

I'm not a bot





In this Excel tutorial, you'll discover how to create a report using Excel's capabilities. You can utilize PivotTable to organize raw data, generate charts for visualization, and print them in a suitable format. Let's use a sales dataset as an example. To get started, download the Practice Workbook Creating Report in Excel.xlsx Now, let's break down the process into five straightforward steps. They are: Managing Data Inserting a Pivot Table Organizing Data Creating a Chart Visualizing Data Summarizing and Printing the Report with a Proper Header and Footer Let's put these steps into action using a sample Sales Report. Step 1 - Managing Data We have some sample sales data containing columns for Salesperson, Region, Product, Category, Date, Units Sold, and Revenue. This dataset consists of 100 rows, but we'll only show the first 23 rows here. To create a report, we need to organize this data in a way that extracts meaningful information. The Pivot Table feature is an excellent option for organizing scattered data like this. Read More: How to Generate PDF Reports from Excel Data Step 2 - Inserting a Pivot Table Select any cell within the dataset and go to the Insert tab; click on the PivotTable option. A new dialog box will appear, prompting you to select the source range, destination, and other settings. Once you've made your selections, click OK. You'll see a PivotTable layout around the selected cell and a Fields list in the right corner. Depending on how you want to summarize and present data, drag fields into different areas. We chose the following arrangement: The PivotTable will be generated as soon as you arrange the fields. You may need to adjust some auto-generated Labels. Read More: Create a Report in Excel as a Table Step 3 - Creating a Chart Click on any cell within the PivotTable and go to PivotTable Analyze; click on PivotChart. In the Insert Chart window, toggle between different chart types and styles until you find one that suits your needs. Once you've made your selection, click OK. A chart will be generated on the worksheet. You may want to add elements like Axis Title or Chart Title, and format the chart for better presentation. Step 4 - Summarizing a Report We can compile the chart and pivot table in one location for printing. Read More: Create Report That Displays Quarterly Sales by Territory in Excel Step 5 - Printing the Report Decide whether you want to print the entire workbook, a specific worksheet, or a portion of it. Since we want to print the summary table with the chart, select that portion and click on Print from the menu. You'll see various options related to printing, including settings for the printer and more. To generate reports from PDF files, we used Microsoft Print to PDF option. We selected only print the current selection under Print Selection menu. Additionally, you can customize page size, margins and orientation. You can also add headers and footers using Page Setup dialog box. You can choose from predefined templates or create custom ones for headers and footers. Margins can be customized by going to Margins tab. The preview is available on the right side of File tab. Click on Print option to print report. To customize your chart, start by clicking on 'Line with Markers'. This will allow you to add a title to your chart, such as 'Wildlife Population', and easily switch between different types of charts at any time. To do this, follow these steps: select the chart, go to the 'Chart Design' tab, click on 'Change Chart Type' in the 'Type' group, choose 'Column', and then click 'OK'. If you want to display animals instead of months on the horizontal axis, simply switch rows and columns by selecting the chart, going to the 'Data' group, and clicking on 'Switch Row/Column'. To move the legend to the right side of the chart, select it, click the '+' button, and then choose 'Right' from the drop-down menu next to Legend. Finally, use data labels to draw attention to specific data points by selecting the chart, choosing a green bar for the selected data series, holding down CTRL, using your arrow keys to select a specific point (in this case, the population of Dolphins in June), clicking on the '+' button, and checking the box next to Data Labels.

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