# Microsoft Excel: Session 5: Pivot Tables & Collaboration

Rich Malloy

# Subtotals

#### Review: The Subtotal Tool

*This is an old technique used to find totals or average for groups of data.*

1. Sort the data by the desired column(s) (e.g., Class and/or Category)
2. Click **Data > Subtotal**.
3. In the **At each change in** list box, choose the desired group column.
4. Choose the desired function (e.g., **Average**)
5. Select the field(s) to be calculated.
6. Repeat steps 2-5 for an additional grouping, but be sure to uncheck **Replace current subtotals**.
7. To remove the Subtotals, click **Data** > **Subtotals** > **Remove All**

# Excel Tables

#### Review: The Amazing “Excel Table”

Also known as: Formatted Table. Not only do Excel Table have nice formats, they also have special capabilities for managing data.

1. Click someplace inside the range of cells  
   (or, select whole range).
2. Click **Home > Format as Table**
3. Choose the desired Table Style
4. Verify table range and click OK
5. To remove filter buttons, click **Data > Filter**

#### Add a Total Row to an Excel Table

By adding a Total Row at the bottom of an Excel Table, you can sum, average, or perform many other functions on your data.

1. Click a cell in the Excel Table.
2. Click: **Table Tools** > **Design**
3. Check to box for: **Total Row**
4. Click any cell in the Total Row
5. Choose the desired function (e.g., **Sum**)

#### To convert a Table back to a Range:

This converts an Excel Table back to an ordinary range of cells, but preserves the formatting.

1. Select a cell in the table
2. Click **Table Tools Design >   
   Convert to range**
3. Clear formatting manually, if desired.

# Pivot Tables

#### The Amazing Pivot Table

This is a great way to compare groups and categories of data to see general trends. Note that in a Pivot Table, columns are called Fields.

1. Click any cell within a table of data.
2. Click **Insert** > **PivotTable**
3. In **Create PivotTable** dialog box, click **OK**.

A new worksheet will appear with a blank PivotTable on left and list of fields (columns) on right.

1. Drag the desired fields to either the **Columns** or **Rows** box.
2. Drag a numeric field such as Salary to the **Values** box.
3. Double-click the column header of the **Values** cells (e.g., “Sum of Salary”) to change the function from **Sum** to **Average** or **Count** or to change the **Number Format**.
4. To delete a field from the table, click and drag the field-name from the **Columns** or **Rows** box and drop it on the spreadsheet grid.
5. Click outside the PivotTable to hide the **Field** **List** on the right.

#### Fix the Column and Row Headers

The default column and row headers in a PivotTable are misleading. Here is a way to improve them:

1. Click any place in the PivotTable.
2. Click: **PivotTable Tools** > **Design**
3. Click: **Report Layout** > **Show in Outline Form**

#### Update a Pivot Table

Note: Unlike charts, Pivot Tables do not automatically update when their underlying data changes. You must remember to update a Pivot Table after you update the Pivot Table’s data. If you do not, the Table will show obsolete data.

1. Rt-click any cell in the PivotTable.
2. Choose **Refresh**

#### The Equally Amazing Pivot Chart

A great way to display data in a PivotChart.

1. Click any place in the PivotTable.
2. Click: **PivotTable Tools** > **Analyze**
3. Click: **PivotChart**
4. Choose the desired chart format.

#### Fix the PivotChart Labels

Use this technique to remove the Field Buttons on the PivotChart.

1. Click the chart to select it.
2. Click: **PivotChart Tools** > **Format**
3. Click the top half of the button: **Field** Buttons

# Nested Functions

Often one function is placed inside or nested in another function.

#### The ROUND Function

Quite often a function or formula is nested in a ROUND function. This function is useful for removing fractions of a penny that could cause accounting errors later.

1. Format: ROUND(number, digits).
2. Example: ROUND(45.78315, 3) 🡪 45.783

#### Nested IF Functions

An IF function can choose between two values. To choose between 3 values, place an IF function inside another IF function.

1. Format: IF(logical test 1, value 1, IF(logical test 2, value 2, value 3)).
2. Example: IF(C3=”CT”, 6.35%, IF(C3=”RI”, 7%,0))

# Collaboration

#### Insert a Note

1. Select a cell
2. Click: Review > New Note  
   Or, Rt-Click > Insert Note
3. Type note text
4. Click outside note to close it

#### Edit a Note

1. Rt-click cell > Edit Note
2. Edit the text of the note
3. Click outside the note

#### Delete a Note

1. Rt-click cell > Delete Note

#### Insert or Edit a Comment

*Comments are like notes except that people can respond to a comment and create a Threaded Comment.*

#### Insert a Text Box

1. Click: **Insert** > **Text** > **Text Box**
2. Draw the Text Box by clicking and dragging
3. Type the text of the Text Box
4. Click outside the Text Box

#### Save a file as a Template

1. Click: **File** > **Save as** > **Browse**
2. Change **Save as Type** to **Template**
3. Enter filename and click **Save**

#### Open a Template

1. Click: **File** > **New**
2. Click: **PERSONAL** (not: Personal)
3. Click the desired template

#### Hide or Unhide Worksheets

1. Right-click sheet tab
2. Choose: **Hide**

#### To Unhide a Worksheet:

1. Right-click any sheet tab
2. Choose: **Unhide**
3. Double-click the hidden worksheet

#### Protect Worksheets

##### Set cells as unprotected:

1. Select cells
2. Right-click a selected cell
3. Choose: **Format Cells …**
4. Click the tab **Protection**
5. Clear the check box for **Locked**
6. Click: OK

##### Protect a Worksheet

1. Click: **Review** > **Protect Sheet**
2. If desired, type a password
3. Click: **OK**

#### To Unprotect a Worksheet

1. Click: **Review** > **Unprotect** **Worksheet**
2. If required, enter the password

#### Excel Online

##### Access Excel Online

1. [www.office.com](http://www.office.com)
2. Click: Excel

##### Download an Excel Online file

1. Click: **File** > **Save As** > **Download** **a Copy**