

The Pivot Table Source Data Checklist

The following is a list of items you should check before creating a Pivot Table.

Pivot Tables are an amazingly powerful tool and you will want to make sure your data is ready for the Pivot Table before you create it.

This includes organizing your data, formatting the numbers and text properly, removing blanks, and more.

It is best to go over this checklist each time you create a Pivot Table. It will save you time and help you get the most out of your Pivot Table by enabling features like Date Grouping.

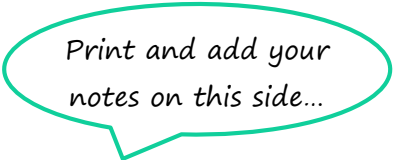
Pivot Table Source Data Checklist

	A	B	C	D	E
1	Order Date	Column3		Quantity	Revenue
2	Dec-1-14	Chai		64	\$1,152.00
3	Dec-2-14	Coffee		82	\$3,772.00
4	Dec-3-14	Green Tea		17	\$50.83
5	Dec-5-14	Cr		88	\$680.80
6					
7	Dec-5-14	Clam Chowder		89	\$858.85
8	Dec-5-14	Syrup		49	\$280.00
9	Dec-8-14	Curry Sauce		29	\$480.00
10	Dec-8-14	Green Tea		12	\$296.01
11		Dried Pears		81	\$2,430.00

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Introduction to Pivot Tables

If you are new to Pivot Tables and want to learn more, please check out my [Introduction to Pivot Tables Video Series](#). You will learn how to create Pivot Tables and Pivot Charts to create an interactive dashboard.



Print and add your notes on this side...

#1 Organize the Source Data in a Tabular Format

Your source data needs to be laid out in a way that the Pivot Table can interpret. The basic rule is that all the values of the same data type need to be in one column. There should only be one row of headers that describe the data.

Please see my article on [How to Structure Source Data for Pivot Tables](#) for a detailed explanation of this.

#2 Remove Blank Rows

It is best to remove any blank rows from your source data because blank rows will cause (blank) items to appear in all fields of your Pivot Table.

If your data contains a blank row, then you will see the word (blank) listed as an item in every field you put in the row or column area of the Pivot Table. You will then have to filter out the (blank) items on the Pivot Table for presentation purposes.

So it will save time to do this step up front and remove any blank rows.

#3 Remove Blank Columns

Excel does not allow you to create Pivot Table if there are blank columns in your data set. So you will have to delete the columns before you can create a Pivot Table.

A warning message will be displayed if you try to create a Pivot Table when there are blank columns in your data set, so it is best to avoid this up front.

If your data set contains a lot of columns, here is an easy way to check if it contains any blank columns:

1. Select all of the cells in the column header row (starting from the left side of your data set and to the last column on the right).
2. Press Ctrl+F on the keyboard to open the find window.
3. Press Enter or the Find Next button.
4. Any blank cells will be found.
5. Delete this row or give it a name if the column contains data.
6. Repeat steps 1-5 for the next blank column.

An alternative method is to use the Go To Special menu to select the blank cells in the header row. Then use the keyboard shortcut Ctrl+-(minus) to delete the columns.

#4 Convert Value Fields to Numbers (NOT Text)

Check that all the fields (columns) you will be adding to the values area of the Pivot Table are NOT stored as text.

If you are exporting your data from any type of system, often times the exported data will be stored as text. This is not good for the columns that contain values you want to summarize in the Pivot Table.

For example, let's say you have a "Sales Quantity" column in your data set that contains the number of units sold. You might want to summarize this column in your Pivot Table. If this column is stored as text, Excel will NOT automatically summarize the data when you add the field to the values area of the Pivot Table.

It is best to convert the data to numbers before adding the fields to the Pivot Table.

#5 Convert Date Fields to Dates (NOT Text)

Any fields that contain dates that are stored as text will not be interpreted properly by the Pivot Table. This is the same principle as #3 above.

If the columns that contains dates in your data set are stored as text, then you will not be able to use the date grouping feature in the Pivot Table. You will also lose the ability to change the format of how the date is displayed.

#6 Date Fields Should Not Contain Blanks

If any of the date columns in your data set contain blank cells, then you will not be able to use the Date Grouping feature in the Pivot Table.

The Date Grouping feature in the Pivot Table can be very useful if your data contains hundreds or thousands of rows with different dates in each row of a column. For example, let's say your data contains a column named "Invoice Date", and this column contains different dates for the past three years in each row.

The Date Grouping feature allows you to quickly group these dates into months or years, and then displays the summarized data in the Pivot Table.

However, if the date column contains any blank cells, then this feature will be disabled. So it is best to check for the blanks and either remove the rows, or add the correct date in the field.

#7 Rename Column Headers

The column headers of your data set become the field names of your Pivot Table. To make it easier to work with your Pivot Table, the field names should be:

- Easy to read and formatted nicely
- Short in length
- Easy to understand and interpret
- Unique names

You'll save a lot of time by renaming the columns to use short descriptions that are easy for you to understand. This will prevent you from having to navigate back to the source data and find the column name for the data you want to add to the Pivot Table.

#8 Put Your Source Data in a Table

Excel Tables are a great feature that can really save you a lot of time when working with your data.

Please see my [Excel Tables Tutorial Video](#) for a complete explanation of how to use Tables, and all their great benefits.

The biggest benefit of using a Table for the source data of a Pivot Table is that you will never have to worry about updating the source data range when new rows are added to your data set.

I hate when I make this mistake because it can be embarrassing. But using a Table for the source data reference completely eliminates this issue. When you refresh the Pivot Table, any new rows in the Table will automatically be included.

#9 Practice, Practice, Practice

I hope this checklist saves you time and helps get you started with creating a Pivot Table. My biggest recommendation is to continually practice these techniques until they become second nature to you.

Please contact me with any questions or let me know if there are items that I should add to this list.

Thank you!

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