

Transform flat datasets into powerful, dynamic reports with Pivot Table Data & Chart Analysis, a live instructor-led course built to turn Excel users into confident analysts and storytellers. This hands-on class walks participants through the full cycle of Pivot Table mastery—from sourcing and preparing raw data to layering in complex comparisons, filters, and time-based insights. You'll explore how to organize data using rows, columns, values, and filters, then apply sophisticated features like calculated fields, value groupings, and dynamic summaries such as YoY change or percentage of total. The course covers visual filtering tools including Slicers and Timelines for interactive control, then moves into Pivot Chart creation to bring your findings to life. Students also learn layout customization, KPI structuring, and conditional formatting to elevate clarity and presentation. Whether you're managing sales trends, performance reviews, or boardroom dashboards, this course gives you the confidence and structure to analyze and present data clearly—without writing a single line of code.

PREPARING DATA SOURCES FOR PIVOTING

- Identify structured vs. unsuitable source data
- Clean data and convert to Excel Table format
- Verify headers, remove blanks, and eliminate duplicates

CREATING AND MODIFYING PIVOT TABLES

- Build Pivot Tables from scratch or templates
- Drag fields into rows, columns, and values areas
- Add or remove fields and rearrange layout options

FIELD TOOLS, LAYOUTS & UTILITY PANELS

- Use the Field List panel and configuration settings
- Modify layout styles: Compact, Outline, Tabular
- Control subtotals, grand totals, and report design

GROUPING AND BUNDLING TECHNIQUES

- Group dates by year, quarter, month, or day
- Bundle numeric ranges or custom value intervals
- Group text fields under new categories

SUMMARY CALCULATIONS AND METRICS

- Apply SUM, COUNT, AVERAGE, MAX, MIN
- Use product, variance, and standard deviation
- Display multiple subtotal levels across groups

CALCULATED FIELDS, ITEMS & ADVANCED COMPARISON

- Insert calculated fields and calculated items
- Run comparisons: difference from, % difference from
- Apply running totals, ranking, and base-field calculations

FILTERING, SORTING & VISUAL CONTROLS

- Filter by values, ranges, dates, or Top N conditions
- Sort by row or column fields—primary to tertiary
- Use slicers and timelines for point-and-click filtering

FORMATTING FOR CLARITY & PRESENTATION

- Apply styles, shading, and color banding to pivots
- Use conditional formatting within pivot tables
- Hide buttons, manage white space, and optimize layout

PIVOT CHARTS & VISUAL ANALYTICS

- Create charts: column, bar, line, pie, area, and more
- Sync chart visuals with Pivot Table changes
- Customize chart elements for clear visual storytelling

PRINTING & EXPORTING RESULTS

- Print pivot tables and charts with control over layout
- Export output to PDF or optimized print format
- Preview print results and manage pagination options