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Microsoft Excel - Pivot Tables

GoSkills online course syllabus

Friday, May 3, 2024

Skill level
Beginner

Lessons
38

Accredited by
CPD

Pre-requisites
Excel - Basic

Versions supported
2016, 2019, 365

Video duration
3h 12m

Estimated study time
19h for all materials

Instructor
Ken Puls

The Very Basics

1 What is a PivotTable - and Why Do You Care?

PivotTables open up your world to quickly summarize data and build solutions that others can explore.

2 The PivotTable Life Cycle

Understanding how the life cycle of a PivotTable solution is different than an ad-hoc reporting solution.

3 Creating Your First PivotTable

Creating your first PivotTable is the first step to unlocking serious Excel power in data optimization.

4 Field Well Options

Determining the Field Well options you'd like to use to view your PivotTable data.

Sourcing Your Data

5 Source Data Best Practices

Setting up your data sets to ensure that they will be able to be consumed by a PivotTable.

6 Using Excel Ranges

Choosing between building quick and dirty PivotTables or future-proofing PivotTables for future updates.

7 Preparing Source Data

When you need to aggregate multiple tables or create new fields in order to display properly in a PivotTable.

8 Using External Data

Connecting to external data sources (such as databases), and pulling the data into Excel.

9 Managing Power Queries

Updating a Power Query solution to a new file path, allowing us to refresh the file with a click.

Laying Out the PivotTable

10 Totals and Sub-Totals

Use to turn totals and subtotals on/off where needed in your PivotTable.

11 Choosing PivotTable Layouts

Determining the basic layout you'd like to use to display your PivotTable data.

12 Grouping

Use to group different row or column fields together for a more logical display.

PivotTable Calculations

13 Aggregation

When you wish to show different aggregation on your PivotTable fields than what is provided by default.

14 Running Totals

When you need to display a running total on your PivotTable.

15 Percent of x Calculations

When you need to display a value as the % of another value on your PivotTable.

16 Difference From Calculations

When you need to display values that are a difference from another value in a PivotTable. This is very useful for showing growth/decline from previous periods.

17 Percentage Difference From Calculations

When you need to display values that are a percentage of difference from another value in a Pivot Table. This is very useful for showing growth/decline from previous periods.

18 Top and Bottom x Items

When you want to filter your PivotTable to show the top/bottom x items or top/bottom x% of items in the data set.

19 Calculated Fields
Understanding how to create calculated fields in a PivotTable.

20 Calculated Items
Understanding how to create calculated items in a PivotTable.

PivotTable Formatting

21 Value Field Formats
Various ways to display numbers in the values area of a PivotTable.

22 Preserving Cell Formats on Update
How to force a PivotTable to preserve cell formats and column widths when it is updated.

23 PivotTable Styles
Using pre-defined styles with a PivotTable.

24 Custom PivotTable Styles
Creating your own style to use with a PivotTable.

25 Conditional Formatting on PivotTables
Basics of applying conditional formats to a PivotTable.

Sorting

26 Basic Sorting
Basic sorting of row and column headers in a PivotTable.

27 Custom Sorting
Creating custom sort orders for a PivotTable.

28 Sorting Values
Sorting the values area of a PivotTable.

Filtering Data

29 Report Filters
Using Report Filters to narrow down results in a PivotTable.

30 Built-in Filter Controls
Using row and column filters to narrow down results in a PivotTable.

31 Slicers
Slicers are user-friendly filters for PivotTables.

32 Timelines
Timelines are date specific filters for PivotTables.

33 Filtering Multiple PivotTables
Filtering multiple PivotTables at once with Slicers.

Extracting Data

34 Show Details
Using Show Details to extract details from a summarized value.

35 GETPIVOTDATA
Using the GETPIVOTDATA function to extract specific fields from a PivotTable.

Data Visualization

36 Creating PivotCharts
Creating PivotCharts out of a PivotTable.

Finalization

37 Automating Refresh
Automating PivotTable refresh operations.

38 Pre-release Considerations
Items to consider before releasing your file to users.

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