



Microsoft Excel Pivot Tables

McGovernConsultancy.com
Duration 1/2 Day
Format Instructor Led

Overview

This half day course takes an in-depth and intensive look at the world of Excel pivot tables. The course covers building complex pivot tables, using some of the built in calculation options in the reports, formatting, adding calculated fields and groups to the pivot table.

We look at using pivot charts, slicers, timelines, linking slicers to different pivot reports, creating the dashboard effect, modifying slicers, their properties, features and appearance.

In the 2013 version we look at using the data model to link different tables of data in the same spreadsheet into the same pivot. We also cover the COUNT DISTINCT feature.

Also we look at the Power Pivot add in in 2010 and 2013 versions and we explore linking different files together.

Objectives

On completion of this course, participants will be able to do the following:

Pivoting Data

- Data Ribbon
 - o Existing Connections
 - o From Other Sources
 - o From Access
- Getting started
 - o Insert>Pivot Table

info@mcgovernconsulting.com

Phone: (01) - 442 - 6238

Mobile: 086 - 172 - 0394

- o Lesson
- Working with Pivot Table Data
 - o Expanding/Filtering
 - o Collapsing/Auto & Custom Filter
- Sorting/Grouping
- Changing Data Source
- Formatting a Pivot Table
 - o Using Pivot Tools - Option & Design
 - o Options > Field Settings Must be Clicked on Field
- Classic PivotTable Layout
 - o Options> Display> Classic Pivot Table
 - o Lesson
- Advanced Tasks
 - o Insert> Slicer
 - o Lesson XML

Pivot Tables

- Breaks in List of Numbers
- Sub Totals
 - o % Grand Total
 - o % Column & Row Total
 - o Running Totals
 - o % Parent Row/% Parent Column
 - o Differences/Index etc.

- Conditional Formatting
 - o Greater Than/ Above Average
 - o Data Bars
 - o Edit Data Bars
 - o Colour Scales
 - o Edit Colour Scales
 - o Using a formula
 - o Duplicate Values
 - o Pivot Tables
- Calculated Fields
- Groups
 - o Columns
 - o Rows
- Calculated Items
- Percentages
 - o Drag a copy of field on
 - o Using percentage groupings
- GETPIVOTDATA
 - o Function Builder
 - o Turn On & Off

Charting Pivot Data

- Charts
- Pivot Charts

- o Insert>Pivot Chart
- o Practise Pivots or Lesson
- Pivot Chart Tool Tab
 - o Design
 - o Layout
 - o Format
 - o Analyse
- Formatting
 - o Formatting a Pivot Chart
 - o Renaming Fields
 - o Changing Chart Type
 - o Applying A Style
 - o Manually Formatting
- Advanced Pivot Chart Tasks
 - o Import Lesson XML
 - o Insert>PivotTable>Pivot Chart
 - o Insert>Slicer
 - o Slicer Tools/Options - Selection Pane

Power Pivot

- Advanced Pivot Table
 - o Features
 - o Creating Pivot Table/Pivot Chart
 - o Fields List Pane



- o Calculated Fields
- o Sorting/Filtering Pivot Data
- Power Pivot
 - o Enabling
 - o File>Options>Add Ins
 - o Importing Access & Excel Data
 - o More Additional
 - o Excel & Access Files
- Relationships
 - o Creating a Pivot Table with PP
 - o Module - Access & Excel
- Using Power Pivot
 - o Lesson - Access & Excel
 - o Combine in Power Pivot & Create Pivot

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