Pivot Tables Step-by-step instructions

Pivot tables are a really simple but effective way of displaying your complaints information, so you can quickly assess trends and produce quick charts and tables for reports.

For pivot tables to work properly you need to create a table, where you enter all your complaints information in a standardised way, each time complaints are received.

If your complaints are provided to you by a customer service team, it’s a good idea to set out your table in the same way in which the information is provided to you, so you can just copy and paste it in.

If you’re not used to using pivot tables it can be quite a daunting thought. The best way to get the most out of pivot tables is not be scared of it and just have a play with the information to see what it shows you – once you get used to them, it’s easy! If you’re scared of messing up your complaints data, create a copy of your file and then you can play with it, without being scared of losing any of your data.

An example table is shown below.

Once you have your standardised table that you’re going to use, you can then go ahead and create a pivot table and chart.
To do this select all the cells in your table. Make sure you select the rows below that do not currently contain any information – this way when you add more data in, the pivot will know to include it and you can ask it to do a quick refresh to pull the new information in.
Once you’ve got your area highlighted, go to ‘Insert’, then ‘Pivot Chart’ and choose ‘PivotChart & PivotTable’.

You may find that if you have an older version of Excel than I do, that this function is in the drop down lists at the top, rather than in the header images.

You’ll then get a pop up box called ‘CreatePivotTable’. It will ask you if you would like your pivot table and pivot chart on the same worksheet as your data, or on a new worksheet. I like to have them on a different sheet, as I find it easier to work with — but you can choose.

Then press ok.
Notice, all your table headings are now listed in the PivotChart Fields. You can now use these to build your table and your chart.

To build your table and your chart, you can drag your table headings into one of the 4 squares below called – Filters, Legend, Axis and Values.

Each time you drag a table heading into one these squares it will display them in the chart as follows:

Filters – places them at the top of the chart, so you can then filter the information shown in the chart using this heading.

Legend – this shows the data by colour coding it to each of the entries in that heading

Axis – any headings you put in here will show on the bottom of your chart (horizontally)

Values – this is where you tell the pivot to count the number of entries. It’s generally best to ask it to count the number of complaints here, so I would put in complaint type
You can put more than one heading in the axis square, so you can see the data split by each heading. Here’s an example.

![Excel Pivot Table Example](image-url)

- **Shift**, **Complaint Category** and **Production Line** are showing on the bottom of the chart.

- The product name is colour coded.

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In the example below I've added all the headings I need. I can now ‘play’ with the information.

You can filter the information in the chart where ever you see a little black drop down arrow, like on the ‘Customer’ heading. By clicking this you can pick to see ‘All’ or a particular customer.

You can do the same with the headings under the chart. Just remember if you click a specific customer for example, you’ll need to go back and click (All) when you’re done, otherwise it will only ever show you information just for that customer.
If you want to see the information displayed differently, you can now move the headings around in the squares. For example, I can move the ‘Customers’ heading from the filter area to the bottom of the table, so it will show the complaints by customer, as shown below.

Now you can see each of the customers in the table.
You can also change the order in which the information is displayed, so rather than it showing the complaints by customer at the top, we can order it by line first. To do this drag the customer heading to the top of the list in the Axis square, so that the production line is at the bottom.
When you have your pivot table set up the way you want it, you can then save the document. Then when you want to add more complaints information (as new complaints are received), you can add this into your original table. Once
you’re done though, you need to tell the pivot table and chart that there is new information that it needed to pull in. To do this just right click on the table and then choose ‘Refresh’. It will then pull in the new information.

Have you lost your PivotTable Fields boxes on the right?

Don’t worry – that’s because your cursor is not on the pivot table or pivot chart. Just click onto it and it should appear...