

Explore how to use Pivot Tables to help make the most out of your data by applying its powerful summarization, charting, and reporting tools. Identify what constitutes for suitable data to base your Pivot Tables on. Learn why converting your data to table format is beneficial to successful reporting. Learn how to add new and missing data either by adding fields to the worksheet or directly to the pivot table realm using calculated fields and items. Understand the utility tools used in creating Pivot Tables and Pivot Charts. Create Pivot Tables from scratch or through the use of preferred templates. Learn how to group and bundle your pivot table data including dates, values, and text. Apply a variety of sorting techniques and filtering tools including advanced slicer and timeline filters. Insert powerful summary calculations and custom row/column calculations and custom comparative calculations. Format pivot tables and pivot charts using traditional tools as well as advanced conditional formatting rules. Create a variety of pivot charts including column, bar, line, area, pie and more. Learn how to perfectly print pivot tables and pivot charts, with options.

PROCURE PIVOT TABLE DATA SOURCES

- Identifying Suitable Pivot Table Data Sources.
- Excel Worksheets and Data Tables as Sources.
- Other Data Sources Like CSV, SQL, Access, ODB.

PREPARE DATA FOR PIVOTING

- Convert Worksheet Data to Data Table Format.
- Verify the Existence of Headings or Field Names.
- Eliminate Completely Blank Rows and Columns.
- Remove Unwanted and Duplicate Records.

PIVOT TABLE BUILDING UTILITY TOOLS

- Field List Panel – Rows, Columns and Value Slots.
- Option Settings – Layout, Totals, Display & Print.
- Group Settings, Calculated Fields, and Items.
- Report Layouts – Tabular, Online and Compact.
- Calculate and Display of Grand and Subtotals.

CREATE PIVOT TABLES

- Create Pivot Table from Preferred Templates.
- Pivot Table Creation from Scratch or Blank.
- Learn to Activate and De-Activate Fields Panel.
- Add Pivot Row/Column Headings Using Slots.
- Insert Summaries Dragging Fields to Value Slots.
- Modify the Pivot Table Design by Rearranging Fields and/or Adding/Removing Fields.

ADD NEW FIELDS AND MISSING DATA

- Add New Fields Directly to the Worksheet Data.
- Add New Fields Directly to the Pivot Table by Adding Calculated Fields and Calculated Items.

PIVOT GROUPING AND BUNDLING

- Group Dates by Year, Quarters, Month and Days.
- Group Text Under New Headings Effortlessly.
- Bundle Date Items Like “9/15/2020 – 9/22/2020”.
- Bundle Number Items Like “75000 – 85000”.
- Aggregate Field Data with Calculated Items Tool.

SUMMARY CALCULATIONS

- Calculate Sum, Count and Average.
- Determine and Display Max and Min Values.
- Display Product and Variance Calculations.
- Calculate the Standard Deviation.
- Display Multiple Subtotals (very cool).

CUSTOM ROW COLUMN CALCULATIONS

- **% of Grand Total** – % of Grand Total.
- **% of Column Total** – % of Columns Series Total.
- **% of Row Total** – % of Row Category Total.
- **% of** – % of the Base Field.

CUSTOM PARENT ROW COLUMN CALCULATIONS

- **% of Parent Row Total** – % of Parent Subtotal.
- **% of Parent Column Total** – % of P Column Total.
- **% of Parent Total** – % of Row Total Base Field.

CUSTOM CALCULATIONS – COMPARITIVE AND RANK

- **Difference From** – Difference Between Values.
- **% Difference From** – % Change Between Values.
- **Running Total In + %** – Running Totals and %age.
- **Rank Small to Large to Small** – Ranking Values.
- **Index** – Calculate Most Significant Value in List.

SORTING AND FILTERING

- Sort Pivot Tables with Row/Column Sort Buttons.
- Carry Out Primary, Secondary and Tertiary Sorts.
- Filter Pivots with Row/Column Filter Buttons.
- Filter by Dates, Values, Ranges & Top/Bottom N.
- Filter with the Embedded Field Filter Slot.

SLICER AND TIMELINE FILTERING

- Use Slicer Filters for Advanced Visual Filtering.
- Create Dashboard Displays with Slicer Filters.

FORMATTING PIVOT TABLES

- Hide Field Headers / Drill Buttons for Sleek Look.
- Format Using Pivot / Outside Formatting Tools.
- Set Format Styles with Color, Borders & Shading.
- Applying Row/Column Headers & Color Banding.
- Add Conditional Formatting to Underscore Info.
- Manage Subtotals and Grand Totaling Elements.
- Add Blank Rows or Report White Space.
- Apply the Auto Layout (Autofit) Option to Quickly Optimize the Pivot's Overall Structure.

PIVOT CHARTS

- Create a Variety of Charts and Graphs including Column, Bar, Line, Pie, Area and More.
- Add, Change and Modify Many Chart Elements.

PRINTING PIVOT TABLES AND PIVOT CHARTS

- Learn What's Needed to Perfectly Print Pivot Tables and Pivot Charts.
- Print Tables and Charts to Acrobat PDF Files.