

# Microsoft Excel 2003: Functions and Data Analyses

## Part 2: PivotTable

INFORMATION TECHNOLOGY SERVICES  
California State University, Los Angeles

Version 2.2

Spring 2009

### Contents

<b>Scenario.....</b>	<b>2</b>
<b>Creating a PivotTable.....</b>	<b>2</b>
Creating a PivotTable Report.....	3
Adding PivotTable Report Fields .....	4
Selecting a Page Field Item.....	5
<b>Revising a PivotTable Report .....</b>	<b>5</b>
Refreshing a PivotTable Report.....	6
Changing the Summary Function .....	6
Adding New Fields to a PivotTable Report.....	7
Changing the Order of Data Fields .....	7
Working with Dates .....	7
Showing and Hiding Detail.....	8
Hiding/Displaying PivotTable Fields .....	9
Applying AutoFormats .....	9
<b>Creating a PivotChart Report .....</b>	<b>10</b>
Creating a PivotChart Report.....	10
Changing a Chart Type .....	11
Dragging Fields from the PivotTable Field List .....	11
Formatting a PivotChart.....	12
Displaying Data labels .....	13
<b>Saving and Publishing a PivotTable in HTML Format .....</b>	<b>13</b>
Saving and Publishing a PivotTable .....	13
Opening a PivotTable in the Web Browser .....	14
Sorting the Data Records .....	15
Showing and Hiding Details .....	16
Expanding and Collapsing Selections with Interactivity .....	16
Formatting a PivotTable Saved as a Webpage .....	17

---

## Introduction

A PivotTable, also called PivotTable Report, is a summary table which uses two dimensional data to create a three-dimensional table based on multiple conditions that have intersecting points. With just a few short steps, PivotTable can summarize large amounts of information in a small amount of space. The advantage of the PivotTable is its flexibility to view the details that make up the total number and its ease in performing numerous calculations without typing a formula. This handout is designed to teach how to create and revise a PivotTable report and a PivotChart Report as well as to publish a PivotTable in HTML Format.

---

## Scenario

Many companies and organizations use Excel to deal with numeric data and analyze it from a different prospective. A bank report is one of the examples which show how a dataset is analyzed based on multiple conditions. For instance, it is used to show the account balance, the account average balance, the number of accounts, and the open date of the accounts in each branch. Also, it seeks to compare the data between branches. In addition, the use of different kinds of graphs provided in Excel enhances the analysis of the data as well as its appearance. Therefore, this handout will demonstrate how the user can customize a bank report appropriate to the purpose, by employing the PivotTable or PivotChart wizard. Furthermore, it will help the user to understand how to perform numerous calculations with ease in the PivotTable and PivotChart.

The dataset of Part two includes several data fields such as bank branch, account type, customer type, and open date; which demonstrate the relevant data for a bank report. The bank branches include Central, Northwest, and Westside. There are three types of bank accounts which include the CD (Certificate of Deposit), Checking, and Saving Accounts. The dataset categorizes the customers into four types, such as Personal, Personal VIP, Corporate, and Corporate VIP depending on their current balance, average balance, and other factors affecting their credit for the past five years. In this dataset, the average balance and other factors will not be displayed for the users to simplify creating a PivotTable report. Also, the dataset shows only the open dates of accounts from 2001 to 2005, but the date items can be grouped by months, quarters, and years in the PivotTable and PivotChart Reports.

## Creating a PivotTable

A PivotTable Report is created using the **PivotChart Wizard** which walks the user through the step-by-step process.

## CREATING A PIVOTTABLE REPORT

To open the data file:




1. Select the **Start** menu ► **Microsoft Excel**.
2. Click the **Open** button  on the **Standard** toolbar. The *Open* dialog box appears.
3. In the *Open* dialog box, select the drive where the data file is stored in the **Look in:** list box. Double-click the file named “*PivotTable.xls.*”



Figure 1 - PivotTable & Chart Wizard (Step One of Three)

To create a PivotTable:

1. Place the cursor anywhere in the range of the database.
2. From the **Data** menu, select **PivotTable and PivotChart Report....** The *PivotTable and PivotChart Wizard – Step 1 of 3* dialog box opens (see Figure 1).
3. Select the  **Microsoft Office Excel list or database** option button, under **Where is the data that you want to analyze?**

4. Select  **PivotTable** under **What kind of report do you want to create?**
5. Click the **Next** button. The *PivotTable and PivotChart Wizard – Step 2 of 3* dialog box opens (see Figure 2).

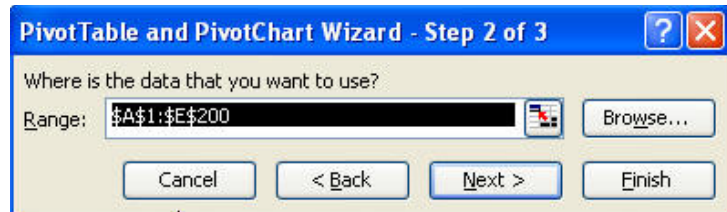



Figure 2 - Step Two of Three

6. The range of data is automatically given as; **\$A\$1:\$E\$200**. It resulted from the position of the cursor in the worksheet before starting the **PivotTable and PivotChart Wizard**. Otherwise, click on the edit box and select a range of data to use from **\$A\$1:\$E\$200**.



Figure 3 - Step Three of Three

7. Select the **Next** button. The *PivotTable and PivotChart Wizard – Step 3 of 3* dialog box opens (see Figure 3).
8. Select  **New worksheet** under **Where do you want to put the PivotTable report?**
9. Click the **Finish** button. “*Sheet1*” is automatically created (see Figure 4).

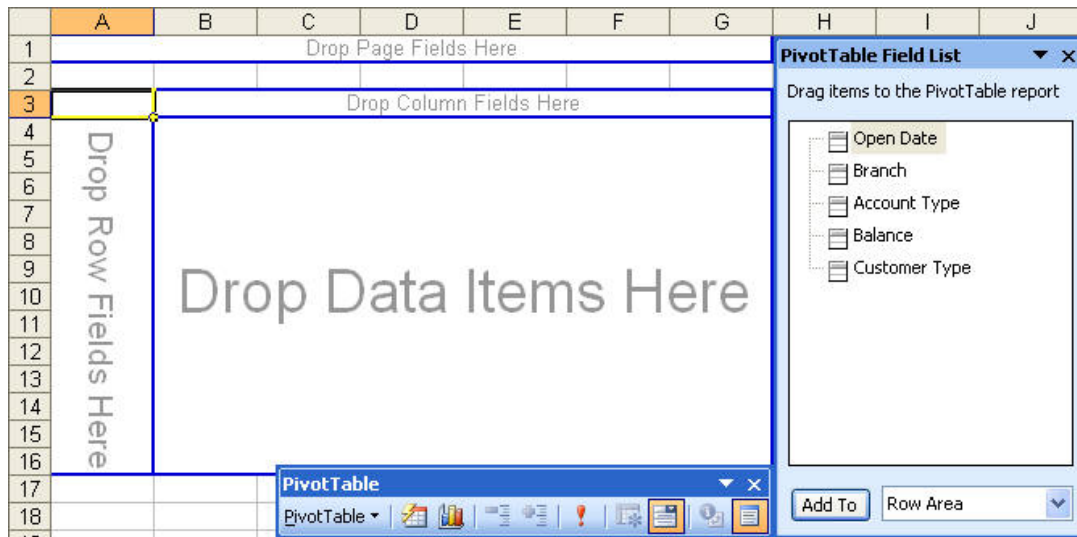


Figure 4 - Drag Data Items

### Adding PivotTable Report Fields

When the fields from the selected data appear on the right side of the screen, each field needs to be added into the PivotTable layout.

The following describes the four areas that are available for adding a field (see Figure 5):

1. **Page:** Creates a drop-down menu above the table to analyze a specific item from the field, such as a selected branch.
2. **Row:** Applies a vertical format to the table, summarizing the data from top down. The row drop area lists each item in the field down the left side of the PivotTable.
3. **Column:** Applies a horizontal format to the table, summarizing the data from left to right. The column drop area lists each item in the field across the top of the PivotTable.
4. **Data:** The data drop area is the summary of the numbers. This area adds, counts, or creates other analytical functions against the data dropped here.

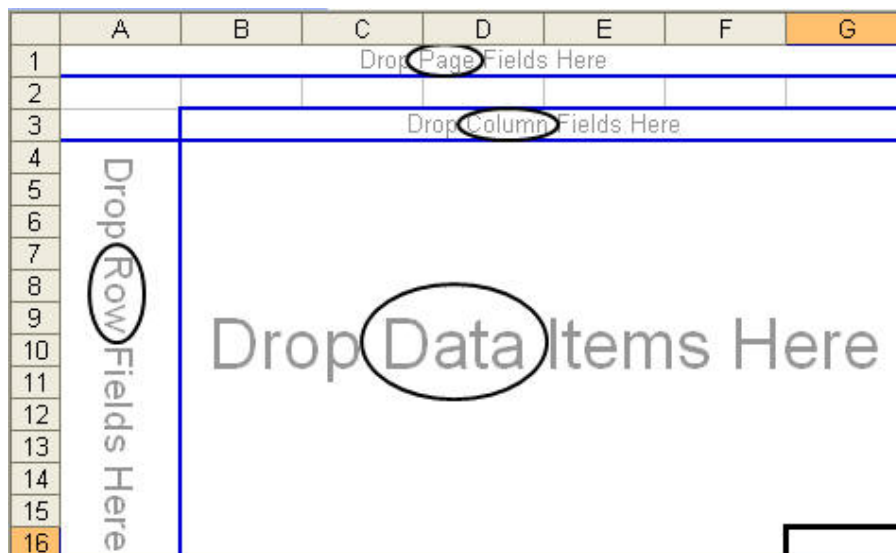


Figure 5 - Field Placement Areas

To add fields into the PivotTable layout under the *PivotTable Field List* dialog box:

1. Click the **Branch** field. Drag and drop it into the **Page** drop area.
2. Click the **Account Type** field. Drag and drop it into the **Row** drop area.

- Click the **Customer Type** field. Drag and drop it into the **Column** drop area.
- Click the **Balance** field. Drag and drop it into the **Data** drop area (see Figure 6).

Branch	(All)			
Sum of Balance	Customer Type			
Account Type	Corporate	Personal	Personal VIP	Grand Total
CD	976733	1187743.6	1601705.2	3766181.8
Checking	1236561.6	788870.8	570411.7	2595844.1
Saving	1517036.6	741513.13	1011282.9	3269832.63
Grand Total	3730331.2	2718127.53	3183399.8	9631858.53

Figure 6 - PivotTable Layout

- Double click on the worksheet tab **“Sheet1”** and rename it **“PivotTable”**.

### Selecting a Page Field Item

When each field is dropped in the drop zone, a user can customize a summary report by selecting one of the items in the pages field dropdown box.

To select a page field item:

- When the field data is dropped in the page drop area, the PivotTable Report displays a summary of all the data because *(All)* is selected by default (see Figure 7).
- To change a page field item, click the drop-down box and select **Northwest** (see Figure 8).
- Notice the PivotTable Report displays the summary of the Northwest branch data only (see Figure 9).

	A	B	C
1	Branch	(All)	
2			
3	Sum of Balance	Customer Type	
4	Account Type	Corporate	Personal
5	CD	976733	1187743.6
6	Checking	1236561.6	788870.8
7	Saving	1517036.6	741513.13
8	Grand Total	3730331.2	2718127.53

Figure 7 - Selecting a Page Field Item

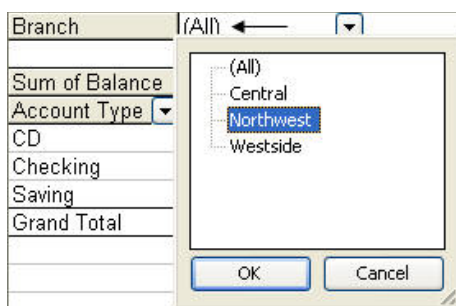


Figure 8 - Changing a Page Field Item

	A	B	C
1	Branch	Northwest	
2			
3	Sum of Balance	Customer Type	
4	Account Type	Corporate	Personal
5	CD	260726	391707.4
6	Checking	296595.2	139930.9
7	Saving	302815.1	290550.9
8	Grand Total	860136.3	822189.2

Figure 9 - Northwest Branch Displayed

### Revising a PivotTable Report

Once a PivotTable or PivotChart is created, the user can restructure the PivotTable or PivotChart by dragging and dropping fields, by using the options on the menus, or by using the PivotTable toolbar. Formatting options can also be used to change the look or structure of the PivotTable.

## REFRESHING A PIVOTTABLE REPORT

After a PivotTable is created, if some data in the original worksheet has changed, the PivotTable must be refreshed to automatically update the contents of the table.

To refresh a PivotTable Report:


1. Click on worksheet “*Data*.”
2. Click cell D3, as a **Checking** product opened in the **Northwest** branch.
3. Change the value of cell D3 to **1,000,000**.
4. Click worksheet “*PivotTable*.”
5. Display the **PivotTable** toolbar.
6. Click on the  icon on the toolbar (see Figure 10).
7. Notice that the PivotTable automatically refreshes the data.




Figure 10 - Refresh Button

## CHANGING THE SUMMARY FUNCTION

By default, PivotTable uses the sum function to summarize the data, but the user can change the summary method of a PivotTable or PivotChart data by using different summary functions.

To change the summary function:

1. In the PivotTable, click cell A3 in the data area.
2. On the PivotTable Toolbar, click the **Field Settings**  icon. The *PivotTable Field* dialog box appears (see Figure 11). Double-clicking cell A3 also brings up the *PivotTable Field* dialog box.
3. In the **Summarize by:** box, click the **Count** function to count the number of occurrences of each balance type.
4. Click **OK**.
5. Notice that the PivotTable displays the count of balance (see Figure 12).

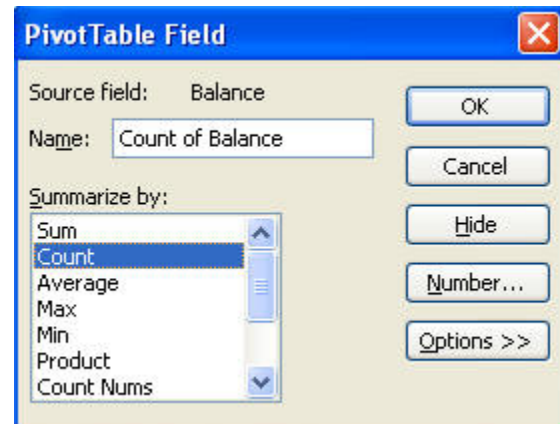


Figure 11 - Count Summary Function

NOTE: Another way of change the summary function is by double-clicking cell A3.

	A	B	C	D	E
1	Branch	(All) ▾			
2					
3	Count of Balance	Customer Type ▾			
4	Account Type ▾	Corporate	Personal	Personal VIP	Grand Total
5	CD	22	28	26	76
6	Checking	24	20	14	58
7	Saving	31	16	18	65
8	Grand Total	77	64	58	199

Figure 12 - Count Summary of Balance Function

## Adding New Fields to a PivotTable Report

New Fields can be added to the PivotTable to view other aspects of the bank balances.

To add a new field:

1. Open the worksheet “*pivot\_rev.*”
2. From the *PivotTable Field List* dialog box, click the **Open Date** field and drag it to the left of the **Account type** area (see Figure 14).

	A	B
1	Branch	(All)
2		
3	Count of Balance	Customer Type
4	Account Type	Corporate
5	CD	22
6	Checking	24
7	Saving	31
8	Grand Total	77

Figure 13 - Adding a New Field

	A	B	C
1	Branch	(All)	
2			
3	Count of Balance		Customer Type
4	Open Date	Account Type	Corporate
5	2005	CD	2
6		CD Sum	34266
7		Checking Sum	
8		Saving Sum	
9	Grand Total		2

Figure 14 - Open Date Field Added to PivotTable

NOTE: Different field items can only be placed in certain areas. See table for the list and description.

Table 1- PivotTable Field List Icons

Icon	Description of Icon
	Can only be used in the Row, Column, and Range field areas.
	Can only be used in the Data Range of the PivotTable.
	Can be used in any field area in the PivotTable.

## Changing the Order of Data Fields

To change the order of data fields:

1. Place the cursor in cell A4 and right-click.
2. Point to *Order* on the shortcut menu.
3. Select the *Move Right* option.
4. Notice that the *Open Date* field is moved to the right of the **Account Type** field.

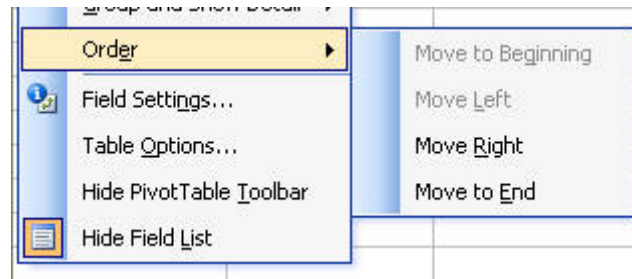


Figure 15 - Changing the Order of Data Fields

NOTE: As an alternative way, point the cursor on a data field cell. The pointer becomes a 4 headed arrow. Drag the data field to the desired position.

## WORKING WITH DATES

PivotTable enables numeric items, dates and times, and selected items to be grouped by a desired range. This section explains grouping by dates, but grouping other items can be applied in the same manner.

To group dates:

1. Place the mouse cursor in cell A4.
2. Right-click and select the Group... option under Group and show detail option. The *Grouping* dialog box appears (see Figure 16).
3. By default, the two dates, *Starting at:* and *Ending at:*, are automatically selected based on the field data (see Figure 17).
4. In the *By* box, select *Months*, *Quarters*, *Years* to group the dates in the data field area by month, quarter, and year (see Figure 18).
5. Notice the data fields are grouped by years, quarters, and months in separate columns.

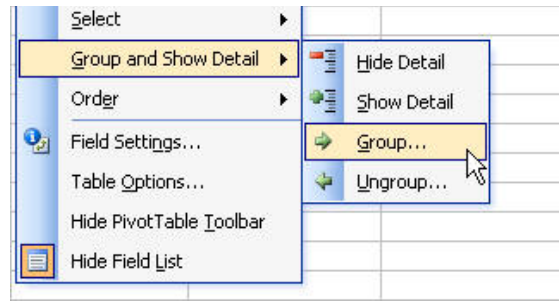


Figure 16 - Grouping By Dates

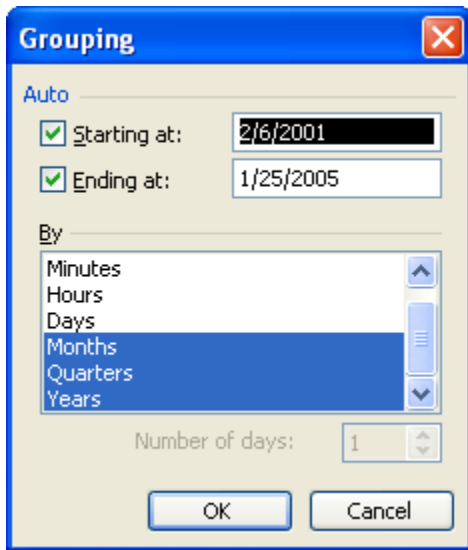


Figure 17 - Grouping Dialog Box

Branch	Northwest		
Count of Balance			
Years	Quarters	Open Date	Account Type
2001	Qtr1	Feb	Checking
		Feb Total	
	Qtr2	Mar	CD
		Mar Total	
	Qtr3	Apr	CD
		Apr Total	
	Qtr4	Sep	Checking
		Sep Total	
2002	Qtr1	Dec	Saving
		Dec Total	
	Qtr2	Mar	Saving
		Mar Total	
	Qtr3	May	Saving
		May Total	
	Qtr4	Jun	CD
		Jun Total	
	Aug	CD	
	Aug Total	Saving	
	Oct	CD	
	Oct Total		

Figure 18 - Grouped by Year

## Showing and Hiding Detail

In the PivotTable, users can show or hide details of the fields.

To hide details of the *Year* field:

1. Click the field's heading, cell A4.
2. Right-click and select Group and show Detail.
3. Select the Hide detail option (see Figure 19).

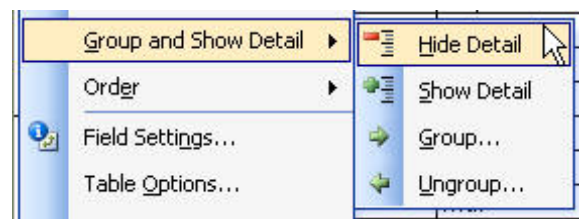


Figure 19 - Hiding Details

To show hidden details of the field:

1. Click the field's heading, cell A4.
2. Right-click and select Group and show Detail.
3. Select the Show detail option (see Figure 20).

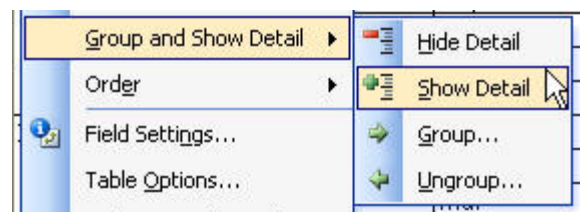


Figure 20 - Show Hidden Details

## Hiding/Displaying PivotTable Fields

PivotTables enable a particular data field to be hidden and redisplayed.

To hide the *Open Date* field in the PivotTable report:

1. Double click cell C4. The *PivotTable Field* dialog box appears.
2. Click on the **Hide** option (see Figure 21).
3. Notice that the *Open Date* field is hidden in the PivotTable report.

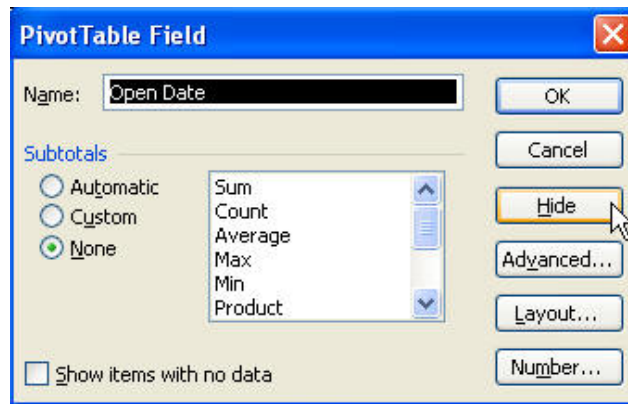


Figure 21 - Hiding PivotTable Fields

To redisplay the hidden field in the PivotTable report:

1. On the **PivotTable** toolbar, click on the *Show/Hide Field List* icon. The *PivotTable field list* dialog box appears (see Figure 22).
2. Double click the *Open Date* field.
3. Notice that the *Open Date* field now appears in the PivotTable report.

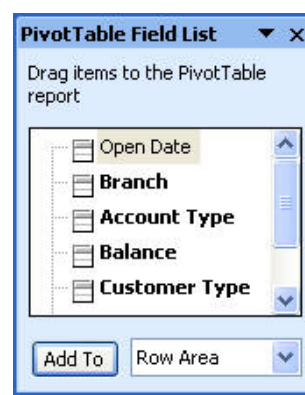
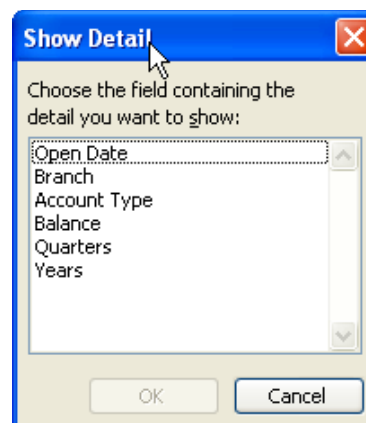


Figure 22 - Redisplaying the Hidden Field

**NOTE:** As an alternative way, click on the *Show Detail* icon on the **PivotTable** toolbar. The *Show Detail* dialog box appears. Then, double click the *Open Date* field.



## APPLYING AUTOFORMATS

In Excel, it is possible to manipulate and format a PivotTable, such as changing the font, point size, colors, etc. This section shows how Excel automatically applies a preset **AutoFormat** to a new PivotTable.

To apply AutoFormat to a PivotTable:

1. Place the cursor anywhere in the PivotTable report.
2. Click the **Format Report** button on the **PivotTable** toolbar.
3. Select one of the AutoFormats from the list (see Figure 23).
4. Click **OK**.

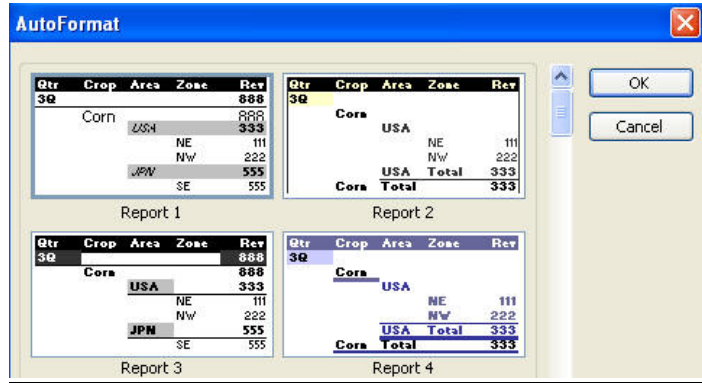


Figure 23 – AutoFormat Dialog Box

## Creating a PivotChart Report

A PivotChart Report provides interactive analysis of data, like a PivotTable Report. The display view of the data can easily be changed to see different level of details, and the organization of the chart layout can be changed by dragging fields and by showing or hiding items in fields.

There are several different types of data sources that can be used such as the list or table taken from an Excel list or range, an external database, or another PivotTable Report.

### CREATING A PIVOTCHART REPORT

To create a PivotChart Report using an existing PivotTable:

1. Open the file “*PivotChart.xls*” from the student data directory.
2. Select the worksheet “*PTable*”.
3. Place the cursor in the PivotTable area.
4. Click on the **Chart Wizard** icon on the **Standard** toolbar.
5. A PivotChart is created on a new worksheet, “*Chart1*” (see Figure 24).

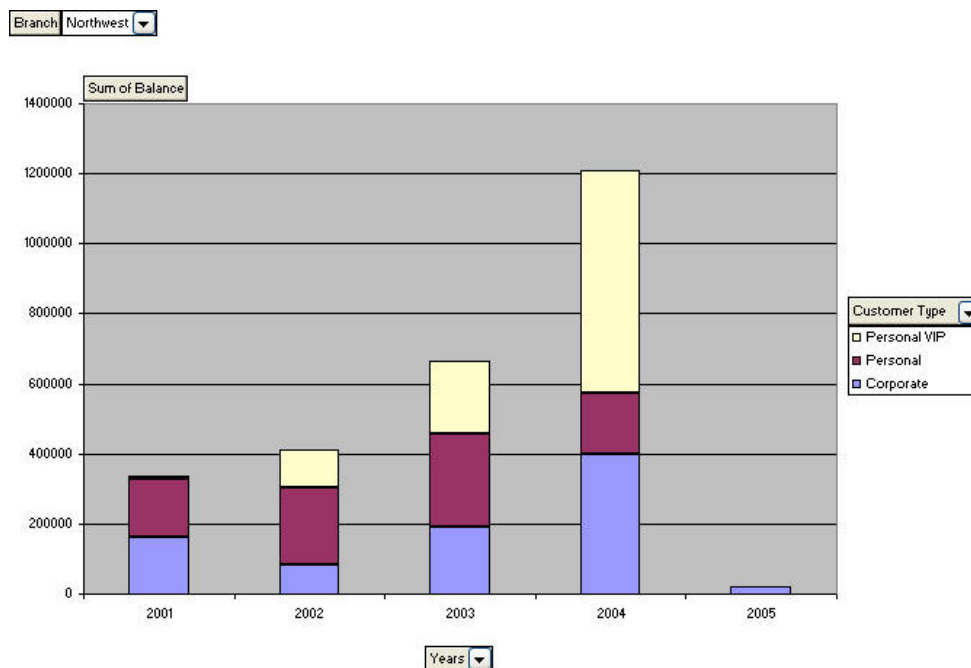




Figure 24 - PivotChart Report

## Changing a Chart Type

To change the chart type:

1. Select the **Chart** menu ► **Chart Type...** option. The *Chart Type* dialog box appears.
2. In **Chart type:**, select the **Bar**  option (see Figure 25).
3. In **Chart sub-type:**, select the clustered bar  option (the first column, the second row).
4. Click **OK**.

**NOTE:** To preview the chart click the **Press and Hold to View Sample** button.

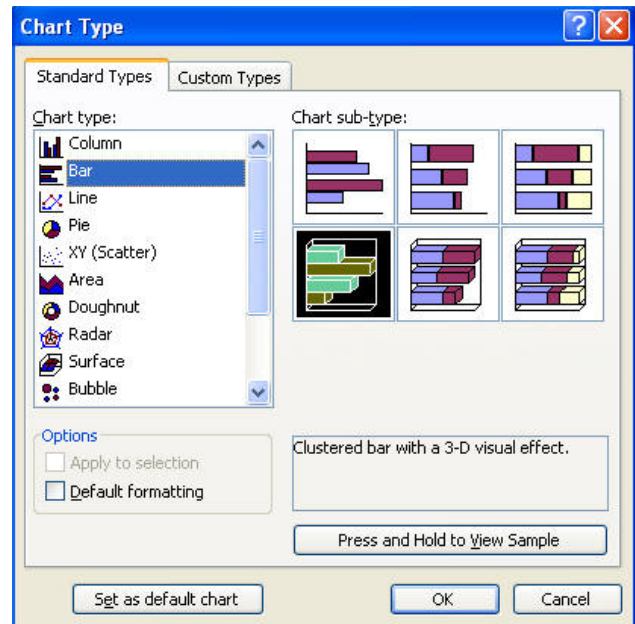



Figure 25 - Changing Chart Type

## Dragging Fields from the PivotTable Field List

A PivotChart offers the power of PivotTables and normal charts combined in one interactive medium. As the fields are dragged to new locations on the chart, Excel will pivot the chart to correspond to the new field location.

To drag fields from the PivotTable field list:

1. Select the Pivot table to display the **PivotTable** toolbar.
2. Click on the **Show Field list**  button.
3. Drag the *Account Type* field to the area next to the *Years* field at the bottom of the chart area (see Figure 26).

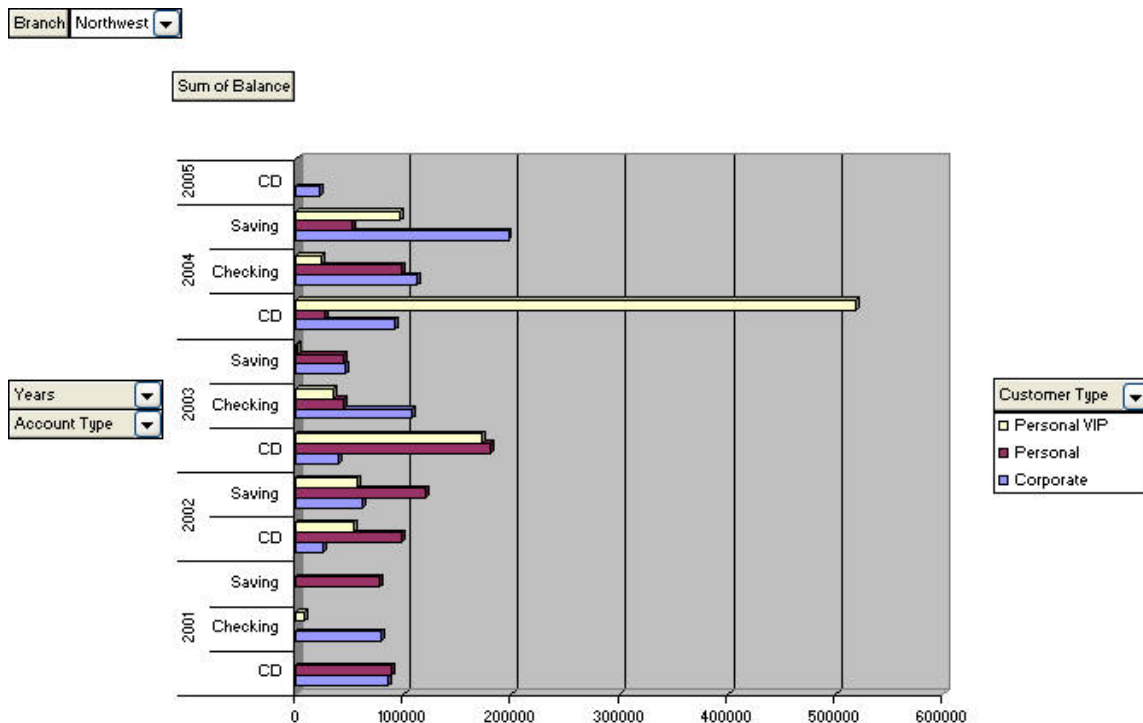


Figure 26 - Dragging Fields to PivotChart Report

## FORMATTING A PIVOTCHART

Formatting changes the appearance of the chart. The formatting options available depend on the selected object. For example, if the chart area is selected, Excel allows the patterns, fonts, and chart area properties to be changed. The user can also use the buttons on the **Formatting** toolbar to format text, add values, data points, and data series, as well as fill colors and patterns.

To format a chart title using the formatting button on the **Chart** toolbar:

1. Open the file “*PivotChart2.xls*” from the student data drive.
2. Click on the worksheet “Chart1” to begin formatting.
3. Click on the chart title once to select it.
4. Click on the **Format Chart Title** button (see Figure 27). The *Format Chart Title* dialog box appears.



Figure 27 - Format Title Toolbar

5. Select *Font* tab. Change font type, font style, font size, and font color as desire (see Figure 28.)

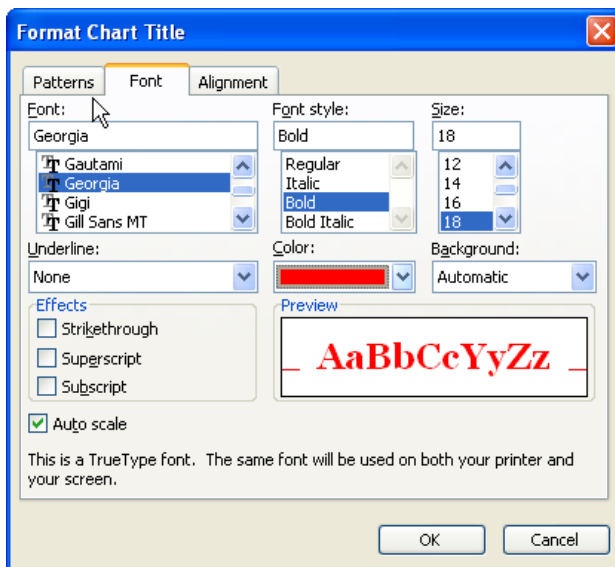


Figure 28 – Format Title (Font)

6. Select *Patterns* tab. Change border style, line color, line weight and filled area color as desire (see Figure 29).

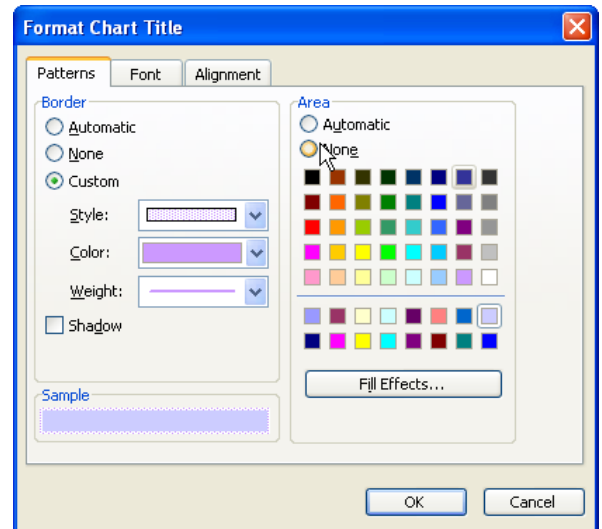


Figure 29 - Format Title (Patterns)

7. Select *Alignment* tab to change text alignment and orientation degree (see Figure 30).

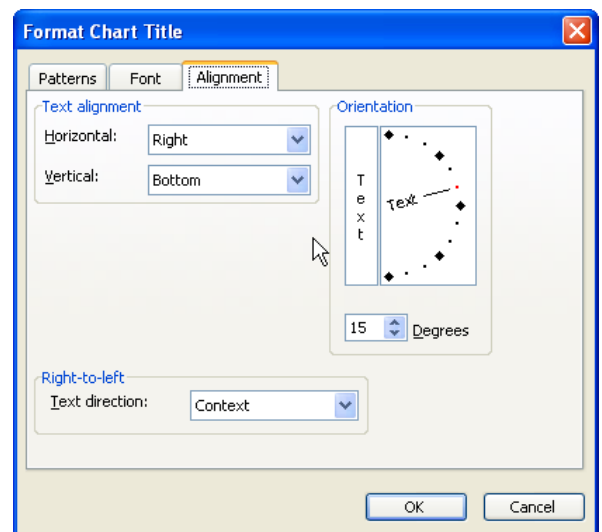


Figure 30 – Format Title (Alignment)

## Displaying Data labels

Without labels for data, it can be difficult to determine what each item refers to. Excel allows data labels to be displayed in the PivotChart.

To display data labels:

1. Select the **Chart** menu ► **Chart Options**.
2. Under the *Data Labels* tab, select the *Percentage* check box (see Figure 31).

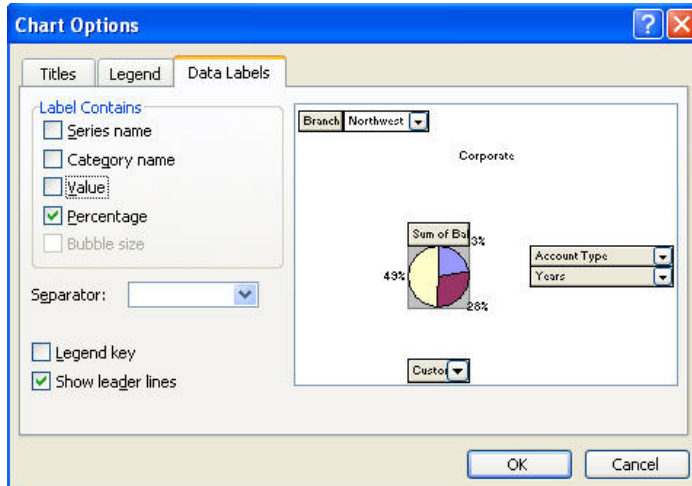


Figure 31 - Applying Data Labels

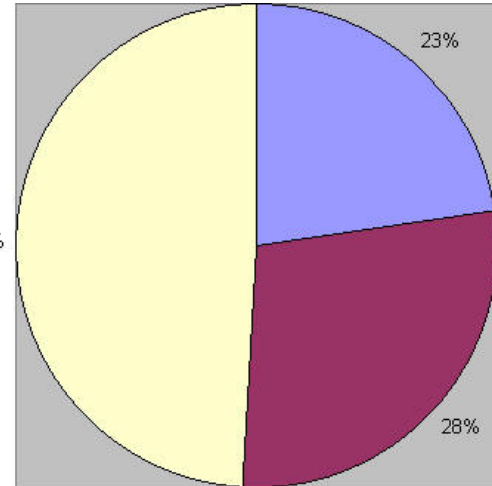


Figure 32 - Displaying Data Labels

## Saving and Publishing a PivotTable in HTML Format

Excel can save a PivotTable as an HTML document and modify HTML documents posted on an Internet or intranet site. The benefit of this feature is that the data fields can be manipulated, changed, and then printed while the document is posted. The changes cannot be saved in the Excel format. Changes made to the HTML document are saved in the HTML format.

### SAVING AND PUBLISHING A PIVOTTABLE

To save a PivotTable as a webpage:

1. Open the data file “*pivortable\_html.xls*” from the student data drive.
2. Click on the worksheet “*PivotTable*.”
3. Select the **F**ile menu, ► **S**ave as **W**eb **P**age.
4. Specify the location of the file to save (e.g., Desktop).
5. Select the  Selection: Sheet radio button (see Figure 33).

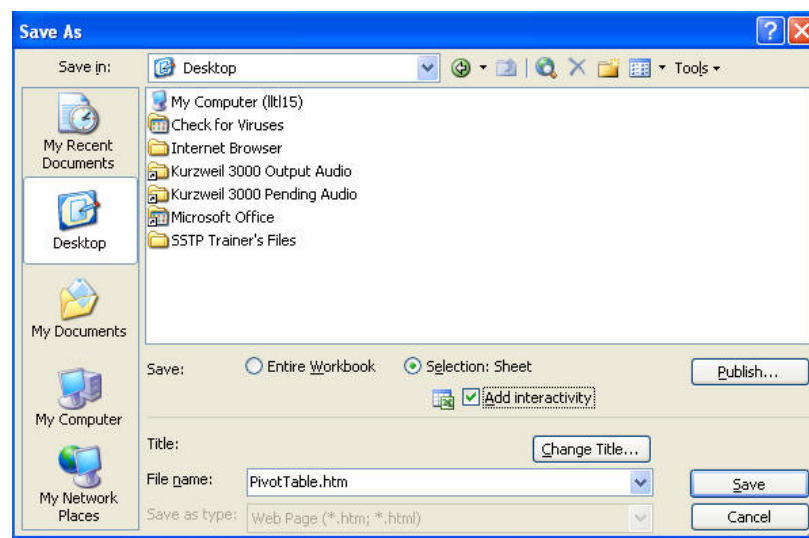

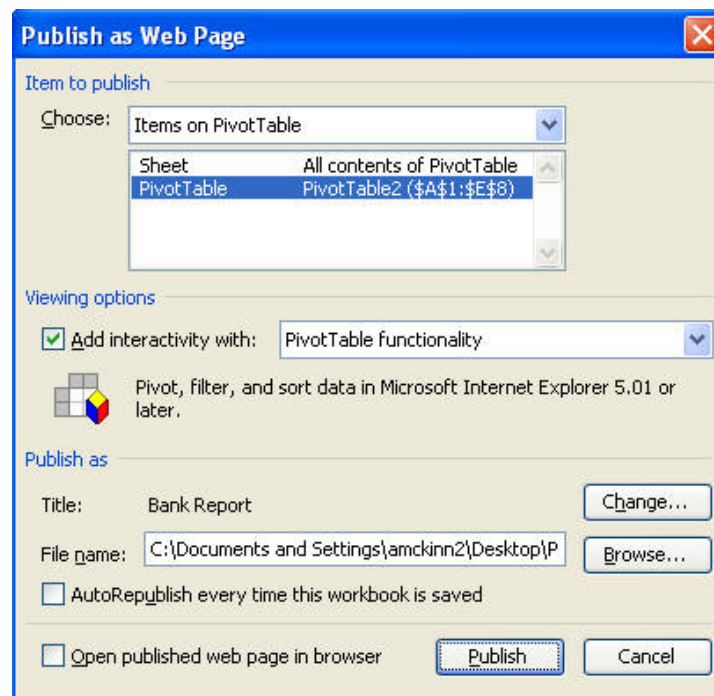


Figure 33 - Saving a PivotTable

**NOTE:** If a range is selected (PivotTable) before using the **Save as Web Page** command in the **File** menu, the *Selection* option will reflect the selected range instead of the entire sheet.

6. Check **Add interactivity**   **Add interactivity** option. The Add interactivity feature enables the user to create spreadsheet functionality (formulas and so on) or PivotTable functionality.
7. In the **File name** field, type **[PivotTable]**.
8. Click on the **Change Title...** button.
9. Type **[Bank Report]** in the *Change Title* box
10. Click **OK**.
11. Click on the **Publish** button.
12. In the *Publish As Web Page* dialog box, select the sheet from the **Choose** list. Then select the entire sheet or just the PivotTable range. For example, under the **Item to publish**, select **Items on PivotTable** and then **PivotTable (PivotTable2(\$A\$1:\$E\$8))** (see Figure 34).
13. Click on the Publish button.




**Figure 34 - Publish as a Webpage**

## **OPENING A PIVOTTABLE IN THE WEB BROWSER**

Once a PivotTable is saved as a web page, users can view the PivotTable in a web browser, such as **Internet Explorer** and **Netscape Navigator**.

To open a PivotTable in the web browser:

1. Launch **Internet Explorer** by clicking on the  icon.
2. In the **File** menu, select the **Open...** option to find the location of the PivotTable file. The *Open* dialog box appears.
3. Click on the **Browse** button (see Figure 35).

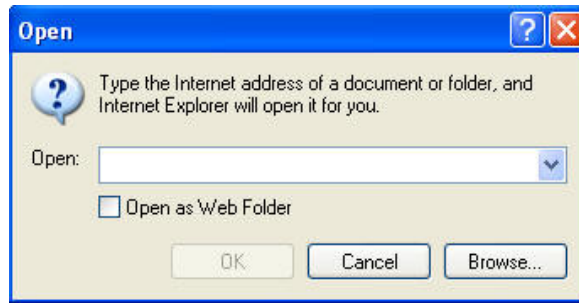


Figure 35 - Open the PivotTable in Web Browser

4. Click **Desktop** in the **Look in:** drop-down list and select the file, “*PivotTable.*”
5. Click the **Open** button.
6. In the *Open* dialog box, ► **OK** button. The PivotTable appears in the web browser (see Figure 36).


PivotTable2				
Branch				
Northwest				
Customer Type				
Corporate				
	+	-	+	-
Account Type	Sum of Balance		Sum of Balance	
CD	260726	391707.4	743100	1395533.4
Checking	296595.2	139930.9	64706.3	501232.4
Saving	302815.1	290550.9	153195.2	746561.2
Grand Total	860136.3	822189.2	961001.5	2643327

Figure 36 – Viewing the PivotTable in Web Browser


## **SORTING THE DATA RECORDS**

Excel enables users to arrange a list of records alphabetically or numerically according to the contents of the column or row. Unless otherwise specified, Excel automatically sorts from top to bottom. The data can be sorted in ascending and descending order. Ascending order sorts a list from the lowest to highest value. Descending order sorts a list from the highest to lowest value.

To sort in a descending order:

1. Place the cursor in the **Account Type** cell; notice that the column field zone is highlighted.
2. Click on the **Sort Descending** button  on the **PivotTable** toolbar.


To sort in an ascending order:

1. Place a cursor in the **Account Type** cell; notice that the column field zone is highlighted.
2. Click on the **Sort Ascending** button  on the **PivotTable** toolbar.

## Showing and Hiding Details


Excel enables users to show and hide details of the fields in the PivotTable.


To show details:

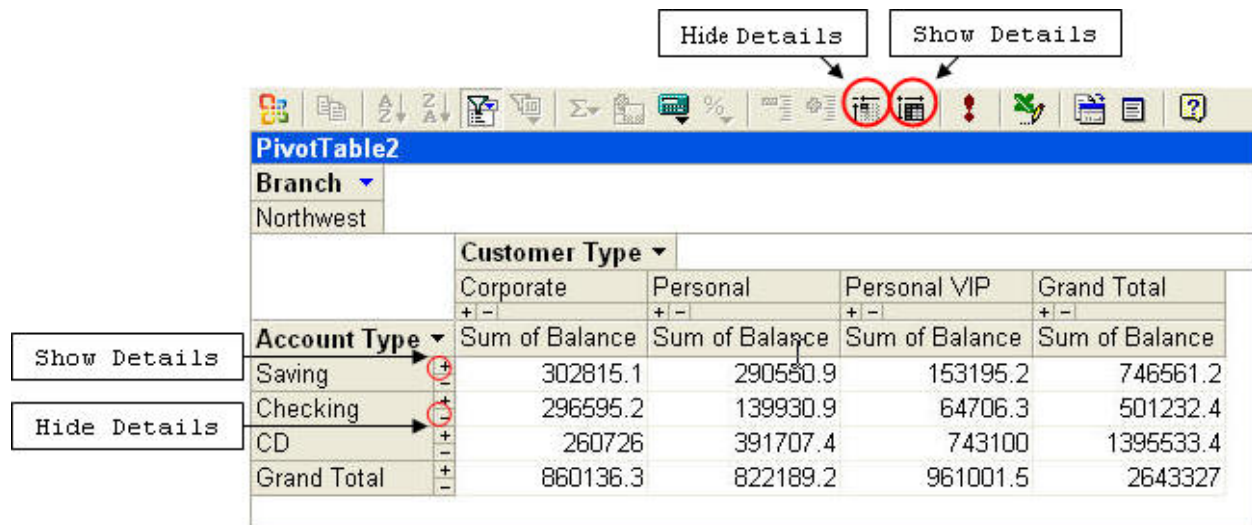
1. Place the cursor in the **Account Type** field; notice that the column field zone is highlighted.
2. Click on the **Show Details** icon  on the **PivotTable** toolbar to show details of all accounts.

NOTE: To show details of the specific account, click on the  button to the right of the account type.

To hide details:

1. Place the cursor in the **Account Type** field; notice that the column field zone is highlighted.
2. Click on the **Hide Details** icon  on the **PivotTable** toolbar to hide details of all accounts.


NOTE: To hide details of the specific account, click on the  button to the right of the account type.



The screenshot shows the PivotTable toolbar with 'Hide Details' and 'Show Details' buttons. Below the toolbar is a PivotTable with the following data:

PivotTable2				
Branch	Northwest			
Customer Type				
	Corporate	Personal	Personal VIP	Grand Total
	+/-	+/-	+/-	+/-
Account Type	Sum of Balance	Sum of Balance	Sum of Balance	Sum of Balance
Saving	302815.1	290550.9	153195.2	746561.2
Checking	296595.2	139930.9	64706.3	501232.4
CD	260726	391707.4	743100	1395533.4
Grand Total	860136.3	822189.2	961001.5	2643327

Figure 37 - Showing and Hiding Details



NOTE: The dropdown list can be used to select and deselect items. For example, to display all the items of the Account Type, select the  check box.

## Expanding and Collapsing Selections with Interactivity

Excel enables users to expand and collapse the selected item with interactivity as long as the selection is associated with source data. For example, if the users add the **Open date** field which is grouped by years, months, and dates in the PivotTable area, they can keep expanding the data by more specified dates.

To expand the selection:

1. Click on the **PivotTable Field List** icon  on the **PivotTable** toolbar (see Figure 38).
2. Click on the  icon in the **Open Date by Month** to display the details.

3. Drag the **Open Date by Month** field and drop it to the right of the **Account type** field.
4. Place the cursor on the **Years** field.
5. Click on the **Expand** icon  on the **PivotTable** toolbar. Notice that the **Quarters** field is displayed in the PivotTable.
6. Place the cursor on the **Quarters** field and click on the **Expand** icon  on the **PivotTable** toolbar.
7. To keep expanding the data, repeat step 5 until the **Days** field is displayed.

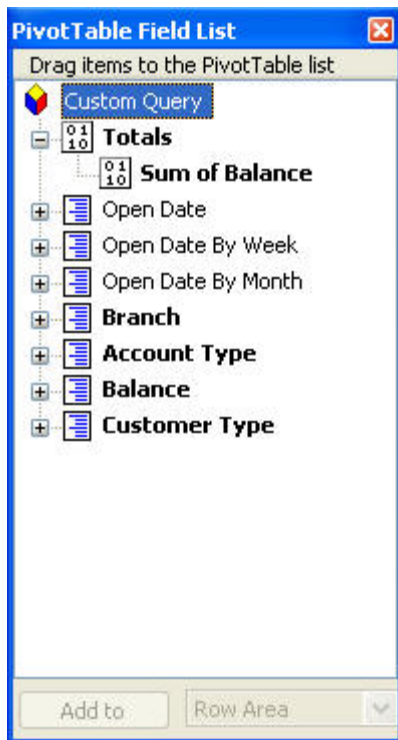



Figure 38 - PivotTable Field List

Account Type	Years	Quarters	Open Date	Days
Saving	2001	Qtr4	Dec	
		Total		
		Total		
	2002	Qtr1	Mar	
			Total	
		Qtr2	May	
			Total	
		Qtr3	Aug	
			Total	
	Total			
	2003	Qtr2	Jun	
			Total	
		Qtr4	Nov	
			Total	
		Total		
	2004	Qtr1		
Qtr2				
Qtr3				
Qtr4				
Total				

Figure 39 - Expanding the Selection

To collapse the selection:

1. Place the cursor on the **Years** field (see Figure 40).
2. Click on the **Collapse** icon  on the **PivotTable** toolbar. Notice that all other fields under the **Years** field are hidden in the PivotTable.

Account Type	Years	Quarters	Open Date	Days
Saving	2001			
	2002			
	2003			
	2004			
	Total			

Figure 40 - Collapsing the Selection



NOTE: Collapsing does not remove the field itself. To remove the unnecessary fields in the PivotTable, the user can right-click over the field category and select the **Remove Field** option.

## **FORMATTING A PIVOTTABLE SAVED AS A WEBPAGE**

Even if the PivotTable is opened in the web browser, the user can format the PivotTable to enhance its appearance. For example, the user can change the font type (the overall appearance), the font size (the amount of space the text occupies on the printed page) and the font style (bolding, italics, etc.). The user can also use the **Fill Color** button to add shading to a cell

background. Shading allows making items distinct from the rest of the worksheet. This section demonstrates how to format text and cells.

To format text and cells:

1. Place the cursor in the **Account Type** field.
2. Click on the **Commands and Options**  button on the **PivotTable** toolbar. The *Commands and Option* dialog box appears (see Figure 41).
3. Select *Format* tab.
4. Under **Text Format**, click on the **B** button to apply the bold effect, click on the **I** button to apply the italics effect, and click on the drop down arrow of the  button to change the font color.
5. Change the font type and size as desired by selecting from the drop down list of **Font:** text box.
6. Under **Cell format**, choose a desired color to add shading to a cell background. Notice that the new format is applied to the **Account Type** field in the PivotTable.

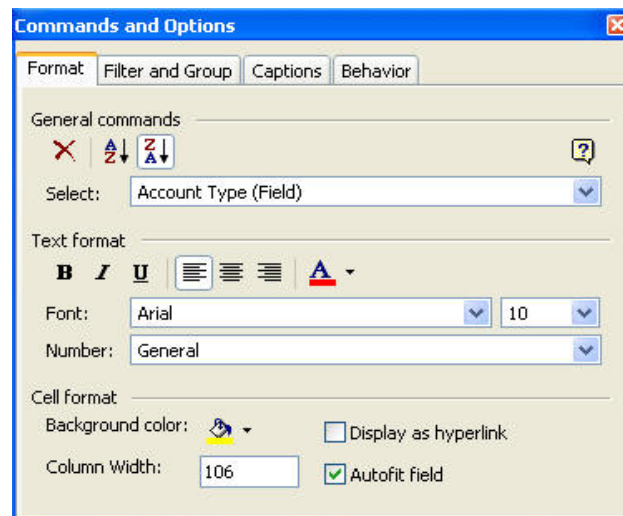


Figure 41- Commands and Options Dialog Box