

Pivot Table Example

Problem encountered: Unable to modify various attributes of a calculated field after the Pivot Table has been created.

Solution: The best method of describing the capabilities of the Calculated Field is to show several step-by-step methods to create a Calculated Field.

Exercise File: Open the file “Excel-3 PIVOTExample.XLS” to perform the following procedures.

Author: Jeff Hutchinson, jeffhutch@MyExcel.com, Cell: (801) 376-6687
If you have any questions you can contact me directly.

Method 1 – How to create new field in table and add field to existing pivot table?

It is easier to create a new field in the data table (Outside of the Pivot Table) and then add the new field to the pivot table. This is not the same as using a Calculated Field to create the new field, but is an alternate way to accomplish the same thing.

Step 1 – Create a Pivot Table

Open Sales1 sheet → Select table → Data → Pivot table → Next → Next → Finish
Drop Year in the Page field
Drop SalesRep in the Column
Drop Month in the row
Drop Profit in the data area

Step 2 - Create a new field in the table

Go back to the sales1 sheet
Create a new formula in column J called Expense
In cell J5=D5-I5 → Use the fill handle to populate all fields

Step 3 – Add new field to Pivot table

Switch back to Sheet1 the pivot table
R-Click on the Pivot table → Pivot Table Wizard →
Back → Select new area → Next → Finish

Step 4 – Add Expense field

Drag and drop the expense field to the data area
R-Click on the Sum of Expense title → Field Settings
Summarize by: Count → OK

Method 2 – Create new field in the Pivot table (Not in the data table)?

This procedure will explain how to modify a Calculated Field in-bedded in the Pivot. There are various attributes you can modify and some you are not able to modify.

Step 1 – Create a Pivot Table

Open Sales2 sheet → Select table → Data → Pivot table → Next → Next → Finish
Drop Year in the Page field
Drop SalesRep in the Column
Drop Month in the row
Drop Profit in the data area

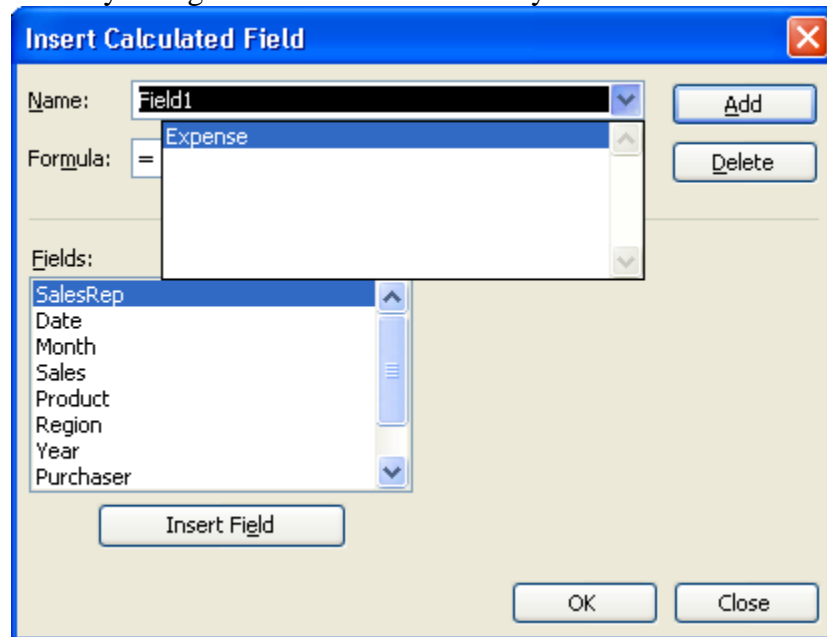
Step 2 – Create Calculated field in Pivot table

Click in data area → Insert → Calculated Field
Name: Expense
Formula = Sales - Profit
Add → Ok

Note: You should have a new fielding the “Pivot Table field list” called Expense.

Step 3 – Modify Formula

Select the “Sum of Expense”
From the menu bar Insert → Calculated Field
From the Name box at the top of the Insert Calculated Field dialog box click the drop down button and choose Expense. (See the screen shot below.)
Make the necessary changes to the formula → Modify → OK



Step 4– Modify the Sum of Expense field

R-Click on the label “Sum of expense” → Field Settings
Summarized By: Notice that the Summarize option can not be modified when you create a new field using method 2.
Options → Show Data As: This value can be adjusted if it fits your criteria.

Step 5 – To change the position of the “Sum of Expense”

R-Click on “Sum of Expense”
Order → Move Up/down