



Mastering Excel Pivot Tables 2013 Course Overview

Mastering Excel Pivot Table 2013

Course Duration:

6 Hours / 1 Day

1 Pivot Table Fundamentals

- What Is a Pivot Table?
- Why Should You Use a Pivot Table?
- When Should You Use a Pivot Table?
- The Anatomy of a Pivot Table
- Values Area
- Rows Area
- Columns Area
- Filters Area
- Pivot Tables Behind the Scenes
- Limitations of Pivot Table Reports

2 Creating a Basic Pivot Table

- Ensure Your Data Is in a Tabular Layout
- Avoid Storing Data in Section Headings
- Avoid Repeating Groups as Columns
- Eliminate Gaps and Blank Cells in Your Data Source
- Apply Appropriate Type Formatting to Your Fields
- Summary of Good Data Source Design
- Creating a Basic Pivot Table
- Adding Fields to the Report
- Adding Layers to Your Pivot Table
- Rearranging Your Pivot Table
- Creating a Report Filter
- Understanding the Recommended PivotTables Feature
- Using Slicers
- Creating a Standard Slicer
- Creating a Timeline Slicer
- Keeping Up with Changes in Your Data Source
- Changes Have Been Made to Your Existing Data Source

3 Customizing a Pivot Table

- Your Data Source's Range Has Been Expanded with the Addition of Rows or Columns
- Sharing the Pivot Cache
- Saving Time with New Pivot Table Tools
- Deferring Layout Updates
- Starting Over with One Click
- Relocating Your Pivot Table
- 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
- Making Report Layout Changes
- Using the New Compact Layout
- Using the Outline Form Layout
- Using the Traditional Tabular Layout
- Controlling Blank Lines, Grand Totals, and Other Settings
- Customizing the Pivot Table Appearance with Styles and Themes
- Customizing a Style
- Modifying Styles with Document Themes
- Changing Summary Calculations
- Understanding Why One Blank Cell Causes a Count
- Using Functions Other Than Count or Sum
- Adding and Removing Subtotals
- Suppress Subtotals When You Have Many Row Fields
- Adding Multiple Subtotals for One Field
- Changing the Calculation in a Value Field
- Showing Percentage of Total
- Using % Of to Compare One Line to Another Line
- Showing Rank
- Tracking Running Total and Percent of Running Total
- Display Change from a Previous Field

- Tracking Percent of Parent Item
 - Track Relative Importance with the Index Option
- #### 4 Grouping, Sorting, and Filtering Pivot Data
- Grouping Pivot Fields
 - Grouping Date Fields
 - Including Years When Grouping by Months
 - Grouping Date Fields by Week
 - Ungrouping
 - Grouping Numeric Fields
 - Using the PivotTable Fields List
 - Docking and Undocking the PivotTable Fields List
 - Rearranging the PivotTable Fields List
 - Using the Areas Section Drop-Downs
 - 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 the Pivot Table: An Overview
 - Using Filters for Row and Column Fields
 - Filtering Using the Check Boxes
 - Filtering Using the Search Box
 - Filtering Using the Label Filters
 - 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
 - Filtering Using the Filters Area
 - Adding Fields to the Filters Area
 - Choosing One Item from a Filter
 - Choosing Multiple Items from a Report 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



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5 Performing Calculations Within Your Pivot Tables

- Introducing Calculated Fields and Calculated Items
- Method 1: Manually Add the Calculated Field to Your Data Source
- Method 2: Use a Formula Outside Your Pivot Table to Create the Calculated Field
- Method 3: Insert a Calculated Field Directly into Your Pivot Table
- Creating Your First Calculated Field
- Creating Your First Calculated Item
- Understanding the Rules and Shortcomings of Pivot Table Calculations
- Remembering the Order of Operator Precedence
- Using Cell References and Named Ranges
- Using Worksheet Functions
- Using Constants
- Referencing Totals
- Rules Specific to Calculated Fields
- Rules Specific to Calculated Items
- Managing and Maintaining Your Pivot Table Calculations
- Editing and Deleting Your Pivot Table Calculations
- Changing the Solve Order of Your Calculated Items
- Documenting Your Formulas

6 Using Pivot Charts and Other Visualizations

- What Is a Pivot Chart...Really?
- Creating Your First Pivot Chart
- Keeping Pivot Chart Rules in Mind
- Changes in the Underlying Pivot Table Affect Your Pivot Chart
- The Placement of Data Fields in Your Pivot Table Might Not Be Best Suited for Your Pivot Chart
- A Few Formatting Limitations Still Exist in

Excel 2013

- Examining Alternatives to Using Pivot Charts
- Method 1: Turn Your Pivot Table into Hard Values
- Method 2: Delete the Underlying Pivot Table
- Method 3: Distribute a Picture of the Pivot Chart
- Method 4: Use Cells Linked Back to the Pivot Table as the Source Data for Your Chart
- Using Conditional Formatting with Pivot Tables
- Creating Custom Conditional Formatting Rules

7 Analyzing Disparate Data Sources with Pivot Tables

- Using Multiple Consolidation Ranges
- Creating a Multiple Consolidation Pivot Table
- Analyzing the Anatomy of a Multiple Consolidation Ranges Pivot Table
- The Row Field
- The Column Field
- The Value Field
- The Page Fields

8 Pivot Table data analysis using a Data Model in Excel 2013

- Using the Internal Data Model
- Building Out Your First Data Model
- Managing Relationships in the Data Model
- Adding a New Table to the Data Model
- Removing a Table from the Data Model
- Create a New Pivot Table Using the Data Model
- Limitations of the Internal Data Model
- Building a Pivot Table Using External Data Sources
- Building a Pivot Table with Microsoft Access Data