PivotTable lab

To begin this lab you will need to open the **ComplianceTraining.xlsx** file and create a PivotTable.

1. Click the **Insert** tab on the Ribbon.
2. Click the **PivotTable** button.
3. Click **OK** in the Create PivotTable dialog box to accept the default settings and create the PivotTable.

Scenario 1: A manager wants to be able to see list of who has *not* completed the BPX training for each group within DEG. In addition to the names of the people who have not completed the training, she wants to see a count of them as well. (Hint, the BPX field will end up in more than one box in the Field List pane).

1. Select the following fields in the Field List:
   - Business Group
   - Group
   - Employee Name
   - BPX
2. Drag the Business Group field into the Report Filter box. On the PivotTable report, click the dropdown button and set the filter to DEG.
3. Drag the BPX field into the Report Filter box. On the PivotTable report, click the dropdown button and set the filter to No.
4. From the list of fields in the top half of the Field List, drag the BPX field down into the Values box.

Scenario 2: Now let's say that this manager wants to see the same information for ALL the business groups, not just DEG and she wants to be able to collapse the group data so she sees only a count of how many people in each business group have not completed the BPX training. Starting with the report you generated above….

1. Drag the Business Group field from the Report Filter box to the Row Labels box – into the first position at the top of that list.
2. On the PivotTable report, click the expand/collapse button to the left of the Business Group names to collapse the sub data.

Scenario 3: In a different scenario, Intel U is getting ready to schedule some additional BPX classes and needs to know how may people at each site have yet to complete the BPX training. Can you figure out how to create a PivotTable to help out Intel U?

1. First you need to reset the PivotTable. On the Options Contextual Command Tab on the Ribbon, click the Clear button and choose Clear All.
2. Select the following fields in the Field List:
   - Site
   - Employee Name
   - BPX
3. Drag the BPX field from the Row Labels box into the Report Filter box. On the PivotTable report, click the dropdown button and set the filter to No.
4. Drag the Employee Name field from the Row Labels box into the Values box to get a count of employees who meet the filter criteria.

PivotTables and Calculations

This sample file contains no numeric data. As a result, all the fields that you added automatically appeared in the Row Labels box at the bottom of the Field List pane. When you experiment with your own data, any numeric fields that you select will appear in the Values box rather than the Row Labels box. *Excel automatically places text-based fields in the Row Labels area and numeric fields in the Values area.*

In addition, any numeric data will be summed by default rather than counted. If you want to change how any field in the Values box is calculated, simply click the dropdown button for the field in that box and view the Field Settings… dialog box. There you can change the calculation that is performed on the field.

For more information about using Formulas with PivotTables, please refer to Excel 2007 Online Help under the topic: Overview of values, custom calculations, and formulas in a PivotTable or PivotChart report