

ExecuTrain Course Outline

Excel Pivot Tables

1186 v04

1 Day

Description

This in-depth one-day course introduces Microsoft Excel – PivotTables for users who need to generate several reports using the same data. PivotTables are one of the most powerful yet under-utilized features in Microsoft Excel. In-class exercises will involve use of data tables to format and print pivot table data. Students will also learn how to create and use Pivot charts, import and export information data.

Prerequisites

Excel Beyond Basics course or equivalent knowledge.

Who Should Take This Course?

Microsoft Excel 2003 users who are working with large worksheets and need to organize the lists and summarize specific fields while excluding others. Excel users who want to use PivotTable as a business intelligence tool to analyze data and generate reports will find this course very useful.

Objectives

- ✓ Introduction to PivotTables
- ✓ Creating PivotTables
- ✓ Formatting a PivotTable
- ✓ Limitations of Pivot Tables
- ✓ Editing PivotTables
- ✓ Updating PivotTables
- ✓ Modifying PivotTables
- ✓ Pivot Tables Using Disparate Data Sources
- ✓ Grouping PivotTable Data
- ✓ Hiding and Showing Source Data
- ✓ Using Calculations in PivotTables
- ✓ Using Page Fields
- ✓ Printing a PivotTables
- ✓ Creating a Pivot charts
- ✓ Creating Interactive Pivot Tables for the Web
- ✓ Using External Data

Outline

Introduction to PivotTables

PivotTable Definition
When to Use PivotTable
PivotTable Terminology
Data Appropriate for a PivotTable

Creating PivotTables

Specifying the Data Location
Specifying the Data
Row Fields
Column Fields
Page Fields

Data Fields
Completing the PivotTable

Formatting PivotTables

Format Cells
Conditional Formatting
Remove Conditional Formatting
Auto Format
Remove Auto Format

Limitations of PivotTable Reports

Maximum Size
Column and Row Field Limits

Maximum Number of Records

Editing PivotTables

PivotTable Options
Changing How the PivotTable Data is summarized

Updating PivotTables

Automatically Refresh PivotTable
Refresh Multiple PivotTable

Modifying PivotTables

Adding Fields to a PivotTable
Removing Fields from a PivotTable
Changing the Layout of a PivotTable
Multiple PivotTables in a Single Worksheet

Pivot Tables Using Disparate Data Sources

Working with disparate data sources
Using multiple consolidation ranges
Creating Pivot Table from an Existing Pivot Table

Grouping PivotTable Data

Grouping with Dates, Weeks, Months, Years
Grouping with Numbers
Grouping with Texts

Hiding and Showing Source Data

Hide / Show a Value
Display a Hidden Value
Hide Zero Value Lines

Using Calculations in PivotTable

Calculated Fields
Calculated Items
Custom Calculations
Rules and Shortcomings of Pivot Table Calculations

Using Page Fields

Adding Page Fields
Removing Page Fields
Displaying a Specific Page
Displaying a Page Fields on Separate Sheets

Printing PivotTables

Set Print Area
Repeat Titles
Set Automatic Page Breaks
Manual Page Breaks
Exit Page Breaks Preview

Print Preview

Creating Pivot Charts

Create a PivotChart
Display a PivotChart
Modify a PivotChart
Multiple Pivot Charts in a Worksheet

Creating Interactive PivotTables for Web

Create a Web based PivotTable
Publishing PivotTables on the Web

Using External Data

External Data Sources
Importing and Using External Data
Data Options