Exce Shir Shir Aviv

646.543.SHIR

info@excelshir.com http://excelshir.com

EXCELSHIR CHEAT SHEET: PIVOT TABLES

торіс	CONCEPT	DESCRIPTION
A 5 Basic Elements of Pivot Tables	1. Field List	Category of data (columns from data table).
	2. Row Labels	How to group your data (displayed vertically).
	3. Values	• Summarized data (SUM, AVG, COUNT, etc.) about a particular category.
	4. Column Labels	How to group your data (displayed horizontally).
	5. Report Filter	Selectively show/hide specific data in your Pivot Table.
B 5 Drawbacks of NOT Using Pivot Tables	1. Increase Chance of Errors	Humans make mistakes; computers only do if we give them bad instructions.
	2. Wasted Time	All other methods of data analysis require multiple time-consuming steps.
	3. Information Overload	Too much information hides the key takeaways and creates confusion.
	4. Difficult to Modify	Change is inevitable in today's world. Why not be ready for it?
	5. Tunnel Vision	• Wearing blinders may keep you on a track that you shouldn't be on in the 1st place.
C 5 Examples of When to Use Pivot Tables	1. Find Quick Answer to a Question	• Throw a Pivot Table together in less than 60 secs, delete when finished.
	2. Discover Hidden Trends	• Game-changing insights are buried inside your data. Dig them up with Pivot Tables.
	3. Create Reports	Perfect for single-use or recurring summaries of important information.
	4. Create Dashboards	Present all vital business metrics in one place & update them automatically.
	5. Impress the Pants off your Boss!	Mastery of Pivot Tables will give you instant "genius status." Trust me.
D 5 Key Benefits of Pivot Tables	1. Quick Setup Time	• 5 Simple steps to create your Pivot Table in under 5 min (see below).
	2. Powerful Analysis	Lookup, calculate, group, & summarize millions of rows of data in seconds.
	3. Relevant Data	• Deliver a clear, concise, and intuitive message that requires no explanation.
	4. Customizable	• Formatting & functionality tailor-made to suit your ever-changing business needs.
	5. No manual workever again!	 "Set it and forget it!" – Ron Popeil.
5 Steps to Creating a Pivot Table (SAGES)	1. Select Data	Choose the data you want to summarize, then insert a Pivot Table.
	2. Ask Questions	Ask specific questions about your data (Ex: Total sales in January in NYC?).
	3. G roup Data	• Drag field(s) into Row Labels to group your data in a logical manner.
	4. Experiment	Keep playing around until you find the answers to your questions.
	5. Show Pivot Table	Format your Pivot Table so it's clean, polished, and professional.

Additional Resources: http://excelshir.com/resources

