

# Microsoft Excel - Pivot Tables

GoSkills online course syllabus

Tuesday, July 16, 2024

**Skill level**

Beginner

**Lessons**

38

**Accredited by**

CPD

**Pre-requisites**

[Excel - Basic](#)

**Versions supported**

2016, 2019, 365

**Video duration**

3h 12m

**Estimated study time**

19h for all materials

**Instructor**

Ken Puls

## The Very Basics

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- 1** **What is a PivotTable - and Why Do You Care?**  
PivotTables open up your world to quickly summarize data and build solutions that others can explore.
- 2** **The PivotTable Life Cycle**  
Understanding how the life cycle of a PivotTable solution is different than an ad-hoc reporting solution.
- 3** **Creating Your First PivotTable**  
Creating your first PivotTable is the first step to unlocking serious Excel power in data optimization.
- 4** **Field Well Options**  
Determining the Field Well options you'd like to use to view your PivotTable data.

## Sourcing Your Data

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- 5** **Source Data Best Practices**  
Setting up your data sets to ensure that they will be able to be consumed by a PivotTable.
- 6** **Using Excel Ranges**  
Choosing between building quick and dirty PivotTables or future-proofing PivotTables for future updates.
- 7** **Preparing Source Data**  
When you need to aggregate multiple tables or create new fields in order to display properly in a PivotTable.

**8** Using External Data  
Connecting to external data sources (such as databases), and pulling the data into Excel.

**9** Managing Power Queries  
Updating a Power Query solution to a new file path, allowing us to refresh the file with a click.

## Laying Out the PivotTable

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**10** Totals and Sub-Totals  
Use to turn totals and subtotals on/off where needed in your PivotTable.

**11** Choosing PivotTable Layouts  
Determining the basic layout you'd like to use to display your PivotTable data.

**12** Grouping  
Use to group different row or column fields together for a more logical display.

## PivotTable Calculations

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**13** Aggregation  
When you wish to show different aggregation on your PivotTable fields than what is provided by default.

**14** Running Totals  
When you need to display a running total on your PivotTable.

**15** Percent of x Calculations  
When you need to display a value as the % of another value on your PivotTable.

**16** Difference From Calculations  
When you need to display values that are a difference from another value in a PivotTable. This is very useful for showing growth/decline from previous periods.

**17** Percentage Difference From Calculations  
When you need to display values that are a percentage of difference from another value in a Pivot Table. This is very useful for showing growth/decline from previous periods.

**18** Top and Bottom x Items  
When you want to filter your PivotTable to show the top/bottom x items or top/bottom x% of items in the data set.

**19** **Calculated Fields**  
Understanding how to create calculated fields in a PivotTable.

**20** **Calculated Items**  
Understanding how to create calculated items in a PivotTable.

## PivotTable Formatting

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**21** **Value Field Formats**  
Various ways to display numbers in the values area of a PivotTable.

**22** **Preserving Cell Formats on Update**  
How to force a PivotTable to preserve cell formats and column widths when it is updated.

**23** **PivotTable Styles**  
Using pre-defined styles with a PivotTable.

**24** **Custom PivotTable Styles**  
Creating your own style to use with a PivotTable.

**25** **Conditional Formatting on PivotTables**  
Basics of applying conditional formats to a PivotTable.

## Sorting

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**26** **Basic Sorting**  
Basic sorting of row and column headers in a PivotTable.

**27** **Custom Sorting**  
Creating custom sort orders for a PivotTable.

**28** **Sorting Values**  
Sorting the values area of a PivotTable.

## Filtering Data

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**29** Report Filters  
Using Report Filters to narrow down results in a PivotTable.

**30** Built-in Filter Controls  
Using row and column filters to narrow down results in a PivotTable.

**31** Slicers  
Slicers are user-friendly filters for PivotTables.

**32** Timelines  
Timelines are date specific filters for PivotTables.

**33** Filtering Multiple PivotTables  
Filtering multiple PivotTables at once with Slicers.

## Extracting Data

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**34** Show Details  
Using Show Details to extract details from a summarized value.

**35** GETPIVOTDATA  
Using the GETPIVOTDATA function to extract specific fields from a PivotTable.

## Data Visualization

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**36** Creating PivotCharts  
Creating PivotCharts out of a PivotTable.

## Finalization

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**37** Automating Refresh  
Automating PivotTable refresh operations.

**38** Pre-release Considerations  
Items to consider before releasing your file to users.

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