goskills

# Microsoft Excel - Pivot Tables

GoSkills online course syllabus

Thursday, May 1, 2025

**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.

Go to GoSkills.com