Microsoft Excel Consolidate Data to Create a PivotTable

There will be occasions when a PivotTable needs to be created, however the data source is scattered in multiple worksheets and/or workbooks. Excel can *consolidate* this data into one worksheet and then summarize into a single PivotTable; via a feature called *PivotTable and PivotChart Wizard*.

	А		В	(2		D	Â		А		В		С		D	^
1	North Region (Q1 Sales)							1		South Region (Q1 Sales)							
2	Month	Rock F	Products	Paper F	roducts	Sciss	or Products		2	Month	Roc	k Products	Pa	per Products	Sciss	or Products	
3	January	\$	21,345	\$	22,345	\$	34,567	\$	3	January	\$	22,345	\$	13,234	\$	17,654	\$
4	February	\$	13,333	\$	23,456	\$	26,443	\$	4	February	\$	53,333	\$	46,454	\$	26,443	\$
5	March	\$	32,356	\$	17,665	\$	29,999	\$	5	March	\$	13,456	\$	43,456	\$	23,456	\$
6	Totals	\$	67,034	\$	63,466	\$	91,009	\$	6	Totals	\$	89,134	\$	103,144	\$	67,553	\$
7	North								7	Sout	h						
	North Q1 South Q1 East	t Q1 West Q1	÷			1 4				North Q1 South Q1 East	Q1 West C	1 ④			1 4		
	A .					_				0			_				
	A		В	(5		D			A		В		C		D	
1	A		-	ast Regic	: on (Q1 Sa	ales)	D		1	A		-	/est l	C Region (Q1 Si	ales)	D	
1 2	Month	Rock F	-	•			D or Products		1 2	A Month	Roc	-		C Region (Q1 Si per Products			
1 2 3		Rock F \$	E	•		Sciss		\$	1 2 3		Roc \$	W		v ,			\$
	Month		E Products	Paper P	Products	Scisso \$	or Products	\$ \$	3	Month	Roc \$ \$	W k Products	Pa	per Products		or Products	
3	Month January	\$	E Products 12,343	Paper P \$	Products 13,234	Scisso \$ \$	or Products 27,654	-	3	Month January	Roc \$ \$ \$	W k Products 32,345	Pa \$	per Products 35,645		or Products 24,345	
3 4	Month January February	\$ \$ \$ \$	E Products 12,343 33,333	Paper P \$ \$	Products 13,234 26,454	Scisso \$ \$ \$	or Products 27,654 32,432	\$	3 4	Month January February	Roc \$ \$ \$ \$	W k Products 32,345 42,342 31,234 105,921	Pa \$ \$ \$	per Products 35,645 36,435		sor Products 24,345 47,656	\$ \$
3 4 5	Month January February March	\$ \$ \$	E Products 12,343 33,333 23,456	Paper P \$ \$ \$ \$	Products 13,234 26,454 45,767	Scisso \$ \$ \$	or Products 27,654 32,432 24,332	\$ \$	3 4 5	Month January February March	\$ \$ \$	W k Products 32,345 42,342 31,234	Pa \$ \$ \$	per Products 35,645 36,435 17,895	Sciss \$ \$ \$	sor Products 24,345 47,656 47,654	\$ \$

Figure 1 – The data range needed to create the PivotTable is capture in four different worksheets.

First, add the *PivotTable and PivotChart Wizard* button on the Quick Access Toolbar; or, you can choose to add it to the Ribbon. (By default, this feature is not readily available on the Ribbon).

Go to File > Options > Quick Access Toolbar. From the 'Choose commands from' list, select All Commands and search for PivotTable and PivotChart Wizard. Add this to the Quick Access Toolbar. Click OK. *(See Bonus Tip at the end of this document).

Next, open the workbook(s) that contains the worksheets where the data needs to be consolidated.

From the Quick Access Toolbar, click (1) the PivotTable and PivotChart Wizard button.

Wizard Step 1 of 3, select (2) Multiple consolidation ranges.

(3) Select PivotTable, click (4) Next.

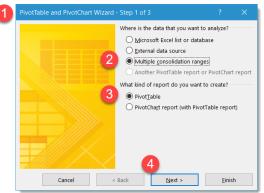


Figure 2 - PivotTable Wizard Step 1 of 3

1

Wizard Step 2 of 3, select (6) I will create the page fields, click (7) Next.

From each worksheet or workbook, select (8) the data range you want to include in the PivotTable,

Repeat these steps until you have gathered all

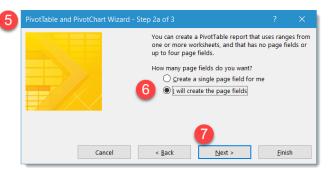


Figure 3 - PivotTable Wizard Step 2a of 3

Piv	otTable and PivotChart Wizard - Step 2b of 3	?	×
Wh	ere are the worksheet ranges that you want to consolidate? <u>R</u> ange:		
8	'North Q1'!\$A\$2:\$D\$5		Î
-	<u> </u>	Bro <u>w</u> se	
	All ranges:		
	'East Q1'!\$A\$2:\$D\$5		\sim
	North Q1!!\$A\$2:\$D\$5		
	'South Q1'!\$A\$2:\$D\$5 'West Q1'!\$A\$2:\$D\$5		
			\sim
Ho	v many page fields do you want?		

Figure 4 - PivotTable Wizard Step 2b of 3

From (10) 'How many page fields do you want?' select 1.

In (11) 'Field one:' type a label that identifies the data; i.e. North Region.

Repeat these steps by labelling all the data ranges.

Click (12) Next.

and click (9) Add.

your data ranges.

PivotTable and Piv	otChart Wizard	- Step	2b of 3		
Where are the works	heet ranges that	you war	it to consolidate?		
<u>R</u> ange:					
'North Q1'!\$A\$2	2:\$D\$5				Î
	<u>A</u> dd		<u>D</u> elete	Bro <u>w</u> se	·
All ranges:					
'East Q1'!\$A\$2:5	SD\$5				~
'North Q1'!\$A\$2	2:\$D\$5				
'South Q1'!\$A\$2					
'West Q1'!\$A\$2	\$D\$5				
					\sim
How many page field	ds do you want?				
○ 10	• 1	0	<u>2</u> C) <u>3</u>	<u>●</u>
What item labels do	vou want each pa	age field	to use to identify	the selected o	lata
range?	,			,	
Field <u>o</u> ne:			Field two:		
1 North Region		\sim			\sim
Field three:			Field four:		
					\sim
		12			
Cancel	< <u>B</u> ack		<u>N</u> ext >	<u>F</u> inish	1

Figure 5 - PivotTable Wizard Step 2b of 3

Microsoft Excel – Consolidate Data to Create a PivotTable Report Explainit2Me, LLC ©

Wizard Step 3 of 3, choose (13) where you want to place your PivotTable report. Click (14) Finish.

PivotTable and PivotCh		×	
	Where do you want to put the PivotTable report? Image: Wew worksheet Image: Stating worksheet		Î
	Click Finish to create your PivotTable report.		
Layout	Options Cancel < Back Next >	14 Einis	:h

Figure 6 - PivotTable Wizard Step 3 of 3

	А	В	С	D	E	F ,
1						
2						
3	Sum of Value		Column			
4	Row	Regions 🔹	Paper Products	Rock Products	Scissor Products	1
5	🗏 January	EAST	13234	12343	27654	
6		NORTH	22345	21345	34567	
7		SOUTH	13234	22345	17654	
8		WEST	35645	32345	24345	
9	🗏 February	EAST	26454	33333	32432	
10		NORTH	23456	13333	26443	1
11		SOUTH	46454	53333	26443	
12		WEST	36435	42342	47656	
13	🗏 March	EAST	45767	23456	24332	
14		NORTH	17665	32356	29999	ì
15		SOUTH	43456	13456	23456	
16		WEST	17895	31234	47654	4
17		-				.
18	PivotTa	ble Sheet North	n Q1 South Q1	East Q1 West	Q1 (+)	: •
Read	dy					

Figure 7 - Excel consolidates all your data ranges into one PivotTable report.

Bonus Tip: if you don't want to add the *PivotTable and PivotChart Wizard* button on the Quick Access Toolbar you can always use a keyboard shortcut to launch this feature; press ALT, D then press P.