



Mastering Excel 2016 Pivot Tables Course Overview

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Course Duration:

7 Hours / 1 Day

1 Pivot Table Fundamentals

- Why You Should Use a Pivot Table
- When to Use a Pivot table
- Anatomy of a Pivot Table

2 Preparing Data for Pivot Table Reporting

- Ensuring That data Is in a Tabular layout
- Avoiding Storing Data in Section Headings
- Avoiding Repeating Groups as Columns
- Eliminating Gaps and Blank Cells in the Data Source
- Applying Appropriate Type Formatting to Fields
- Summary of Good Data Source Design

3 How to Create a Basic Pivot Table

- Adding Fields to a Report
- Fundamentals of Laying Out a Pivot Table Report
- Adding Layers to a Pivot Table
- Rearranging a Pivot Table
- Creating a Report Filter
- Understanding the Recommended Pivot Table

4 Using Slicers

- Creating a Standard Slicer
- Creating a Timeline Slicer
- Keeping Up with Changes in the Data Source

- Saving Time with New Pivot Table Tools

5 Making Common Cosmetic Changes

- Applying a Table Style to Restore Gridlines
- Changing the Number Format to Add Thousands Separators
- Replacing Blanks with Zeros
- Changing a Field Name

6 Making Report Layout Changes

- Using the Compact Layout
- Using the Outline Layout
- Using the Traditional Tabular Layout
- Controlling Blank Lines, Grand Totals, and Other Settings
- Customizing a Pivot Table's Appearance with Styles and Themes
- Changing Summary Calculations
- Adding and Removing Subtotals
- Changing the Calculation in a Value Field

7 Automatically Grouping Dates

- Undoing Automatic Grouping
- Understanding How Excel 2016 Decides What to Group
- Grouping Date Fields Manually
- Including Years When Grouping by Months
- Grouping Date Fields by Week
- Grouping Numeric Fields
- Using the PivotTable Fields List

8 Sorting in a Pivot Table

- Sorting Customers into High-to-Low Sequence Based on Revenue

- Using a Manual Sort Sequence
- Using a Custom List for Sorting
- Filtering a Pivot Table: An Overview

9 Using Filters for Row and Column Fields

- Filtering Using the Check Boxes
- Filtering Using the Search Box
- Filtering Using the Label Filters Option
- Filtering a Label Column Using Information in a Values Column
- Creating a Top-Five Report Using the Top 10 Filter
- Filtering Using the Date Filters in the Label Drop-down

10 Filtering Using the Filters Area

- Adding Fields to the Filters Area
- Choosing One Item from a Filter
- Choosing Multiple Items from a Filter
- Replicating a Pivot Table Report for Each Item in a Filter
- Filtering Using Slicers and Timelines
- Using Timelines to Filter by Date
- Driving Multiple Pivot Tables from One Set of Slicers

11 Performing Calculations in Pivot Tables

- Introducing Calculated Fields and Calculated Items
- Creating a Calculated Field
- Creating a Calculated Item
- Managing and Maintaining

Pivot Table Calculations

12 Using Pivot Charts and Other Visualizations

- What Is a Pivot Chart?
- Creating a Pivot Chart
- Keeping Pivot Chart Rules in Mind
- Examining Alternatives to Using Pivot Charts