

Pivot Table TOC

Required Prerequisites

Intermediate Excel skills.

Module 1: Creating and Modifying PivotTables

PivotTables

- Guidelines for Data in a PivotTable

Creating PivotTables

- Creating a PivotTable
- Using Recommended PivotTables
- Using the Quick Analysis Tag

PivotTable Elements

- Adding Fields
- PivotTable Fields Pane
- PivotTable Tools Tabs

Adjusting PivotTable Layouts

- Using the PivotTable Options Dialog
- Using the Design Tab
- Setting the Default Layout

Formatting PivotTables and Fields

- Using the Design Tab
- General Formatting Options
- Value Field Settings
- Showing More Than One Value Calculation

Expanding & Collapsing Fields

Refreshing PivotTables

- Refreshing a PivotTable
- Re-Defining the PivotTable Data Range

Module 2: Filtering PivotTables

Filtering Data

- Sorting a PivotTable
- Basic Sorting
- Basic PivotTable Filtering

- Basic Filtering
- Filtering a PivotTable
- Filtering in the Report Filter

Advanced Filtering

- Label and Value Filters
- Using the Top or Bottom 10

Report Filters

- Using Multiple Report Filters
- Using the Search Box to Apply a Filter
- Using Wildcards

Filtering With Search Box

Adding to Filters

- Adding Criteria to an Existing Filter

Conditional Formatting in a PivotTable

- Using Conditional Formatting
- Clearing Conditional Formats

Grouping Data

- Grouping Data in a PivotTable
- Sorting by Fiscal Year

Using the Slicer

- Using Slicers
- Closing or Deleting a Slicer
- Formatting a Slicer
- Using the Slicer Settings Dialog
- Slicer Connections

Module 3: Advanced Features of PivotCharts

PivotTable and PivotChart Wizard

- Considerations for Setting Up Your Source Data

Installing PivotTable and PivotChart Wizard

Using the Wizard

- Step 1: What Type of Consolidation do I want?
- Step 2: Choosing the Data Source
- Step 3 Where to add PivotTable or PivotChart

Consolidating Multiple Workbooks Or Worksheets

- Consolidating Data From Multiple Excel Sources
- Using The Create A Single Page Field
- Creating Your Own Page Fields

Editing A Consolidated PivotTable

- Modifying a Consolidated PivotTable
- Using Find&Replace to Rename Page Field Items

Calculated Fields and Calculated Items

- Creating a Formula in a PivotTable Report

Adding A Calculated Item

Adding a Calculated Item to a Field

Adding A Calculated Field

- Adding a Calculated Field
- Editing Calculated Items Or Fields
- Editing Calculated Items
- Deleting Calculated Items
- Editing Calculated Fields
- Deleting Calculated Items

Solve Order and Displaying Formulas

- Changing the Order
- Displaying Formulas

Module 4: Creating and Modifying PivotCharts

PivotCharts

- Inserting PivotCharts
- Creating a PivotChart from the Source data
- Creating a Chart Based on an Existing PivotTable

Filtering PivotCharts

- Using Field Filter Drop-downs
- Adding Slicers and Timelines

Formatting PivotCharts

- Using the Format Shape Dialog Box

Module 5: Creating PivotTables from External Data

Get Data from a CSV File

- Connecting to CSV files

Power Query

- Using Power Query
- Managing Columns; Split a Column
- Sorting & Filtering Data

Editing a Query

- Accessing the Queries

Appendix A

Unlocking a Slicer

- Unlocking a Slicer in a Protected Worksheet

Custom Slicer Styles

Creating Custom PivotTable Styles

- Creating a Custom PivotTable Style
- Applying a Custom PivotTable Style
- Modifying a Custom PivotTable Style

Using Custom PivotTable Styles

- Using a PivotTable Style in Another Workbook

Appendix B

Troubleshooting Data

- Leading and Trailing Spaces
- The TRIM Function
- Selecting Blank Rows/Columns for Elimination