Excel Services
goals of, 179
limitations of, 180
preparing spreadsheets for, 177
rendering spreadsheets, requirements, 176
spreadsheets, publishing, 177-179
executive overviews, generating with VBA, 290-292
exploding data sets
to different tabs, 330-331
to different workbooks, 331-333
external data sources, building pivot tables with, 161-168
Microsoft Access data, 162-165
SQL Server data, 165-168
Field List drop-down, sorting with, 92-93
field names, changing, 50-51
fields
adding to data area with VBA, 258
adding to pivot table, 29-32
adding to Report Filter area, 102
calculated fields, 107-108
adding, 107-108
creating, 111-114
collapsing, 52-53
data fields, handling multiple with VBA, 279-280
date fields, grouping, 80-83
grouping by week, 82-83
rank number, adding to pivot tables, 316-318
text fields, grouping, 86-87
ungrouping, 85

How can we make this index more useful? Email us at indexes@quepublishing.com
Fields drop-down (PivotTable Field List), 89-90
filing in blank cells, 25, 314-316
filtering
with conceptual filters, 298-300
in Label areas, 97-100
with named sets (VBA), 304-306
PivotFields with VBA, 298
with Report Filter area, 101-105
with search filter (VBA), 301-302
filters
slicers, 35-37
Top 10, case study, 100-101
flattened pivot tables, 228
forecasts, summarizing, 114-118
form controls, creating macro user interface, 236-238
formatting
conditional formatting, 145-151
preprogrammed scenarios, 146-147
multiple number formats, applying, 326-328
numeric format, applying, 48-49
pivot charts, restrictions, 135-136
pivot tables with VBA, 258-260
preparing data for pivot table reports, 24
formulas
calculated fields, adding, 108-109
cube formulas, converting pivot tables to, 193-195
documenting, 127-128
free cost of PowerPivot add-in, reasons for, 198-199
frequency distributions, generating, 328-330
functions
cube functions, 193-195
DAX, 214-218
Time Intelligence functions, 225-228
GetPivotData function
case study, 75-78
disabling, 336-341
shell reports, populating, 347-351
goals of Excel Services, 179
grand totals, controlling, 57-58
grouping
date fields, 80-83
years, including, 81-82
fields by week, 82-83
numeric fields, 85
text fields, 86-87
groups, calculating with VBA, 286-287
handling multiple data fields with VBA, 279-280
hard-coded values
converting pivot tables to, 313-314
creating from pivot tables, 141-142
hierarchies (OLAP), 189
incorrect count calculations, troubleshooting, 64
Index option, 74-75
Insert Calculated Field dialog box, 119-120
inserting calculated fields, 109-110
installing PowerPivot, 200
invoice frequency and revenue distribution reports, creating, 136-140
label areas, filtering, 97-100
Label Filter dialog box, 98
layers, adding to pivot table, 32
Layout Group, 52
layouts
Compact layout, 52-53
modifying with VBA, 308-309
Outline Form layout, 53-54
Tabular layout, 54-55
updates, deferring, 42-43
legacy Excel versions
compatibility issues, 18-19
parent item calculations, compatibility issues, 171-173
PivotTable toolbar, finding commands, 356-361
VBA, compatibility with Excel 2010, 254
levels (OLAP), 189
limitations
of Excel Services, 180
of OLAP pivot tables, 190
of pivot charts, 135-136
of pivot table calculations, 122-125
of pivot table reports, 17
of PowerPivot, 200
linked pivot table cells as source data, 142-144
linking pivot tables to pivot cache, 41
locating commands on legacy PivotTable toolbar, 356-361

M
macros, 231
functionality, adding with VBA, 238-242
recording, 234-236
security issues, 235-236
user interface, creating with form controls, 236-238

manipulating pivot reports with VBA, 261-262
manual sorting, 93-95
Max function, 64
measures (OLAP), 183
creating with DAX, 218-225
members (OLAP), 189
memory
limitations of pivot table reports, 17
pivot cache, 16-17
methods (VBA)
AutoShow, 290-292
in Excel 2007, 254-255
ShowDetail, 292-294
Microsoft Access data, building pivot tables with, 162-165
Min function, 64
modifying layout with VBA, 308-309
Move Chart dialog box, 131
moving pivot tables, 43-44
multiple consolidation ranges
Column field, analyzing, 160
disparate data sources, summarizing, 154-159
Pages field, analyzing, 161
Row field, analyzing, 160
Value field, analyzing, 160
multiple data fields, handling with VBA, 279-280
multiple number formats, applying, 326-328
multiple subtotals, adding, 66

N
named sets
accessing for asymmetric reporting, 228
OLAP pivot tables, filtering with, 304-306
New Formatting Rule dialog box, 148-150
numeric fields, grouping, 85
numeric format, applying, 48-49
object variables (VBA), 252-253
Office Web Apps (Excel 2003), saving pivot tables to the web, 173-174
offline cubes (OLAP), creating, 190-193
OLAP (Online Analytical Processing), 183-186
cubes
connecting to, 186-188
functions, 193-195
structure of, 188-189
named sets, filtering with, 304-306
pivot tables, limitation of, 190
operators, order of precedence, 122-123
order lead time reports
creation, case study, 84
Pages field of multiple consolidation ranges, analyzing, 161
parent item calculations in legacy Excel versions, 171-173
percent of parent items, calculating, 74
pictures of pivot charts, distributing, 142
pivot cache, 16-17
sharing, 40-41
updating, 39-40
pivot charts, 127-128
alternatives to using, 140-144
creating, 130-133
rules, 133-136
slicers, 133
pivot field buttons, 132
pivot reports, manipulating with VBA, 261-262
pivot tables
building with VBA, 256-260
converting to values with VBA, 263-266
flattened, 228
formatting with VBA, 258-260
publishing, 175-176
PivotChart wizard, activating, 155
PivotFields, filtering in VBA, 298
PivotTable Field List
docking/undocking, 86
Fields drop-down, 89-90
rearranging, 87-88

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PivotTable toolbar (legacy Excel versions), finding commands, 356-361
PivotTable wizard, activating, 155
placement of pivot charts, restrictions, 135-136
populating shell reports with GetPivotData, 347-351
PowerPivot
   benefits of, 195-198
   combination layouts, 228-229
   external data sources, SQL
      Server data, 231
   installing, 200
   limitations of, 200
   refreshing, 231
   report formatting, 228-231
   reports, building, 201-212
   Server version, 199-200
   slicers, 211-212
   usage guidelines, 212-213
preparing
   data for pivot table reports
      empty columns, deleting, 24
      formatting, 24
      tabular layouts, 22
   spreadsheets for Excel Services, 177
preprogrammed scenarios
   for conditional formatting, 144-145
Product function, 64
properties (VBA) in Excel 2007, 255
publishing
   pivot tables, 175-176
   spreadsheets to Excel Services, 177-179
rearranging pivot tables, 32-34
rearranging PivotTable Field List, 91
Record Macro dialog box, 234
redefining pivot tables, 161
reducing size of reports, 318-320
referencing totals, 124
refreshing
   data, 39-40
   multiple pivot tables in a workbook, 312
   pivot tables, 310-312
   PowerPivot, 231
RELATED() function,
   basing column calculations on another table, 216-218
relocating pivot tables, 43-44
removing subtotals, 65-66
rendering spreadsheets with Excel Services, requirements, 176
replacing blank cells with zeros, 49-50
Report Filter area, 16
   filtering with, 101-105
   slicers, 104-105
Report Filter drop zone, 30
report filters
   creating, 34
   VBA, creating, 294-297
reports
   PowerPivot, building, 201-212
   calculated columns, adding with DAX, 208-209
   copying and pasting data, 205-206
   defining relationships, 207-208
   linking data, 206
   text file, importing, 201-204
   reducing size of, 318-320
requirements for rendering spreadsheets with Excel Services, 176
restrictions
   of Excel Services, 180
   of OLAP pivot tables, 190
   of pivot charts, 135-136
   of pivot table calculations, 122-125
revenue, displaying by category with VBA, 266-278
row area, 15
Row field of multiple consolidation ranges, analyzing, 160
Row Labels drop zone, 30
rules for pivot charts, 133-136
Running Total In option, 70
S
Save As HTML option,
   saving pivot tables to the web, 174-176
saving pivot tables to the web
   Office Web Apps
      (Excel 2003), 173-174
   Save As HTML option, 174-176
search filter (VBA), 301-302
security, macros, 235-236
selecting
   default styles, 64
   items from Report Filters, 102-104
setting up
   custom lists, 95-96
   trusted locations, 235-236
sharing
   pivot cache, 40-41
   pivot tables with other
      Office versions, 168-170, 173
shell reports
   building, 345-346
   populating with GetPivotData, 347-351
Q-R
rank number field, adding to pivot tables, 316-318
ranking options, 72-74
Show Values As options, 67-68
  % of,
  Difference From, 72
  Index, 74-75
  Rank, 72-74
  Running Total In, 70
ShowDetail method (VBA), 292-294
side effects of pivot cache
sharing, 41
SkyDrive, viewing pivot
tables with, 181-183
slicers, 35-37, 104-105
  in Excel 2007, 170-171
  generating with VBA,
  302-304
  in pivot charts, 133
  in PowerPivot, 211-212
Solve Order dialog box, 127
solve order of calculated
items, changing, 127
sorting
  with Autosort, 93
  custom lists, 95-96
  with Field List drop-down,
  92-93
  manual sorting, 93-95
  with sort icons, 91-92
  in unique order, 312-313
source data, linked pivot
table cells as, 142-144
specifying
  calculation with VBA,
  280-282
spreadsheets
  preparing for Excel Services,
  177
  publishing to Excel Services,
  177-179
SQL Server data
  building pivot tables with,
  165-168
  for PowerPivot, 231
standard charts, creating
  from pivot tables, 141-142
StdDev function, 64
StdDevP function, 64
structure of OLAP cubes,
  188-189
styles
  customizing, 60-61
  default, selecting, 61
Styles gallery, 58-60
subtotals
  adding multiple, 66
  controlling, 57-58
  removing, 65-66
Sum function, 64
summarizing
  disparate data sources with
  multiple consolidation
  ranges, 154-159
  forecasts, 114-118
summary calculations,
  changing, 63-64
suppressing subtotals, 65-66
synchronizing subtotals
  with one combo box, case
  study, 242-246
unavailable features in legacy
pivot tables, 172
undocking PivotTable Field
List, 86
ungrouping fields, 85
unique order sorts,
  performing, 312-313
updating pivot cache, 39-40
user interface for macros,
  creating with form controls,
  236-238
Value field of multiple
consolidation ranges,
  analyzing, 160
values, converting pivot
tables to with VBA,
  263-266
values area, 14-15
  field names, changing, 50-51
Values drop zone, 30
Var function, 64
VarP function, 64
VBA (Visual Basic for
Applications)
  AutoShow method, 290-292
  calculated fields,
    generating, 284
  calculated items, generating,
    285-286
  Calculation options,
    288-289
  calculations, specifying,
    280-282
code writing techniques, END WITH statement, 253
conceptual filters, 298-300
Count Distinct formula, generating, 282-283
data area, filling blank cells, 261
data visualizations, applying, 309-310
fields, adding to data area, 258
groups, calculating, 286-287
layout, modifying, 308-309
legacy Excel versions, compatibility with Excel 2010, 254
macros, adding functionality, 238-242
methods introduced in Excel 2007, 254-255
multiple data fields, handling, 279-280
pivot reports, manipulating, 261-262
pivot tables
   building, 256-260
   formatting, 258-260
   PivotFields, filtering, 298
   report filters, creating, 294-297
revenue, displaying by category, 266-278
search filter, 301-302
ShowDetail method, 292-294
slicers, generating, 302-304
table styles, applying, 307-308
totals, controlling, 262-263
writing code, techniques
   END WITH statement, 253
   large data ranges, handling, 251-252
   object variables, 252-253
X-Y-Z
years, including in grouped date fields, 81-82
zeros, replacing blank cells with, 49-50

versions of Office, sharing pivot tables between, 168-170, 173
viewing pivot tables with web browser, 181-183