



Maximizing Pivot Table

Course Aims

This in-depth one-day course introduces to the powerful Microsoft Office Excel PivotTable feature, which organizes, summarizes, and analyzes your data to reveal its meanings. The participants will learn even more about the ins and outs of working with Microsoft Excel PivotTable reports and learn even more advanced ways to use Microsoft® Excel PivotTable® reports, including how to use formulas with report data.

Who should attend?

Aimed at information workers who need to create and manipulate more complex models using Excel Pivot Table to create reports easily

Productivity Gained

The participants will achieve productivity gain as follows:

- See why the PivotTable feature is so useful.
- Make sense out of data by creating a PivotTable report.
- Check your source data to ensure that it's correctly organized for good PivotTable report results.
- Figure out which data to put in row, column, or page areas on the report layout.
- Change the order in which items are sorted.
- Update the PivotTable report whenever the source data is revised.
- Change the type of calculation Excel uses to summarize data.
- Get more information out of your data by using more than one field in the same drop area.
- Group data to view a quarterly summary instead of a daily summary.
- Summarize data by using summary functions other than SUM, such as COUNT or MAX.
- Show data as a percentage of the total by using a custom calculation.
- Enter your own formula inside a PivotTable report by using a calculated field.

Brief Outline

- Module 1.** Make your data work for you
- Module 2.** Create a PivotTable report
- Module 3.** Not an expert? Not a problem
- Module 4.** PivotTable nitty-gritty
- Module 5.** Beyond the basics
- Module 6.** Sum it up another way
- Module 7.** More PivotTable calculations
- Module 8.** Using Pivot Table Calculations
- Module 9.** Using Multiple Ranges
- Module 10.** Creating Interactive Pivot Table for the Web
- Module 11.** Creating PivotChart and Interactive PivotTable

Course Coverage

Our problem based learning includes:

- Seven instructor led lessons
- Seven practice sessions for hands-on experience
- Seven short tests, conducted at the end of each lesson.
- Four drill lesson with four lab exercises

Level	Duration	Time
Basic	1 Day / 8 Hours	9:00 am to 5:30 pm



Maximizing Pivot Table

Pre-requisites

The participants attending this course must have the knowledge stated below:

- An intermediate user of Microsoft Excel 2002 or 2000 for at least 1 year

Detail Outline

Module 1. Make your data work for you

In this lesson, you'll find out how PivotTable reports make it all so easy: They compare, they reveal, they analyze, by displaying different views of data, turning data into information that makes sense.

Topics and Activities

- Ask the questions you choose
- Get the answers you want
- Test yourself

Module 2. Create a PivotTable report

In this lesson you'll meet the wizard. You'll learn how to drag selected data into the PivotTable layout area, and you'll see how the new view answers your questions about a list of sales figures in Excel.

Topics and Activities

- Determine what you need to know
- Meet the wizard
- The wizard reveals all
- The list to drag items from
- The layout area to drop items onto
- Create the PivotTable report view of your data
- Voila!
- Practice
- Test yourself

Module 3. Not an expert? Not a problem

In this lesson you'll learn why it's important to have well-organized source data from which to create a PivotTable report, and how to figure out which data to drop where.

Topics and Activities

- First, check your source data
- What goes where
- Secrets to success
- Practice
- Test yourself

Module 4. PivotTable nitty-gritty

In this lesson you'll learn the answers to these questions, you'll learn how to tweak the report to make it easier to read, and you'll learn a few cool PivotTable tricks.

Topics and Activities

- The riddle of the gray boxes
- Change the sort order
- Format numbers
- Get fresh data
- When Sum is not enough
- Practice
- Test yourself

Module 5. Beyond the basics

In this lesson, you'll learn how to group dates to show sales totals for all the salespeople for each quarter. Then you'll see how to pivot the report to show four quarters together for each salesperson

Topics and Activities

- Where to start
- Add another field
- Create a quarterly group
- Trade places to get a different view
- The ins and outs of row fields
- Practice
- Test yourself

Module 6. Sum it up another way

In this lesson you'll use the Count function to see how to figure out the number of sales made by each salesperson. You'll also learn how to use a custom calculation to show salesperson totals as a percentage of the total dollars sold

Topics and Activities

- Summarize numerical data differently
- When there's more than one data field
- Count the orders
- Format a PivotTable report
- Display numerical data as a percentage of the total dollars sold
- Practice
- Test yourself

Module 7. More PivotTable calculations

In this lesson you'll learn how to use a calculated field to get these figures. A calculated field, unlike the predefined custom calculations you learned about in the last lesson, is a formula that you create from scratch to find out whatever you want to know.

Topics and Activities

- Figure out the bonus percentage
- And the total is?
- Figure out the bonus amounts
- Add up the data from the report in cells outside of the report
- Practice
- Test yourself

Drills

Module 8. Using Pivot Table Calculations

- Adding Other Summary Fields
- Changing the Summary Function
- Creating a Custom Calculation
- Changing a Custom Calculation
- Creating a Calculated Field



Maximizing Pivot Table

- Creating a Calculated Item
- Labs - Using Pivot Table Calculations

Module 9. Using Multiple Ranges

- Selecting the Type of Page Fields
- Selecting Multiple Source Ranges
- Selecting Field1 Ranges
- Selecting Field2 Ranges
- Displaying the Pivot Table
- Renaming Custom Page Fields
- Using the Consolidated Table
- Labs - Using Multiple Ranges

Module 10. Creating PivotChart and Interactive PivotTable

- Creating a PivotChart Report
- Publishing PivotTable Reports to the Web

- Adding Fields to a PivotTable - Browser
- Using a PivotTable List
- Labs - Creating PivotChart and Interactive PivotTable

Module 11. PivotTable Tips & Tricks

- PivotTable report - Grouping Text Fields
- Automatically Refreshing a PivotTable Report
- PivotTable report - Grouping the Date Field by Week Number
- PivotTable report - Grouping the Date Field by Quarters in a Fiscal Reporting Year
- Automatic Report formatting using option buttons