

EXCEL <<<<<<<

By Bill Jelen

Filtering Multiple Pivot Tables in Excel 2010

Pivot tables create tiny summary tables or charts from large data sets. You can imagine a situation where you might arrange four to eight pivot tables on a single screen in order to create an Executive Dashboard. The problem has always been that each pivot table was driven by its own Report Filter fields. If the CEO changed the filter in one field, you either needed to use VBA macros to wire all the pivot tables together or count on the CEO to make the identical change to all of the report filters.

The new Slicers feature in Excel 2010 provides an intuitive visual filter to replace the functionality of the old Report Filter fields. In addition, a single set of slicers can easily be connected to drive multiple pivot tables.

Setting Up the Pivot Tables or Pivot Charts

Use the pivot table tools to build several small pivot tables. Rather than allow the pivot table to be created in cell A1 of a new worksheet, start arranging the pivot tables in cell E11 of your Dashboard worksheet. This will allow four columns to the left and 10 rows at the top where you can later arrange the slicers.

When you want to create a pivot chart, you should start with a pivot table that's on the Dashboard worksheet but out of view of the main screen. For example, build the pivot table starting in row 100. Once you have the pivot table built, click the PivotChart icon in the PivotTable Tools Options tab of the ribbon. You can then drag the resulting pivot chart up to the first screen of data.

For each pivot table, go to the Layout & Format tab of the Options dialog and uncheck the setting for "AutoFit column widths on update." This will prevent your column widths from changing as someone chooses new values from the slicers.

Adding Slicers to the First Pivot Table

Slicers are visual filters that you can arrange anywhere on the screen. Select a cell in one pivot table and choose Insert, Slicers. Excel will offer a list of all fields in the pivot table. Choose several fields to use as filters in your pivot table.

Excel will initially tile all of the slicers in the middle of the screen. The slicers initially start as a single column of light-blue tiles. You should rearrange the slicers to best fit the screen.

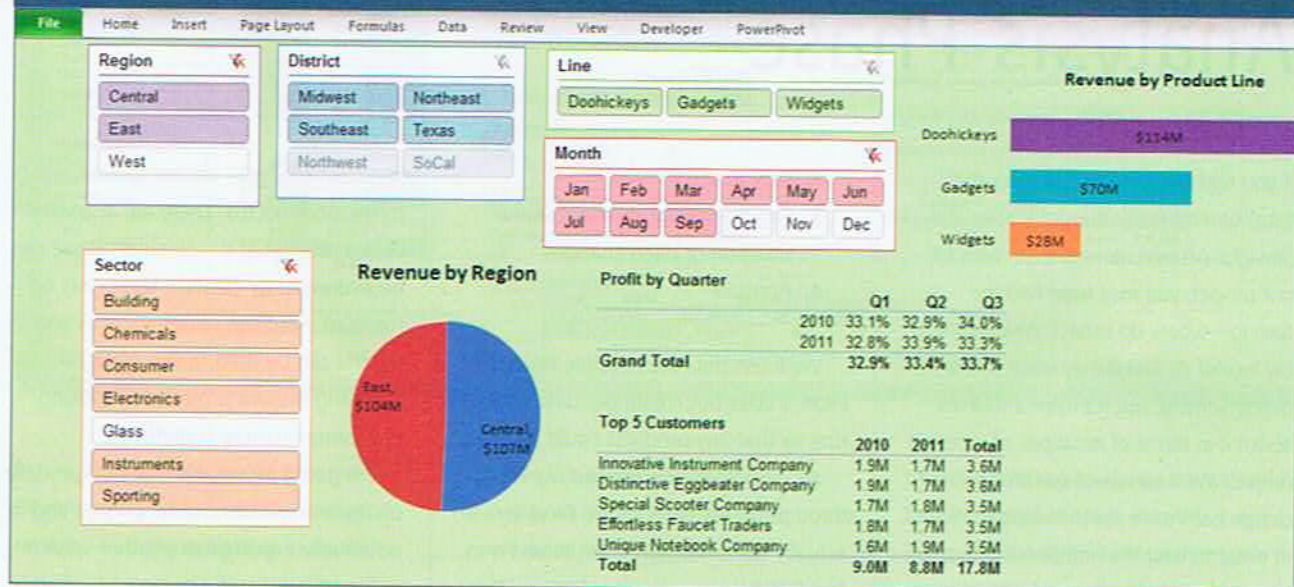
Any slicers that contain long lists of items would work well as a vertical list to the left of the dashboard. Find the slicer with the longest list of items and drag it to the blank columns A:D to the left of your pivot tables. When the slicer is active, a new Slicer Tools Options ribbon tab is available. Choose a color for the vertical slicer from the Slicer Styles gallery.

Slicers with short lists of items can be rearranged to have multiple columns and fewer rows. Use the Columns button on the right side of the Slicer Tools Options tab of the ribbon.

Connecting Slicers to the Other Pivot Tables

The Insert Slicer icon on the PivotTable Tools Options tab of the ribbon is a new type of icon. Click the top half of the icon to get the Insert Slicers dialog. If you click the bottom half of the icon, however, you will get a flyout menu with more choices. The key to connecting the other pivot tables is to use the bottom half of the Insert Slicer icon. Choose one cell in your second pivot table. Click the bottom of the Insert Slicer icon and choose Slicer Connections.

Figure 1



Excel will display the Slicer Connections dialog with a list of all of the active slicers. Choose each slicer to connect that slicer to this pivot table.

Repeat for the remaining pivot tables, including any pivot tables used to create the pivot charts.

Using the Slicers

It's possible to select multiple items from a slicer. One way is to click the first item and then hold down CTRL while clicking on the remaining items. The other way is to click on the first item and drag until you've selected several contiguous items. The dashboard in Figure 1 shows January through September selected. You can

easily do this by clicking January and dragging to September.

Making the Dashboard Look Less Like Excel

With a few extra clicks, you can make the dashboard look less like Excel. Select all cells with CTRL+A. Choose a light fill color from the Home tab, which will also remove the gridlines. On the View tab, uncheck the Headings and Formula Bar boxes to hide the column letters, row numbers, and the formula bar. If you prefer a white background rather than a fill color, you can also uncheck the Gridlines box here to hide the gridlines. Finally, minimize the ribbon using the Carat

symbol at the top-right edge of the Excel 2010 ribbon.

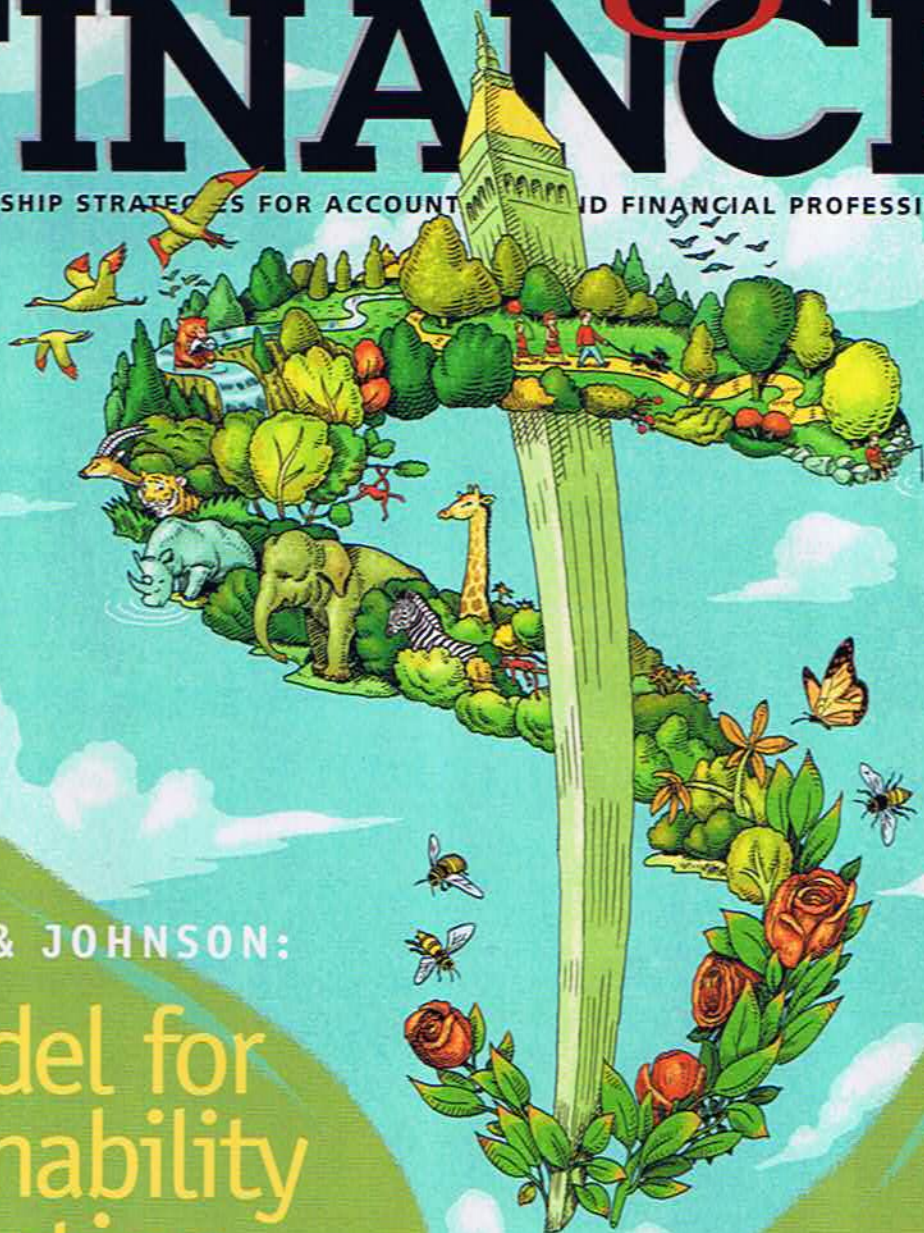
Sharing the Dashboard in a Browser

It's possible to share small dashboards in a browser on the Windows SkyDrive. People viewing the dashboard on the SkyDrive will be able to interact with the slicers and see the reports and charts update. To try out the workbook from this article, go to <http://tinyurl.com/SFXL9>. **SF**

Bill Jelen is the host of MrExcel.com and the author of 32 books about Excel, including Excel 2010 In Depth. Send questions for future articles to IMA@MrExcel.com.

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