



Excel Pivot Tables and Pivot Charts

Overview: This course is designed for students who need to use Excel to summarize large amounts of data and to analyze it in a variety of ways. Students will learn how to create and modify a PivotTable, create a chart from a PivotTable, and use various options to adapt to their information needs.

Prerequisites: Microsoft Excel Introduction or equivalent knowledge.

Course Length: One Day

Course Content

Lesson 1: Understanding Pivot Tables

- Understanding Data Analysis
- Introducing the PivotTable
- Learn PivotTable Benefits
- Survey PivotTable Uses
- Explore PivotTable Features
- Introducing the PivotChart

Lesson 2: Building A Pivot Table

- Prepare Your Worksheet Data
- Create a List for a PivotTable Report
- Build a Basic PivotTable from an Excel List
- Add Fields Using the PivotTable Wizard
- Re-create an Existing PivotTable

Lesson 3: Manipulating Your Pivot Table

- Turn the PivotTable Toolbar On and Off
- Customize the PivotTable Toolbar
- Select PivotTable Items
- Remove a PivotTable Field
- Refresh PivotTable Data
- Display the Details Behind PivotTable Data
- Create a Chart from PivotTable Data
- Add Multiple Fields to the Row or Column Area
- Add Multiple Fields to the Data Area
- Add Multiple Fields to the Page Area
- Publish a PivotTable to a Web Page
- Convert a PivotTable to Regular Data
- Print a PivotTable
- Delete a PivotTable

Lesson 4: Changing The Pivot Table View

- Move a Field to a Different Area
- Display a Different Page
- Change the Order of Fields Within an Area
- Sort PivotTable Data with AutoSort
- Move Row and Column Items
- Show Only the Top 10 Items
- Hide Items in a Row or Column Field
- Show Hidden Items in a Row or Column Field
- Show Pages as Worksheets
- Group Numeric Values
- Group Date and Time Values
- Group Text Values
- Hide Group Details
- Show Group Details
- Ungroup Values
- Change the Page Area Layout

Lesson 5: Customizing Pivottable Fields

- Rename a PivotTable Field
- Rename a PivotTable Item
- Format a PivotTable Cell
- Apply a Numeric Format to PivotTable Data
- Apply a Date Format to PivotTable Data
- Apply a Conditional Format to PivotTable Data
- Show Items with No Data
- Exclude Items from a Page Field

Lesson 6: Setting Pivot Table Options

- Apply an AutoFormat
- Preserve PivotTable Formatting
- Rename the PivotTable
- Turn Off Grand Totals
- Merge Item Labels
- Specify Characters for Errors and Empty Cells
- Protect a PivotTable

Lesson 7: Performing Pivot Table Calculations

- Change the PivotTable Summary Calculation
- Create a Difference Summary Calculation
- Create a Percentage Summary Calculation
- Create a Running Total Summary Calculation
- Create an Index Summary Calculation
- Turn Off Subtotals for a Field
- Display Multiple Subtotals for a Field
- Include Hidden Pages in PivotTable Results

Lesson 8: Creating Custom Pivot Table Calculations

- Introducing Custom Calculations
- Understanding Custom Calculation Limitations
- Insert a Custom Calculated Field
- Insert a Custom Calculated Item
- Edit a Custom Calculation
- Change the Solve Order of Calculated Items
- List Your Custom Calculations
- Delete a Custom Calculation



Lesson 9: Building More Advanced Pivot Tables

Create a PivotTable from Multiple Consolidation Ranges

Create a PivotTable from an Existing PivotTable

Create a PivotTable from External Data

Set Up a Server-Based Page Field

Set External Data Options

Export PivotTable Data from a Web Page to Excel

Reduce the Size of PivotTable Workbooks

Use a PivotTable Value in a Formula