Technical Bulletin: Pivot Table Tutorial

Residential New Construction Program

November's tech bulletin will provide instructions on how to generate a Pivot Table in MS Excel to analyze data about homes submitted to the DERNC incentive program. The bulletin will provide a step-by-step guide on how to set up a pivot table to return averages, counts, and sums.

Create a Pivot Table in Excel for Windows

1. Before creating a pivot table, create a table. To do this, select any cell within the data and press Ctrl + T. A "Create Table" dialog box will appear.
2. Ensure the range in the dialog box encompasses the entire data set and select OK.
3. To create the pivot table, locate and select the "PivotTable" dropdown button. This is found on the top ribbon under the "Insert" tab. A snippet of the pivot table drop down is to the right.
4. Select the "From Table/Range" option from the drop-down list.
5. The default placement of a Pivot table is on a new worksheet, but users have the option to specify their location by selected the "Existing Worksheet".
6. Select OK.
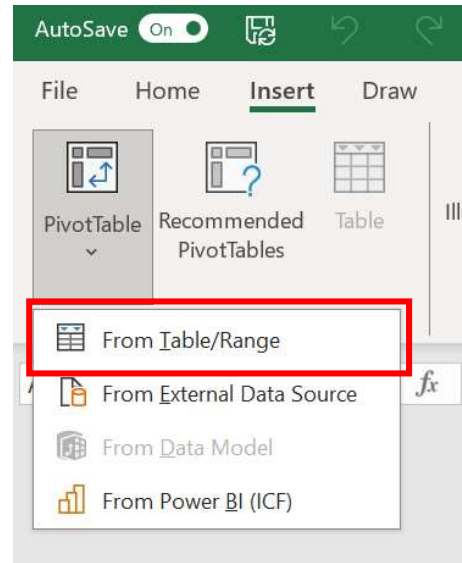
PivotTable dropdown location

Building out your Pivot Table

1. A blank pivot table should appear in the cells of the spreadsheet with the "PivotTables Fields" side panel to the right. At the top of the panel are the fields or columns from the data set. The bottom of the panel has four areas where the fields are placed to manipulate the pivot table. A description of the areas are as follows:
    a. Filter: Applies a filter to the pivot table.
    b. Columns: Adds a field to the columns of the pivot table.
    c. Rows: Adds a field to the rows of the pivot table.
    d. Values: Adds a field to the body of the pivot table. These fields will be summed, averaged, counted, etc.
2. To move a field from one area to another, drag the field to the target area (Filters, Columns, Rows, or Values).
3. To setup filters select fields by clicking and dragging to the desired field to the filter area and selecting the dropdown at the top of the pivot table in the spreadsheet.
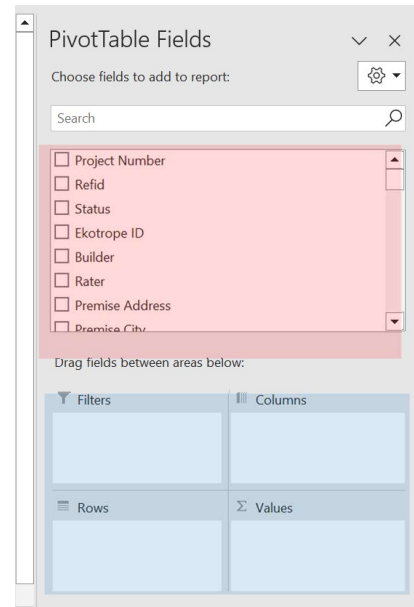
PivotTable Fields dialog box: The red shows the fields, and the blue shows the areas

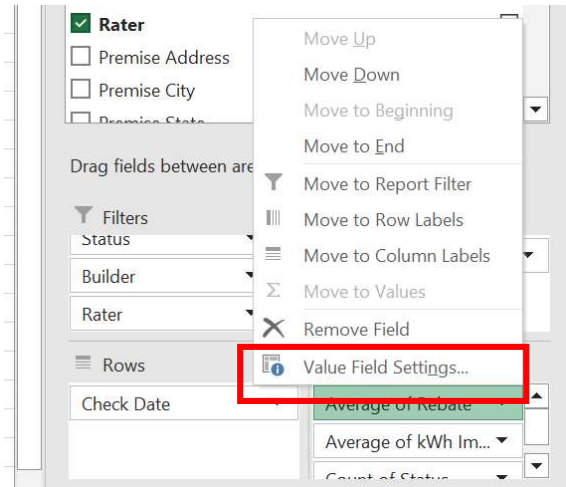# Technical Bulletin: Pivot Table Tutorial

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Summarize Values

- By default, Pivot Table fields in the Value area are summed or counted when the field is a number or text.
- You can change the default calculation by selecting the field in the Value area and then the "Value Field Settings" option. An example of this is to the right.
- Once selected a dialog box will appear with several options. For this example, the values are averaged. After selecting the option, select ok and the pivot table will update.
- Below is an example pivot table where the Status, Builder, and rater are filtered to find the average rebate, kWh Impact and number of applications.

Example of editing the value field Settings

Pivot Table Example

Please contact us at DERNC@icfprogram.com with questions or for additional information.