

PivotTables create a very convenient and efficient way of analysing and interpreting data from internal lists and external databases. However, the data is presented in a tabular format. If the table is very large and complex it may be difficult to spot trends and patterns. As a consequence Excel combines the ease and convenience of **PivotTables** with its charting operations to provide you with **PivotCharts**.

In this session you will:

- ✓ learn how to create a **PivotChart** shell
- ✓ learn how to drag fields from the **Fields List** to build the **PivotChart**
- ✓ learn how to change the **PivotChart** type
- ✓ learn how to use the **PivotChart Filter** field buttons
- ✓ learn how to move a **PivotChart** to its own chart sheet.

CREATING A PIVOTCHART SHELL

Just as PivotTables are created using a structure or **shell**, **PivotCharts** begin life as an empty structure which need to be completed. The structure shell for a **PivotChart** is practically

identical to that of the PivotTable with the **PivotTable pane** used for manipulating the charts. There is also an additional **PivotChart Filter pane** and an embedded chart structure placeholder.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file E841 PivotCharts_1.xlsx...

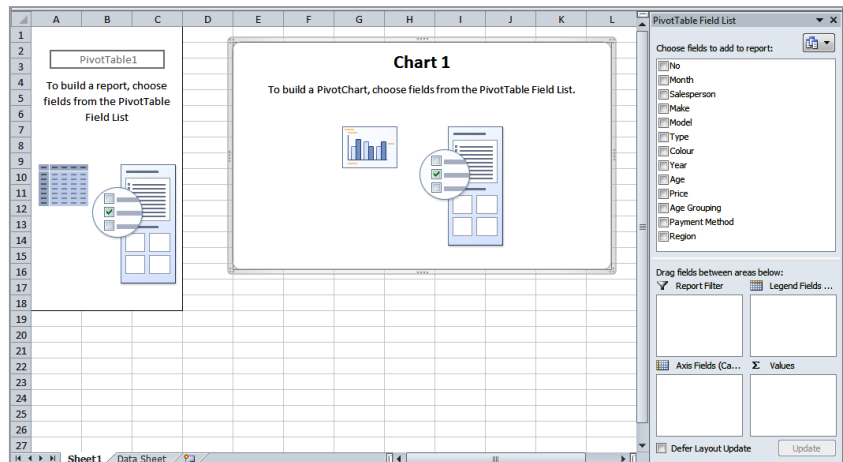
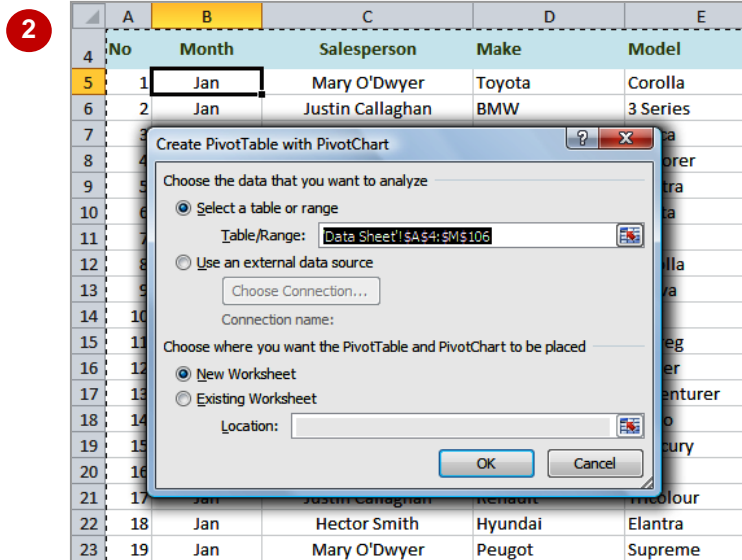
1 Click anywhere in the list of sales – this will enable Excel to determine the fields and records to be used in the PivotChart

2 Click on the **Insert** tab of the **Ribbon** and click on the bottom half of **PivotTable** in the **Tables** group, and click on **PivotChart**

The **Create PivotTable with PivotChart** dialog box is displayed...

3 Ensure that **Select a table or range** and **New Worksheet** are both selected, then click on **[OK]**

A **PivotTable** structure and a **PivotChart** structure will appear in a new worksheet together with the **PivotTable pane**



For Your Reference...

To **create** a **PivotChart shell**:

1. Click anywhere in the list, click on the **Insert** tab of the **Ribbon** and click on the lower half of **PivotTable**
2. Click on **PivotChart**, nominate the location for the table and click on **[OK]**

Handy to Know...

- The chart appears embedded in the worksheet with the **PivotTable** as a default. It can later be moved to its own chart sheet if required.

DRAGGING FIELDS FOR THE PIVOTCHART

PivotCharts are actually built using the same techniques and (almost) the same **PivotTable pane** as that used in standard PivotTables. The only real difference, apart from some naming

conventions, is that as you drag the fields from the field list into the various **PivotTable pane** areas, the chart is built in real-time together with the **PivotTable**.

Try This Yourself:

Same File

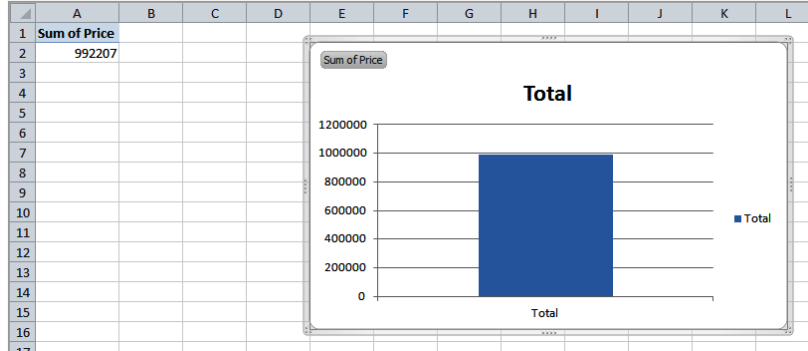
Continue using the previous file with this exercise, or open the file *E841 PivotCharts_2.xlsx...*

- 1 Drag the **Price** field from the **Field List** in the **PivotTable pane** to the **Values** area in the **PivotTable pane**

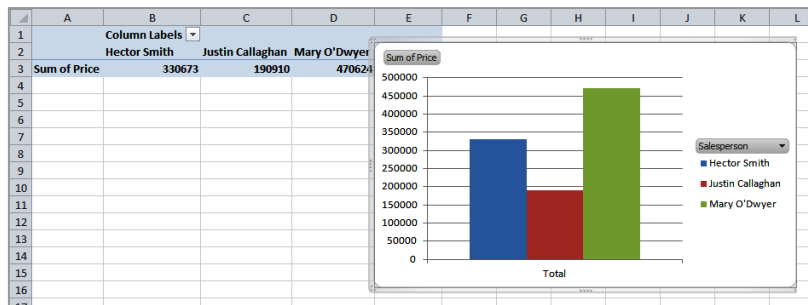
Both the **PivotTable** and the **PivotChart** will now commence to be built...

- 2 Drag the **Salesperson** field from the **Field List** to the **Legend Fields** area

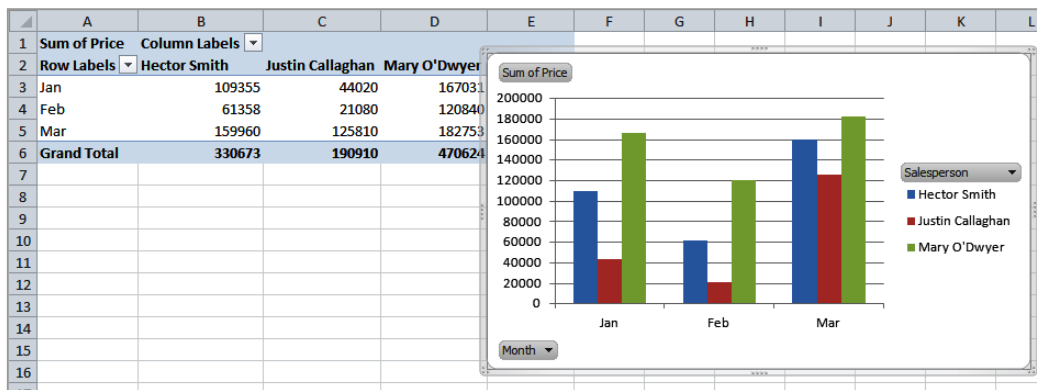
- 3 Drag the **Month** field from the **Field List** to the **Axis Fields** area



1



2



3

For Your Reference...

To **build** the **PivotChart**:

1. Drag fields from the **Fields List** in the **PivotTable pane**, to the **Values** area, the **Legend Fields** area and the **Axis Fields** area

Handy to Know...

- The **PivotTable** pane operates for charts in exactly the same way as it does for PivotTable reports. There is a subtle change in the area names – **Column Labels** becomes **Legend Fields**, while **Row Labels** become **Axis Fields**.

CHANGING THE PIVOTCHART TYPE


PivotCharts have more **Ribbon** tabs than **PivotTables**. The additional tabs allow you to change the **format**, **layout** and **design** of the actual PivotChart. These tabs mirror the options

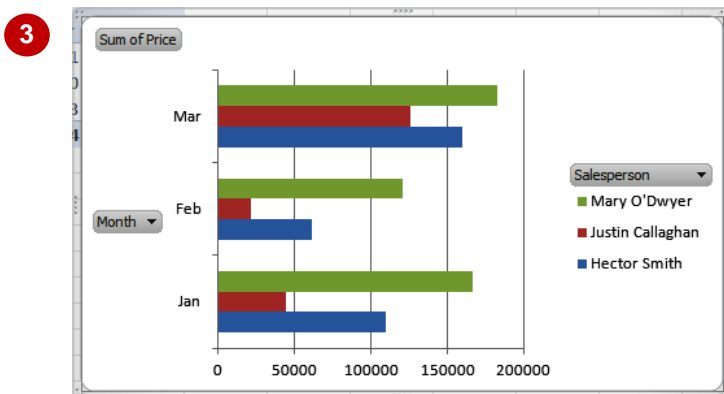
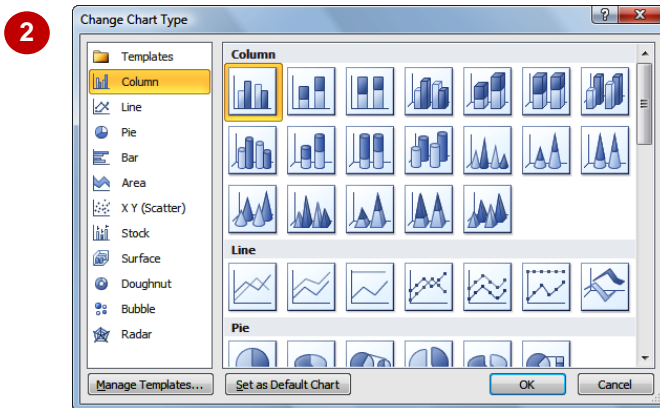
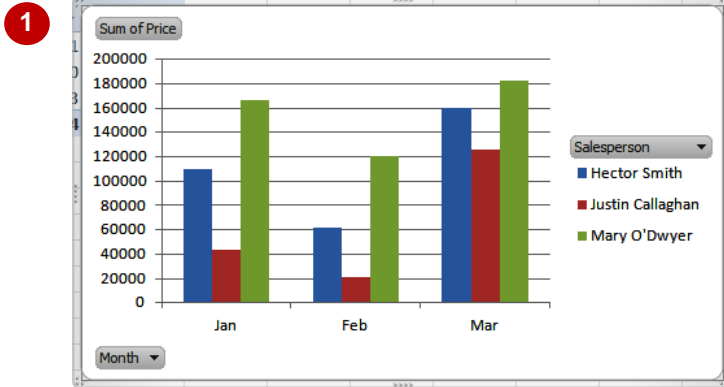
that would normally appear when working with charts. The tabs appear when the **PivotChart** is selected. When the **PivotTable** is selected, the tabs specific for a **PivotTable** appear.

Try This Yourself:

Same File


Continue using the previous file with this exercise, or open the file *E841 PivotCharts_3.xlsx...*

- 1 Click on the **PivotChart** to ensure it is selected, then click on the **PivotTable Tools: Design** tab of the **Ribbon**
- 2 Click on **Change Chart Type** , in the **Type** group, to display the **Change Chart Type** dialog box
- 3 Click on **Bar** in the list on the left, then click on **[OK]** to change the chart to a horizontal bar chart



For Your Reference...

To **change** the **chart type**:

1. Click on the chart to select it and click on the **PivotTable Tools: Design** tab
2. Click on **Change Chart Type** 
3. Click on the desired type and click on **[OK]**

Handy to Know...

- When working with **PivotCharts** you are actually working with Excel's full charting features. You can perform virtually any operation on a **PivotChart** that you could on a normal chart.

USING THE PIVOTCHART FILTER FIELD BUTTONS

The **PivotChart Filter field buttons** appear when a PivotChart is selected. These buttons appear next to the axis and legend fields on the actual PivotChart. It is an oddity, in that it allows

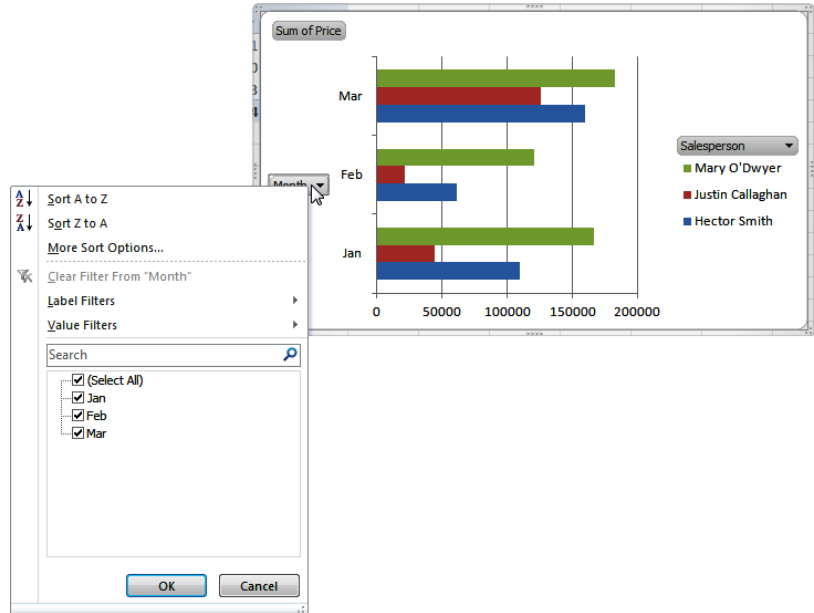
you to perform both sorting and filtering options on the fields that have been specifically chosen for the **axis** and **legend** fields.

Try This Yourself:

Same File

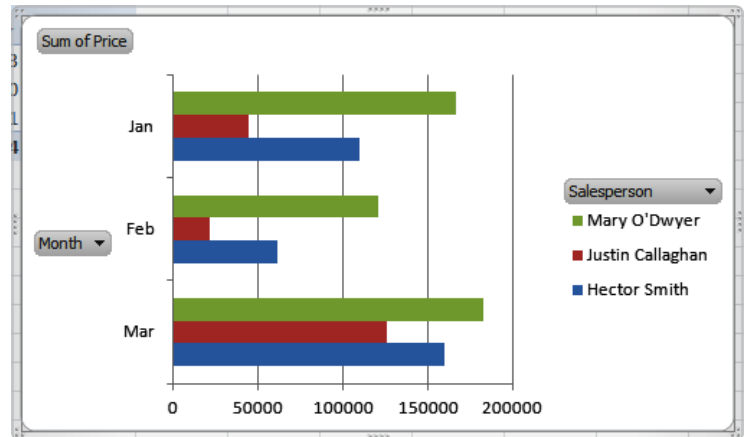
Continue using the previous file with this exercise, or open the file *E841 PivotCharts_4.xlsx...*

- 1 Click on the **PivotChart** to ensure that it is selected and to display the **PivotChart Filter** field buttons
- 2 Click on the **Month** filter field button to see a menu of options
- 3 Click on **Sort Z to A** to see the months so that **Jan** is displayed at the top



2

3



For Your Reference...

To use the **PivotChart Filter Pane**:

1. Click on the **PivotChart** to ensure that it is selected
2. Choose the appropriate filter field button and option

Handy to Know...

- In addition to performing a sort, you can also use the menus that appear in the **PivotChart Filter field buttons** to perform some pretty amazing filtering operations. It's worth spending a few moments playing around with the filters.

MOVING PIVOTCHARTS TO CHART SHEETS

While it is convenient to see both the **PivotTable** and the **PivotChart** in the one sheet when it comes to printing the chart or adding more detail it is often better to have the chart in its own

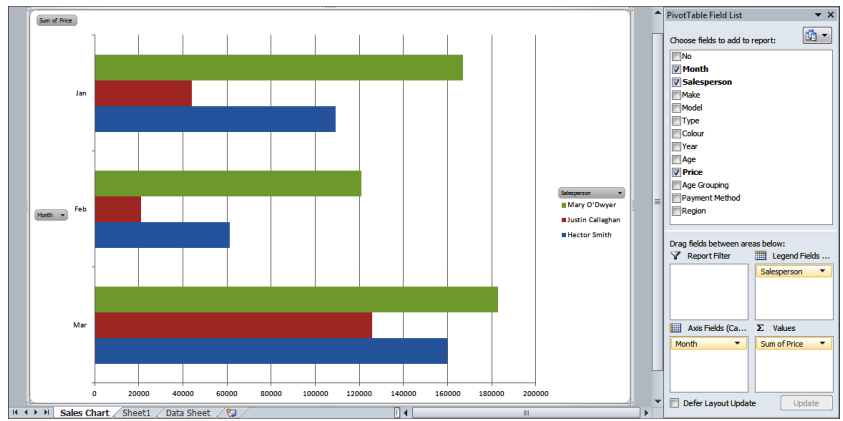
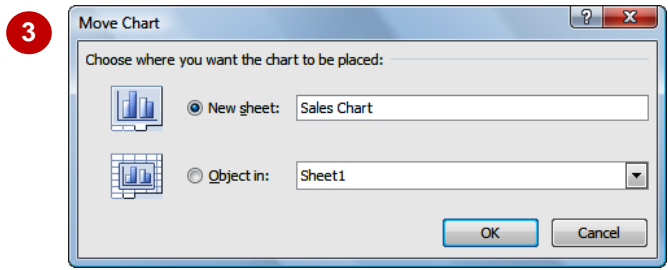
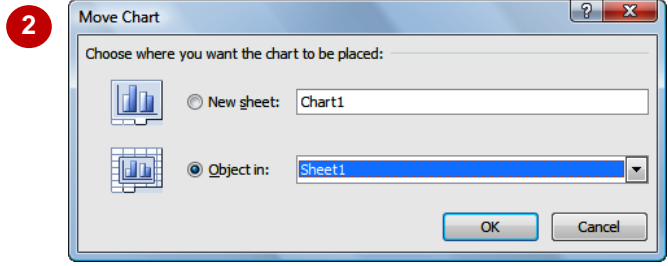
sheet. PivotCharts are just like any other charts (except that their data source comes from a table) and can therefore be moved to and from a worksheet and a chart sheet.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *E841 PivotCharts_5.xlsx...*

- 1 Click on the PivotChart to ensure it is selected, then right-click to display the short cut menu
- 2 Select **M**ove Chart to display the **M**ove Chart dialog box
- 3 Select the text in **N**ew Sheet and type **S**ales Chart – this will become the name of the new chart sheet
- 4 Click on **[OK]** to move the chart to its own sheet
Notice that the PivotTable pane is still visible...
- 5 Click on the **S**heet 1 worksheet tab to see only the **P**ivotTable that acts as the data source for the chart



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For Your Reference...

To **move** a **PivotChart** to its **own sheet**:

1. Right-click on the PivotChart and select **M**ove Chart
2. Provide a new chart sheet name then click on **[OK]**

Handy to Know...

- Even though a PivotChart is moved to its own chart sheet, it still retains the same functionality as when it was embedded in the same worksheet as the PivotTable.