

Learn how to make Excel pivot tables that turn disorganized lists into interactive, decision-ready reports. Start by converting raw data into Excel tables for faster updates, easier expansion, and seamless pivot table refreshes. Then explore how to build pivot tables using rows, columns, built-in summaries, and calculated fields. Add slicers, timeline filters, and tabular formatting to compare, roll up, or drill down on business details. Discover how pivot tables simplify profit analysis, markup and margin percentages, running totals, and percent of parent calculations. Visualize insights with pivot charts, custom layouts, and collapsible views to spotlight KPIs, year-over-year trends, and top performers. Use field tools, ribbon options, and layout panels to control subtotals, view modes, and total calculations. Highlight key metrics with clean formatting, banded rows, and conditional logic. Compare KPIs with YoY, QoQ, and MoM changes, and evaluate profitability using percent of column or parent. Apply filters by nested order, category, or Top N ranking. Insert slicers and timelines for intuitive filtering, collapse or expand regions by group, and manage subtotal layers across views. Add dynamic charts, adjust axes and labels, and customize print layouts with export-ready formatting. You'll also learn how to use pivot tables with external sources, dynamic ranges, and real-world datasets—gaining the power to uncover hidden patterns and build polished, executive-level reports without writing formulas. Whether you're a data pro or a first-time analyst, this course gives you the tools and confidence to turn raw Excel data into meaningful decisions.

### PREPARING DATA SOURCES FOR PIVOTING

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

### CREATING AND MODIFYING PIVOT TABLES

- Build PivotTables from scratch or start from templates
- Drag fields into rows, columns, filters, and values areas
- Rearrange layout using simple drag-and-drop tools

### FIELD TOOLS, LAYOUTS & UTILITY PANELS

- Use the Pivot Field List and ribbon controls
- Switch between Compact, Outline, and Tabular views
- Manage subtotals, grand totals, and layout options

### GROUPING AND BUNDLING TECHNIQUES

- Group dates by day, month, quarter, or year
- Create numeric intervals for ranges like price bands
- Combine text fields into new custom categories

### SUMMARY CALCULATIONS AND METRICS

- Use SUM, COUNT, AVERAGE, MAX, and MIN
- Add totals for product, variance, or standard deviation
- Show multiple subtotal layers across row/column groups

### CALCULATED FIELDS, ITEMS & ADVANCED COMPARISON

- Add new fields using formula-based calculations
- Compare values with difference from and % of base field
- Include running totals, rankings, and nested logic

### FILTERING, SORTING & VISUAL CONTROLS

- Filter values by category, range, or Top N ranking
- Apply sort levels by row, column, or nested order
- Insert Slicers and Timelines for intuitive filtering

### FORMATTING FOR CLARITY & PRESENTATION

- Apply clean styles, bold headers, and banded rows
- Use conditional formatting to spotlight key metrics
- Hide expand buttons and clean up white space

### PIVOT CHARTS & VISUAL ANALYTICS

- Add dynamic charts linked to PivotTable data
- Explore column, bar, line, pie, and area types
- Customize chart titles, axes, labels, and legends

### ROLLING UP, DRILLING DOWN & COLLAPSING VIEWS

- Collapse product detail to focus on categories
- Drill down on specific regions or segments
- Roll up values to get clean summaries by level

### COMPARING KPI'S & TIME-BASED TRENDS

- Create YoY, QoQ, and MoM change comparisons
- Visualize changes in profit, margin, and markup %
- Use base fields for period-over-period calculations

### ANALYZING PROFITABILITY & PERCENT RELATIONSHIPS

- Display % of Parent or % of Column Total
- Evaluate margin %, markup %, and profitability
- Compare regions, reps, or products side-by-side

### PRINTING, SHARING & EXPORTING RESULTS

- Control printed layout for pivot tables and charts
- Export views to PDF or use custom print settings
- Preview and adjust pagination before final output