

Excel Tables & PivotTables

Duration:

Half-day Course

Objectives:

By the end of this workshop delegates will have gained an in-depth knowledge and experience of Tables, PivotTables and PivotCharts. The workshop will also look at some supporting tools, such as Conditional Formatting which can help when using PivotTables.

Pre-Requisites:

Delegates should have experience of using Excel to an intermediate level; ideally with knowledge of sorting and filtering data in lists.

Content:

Tables:

- Why are Tables important when creating a PivotTable?
- Turning a list into a 'Table'
- Creating a 'total row'
- Adding records to the Table
- Sorting by custom list

Creating a PivotTable:

- Positioning the fields
- Filtering data
- Updating the PivotTable
- Sorting data in a PivotTable
- Formatting values

Grouping & Calculating in a PivotTable:

- Grouping by date, value & text
- Collapsing & expanding groups
- Changing the calculation method

Calculated Fields & Items:

- Creating a calculated field
- Creating a calculated item

PivotCharts

- Creating a PivotChart from a PivotTable
- Move to a separate sheet
- Filtering the PivotChart

Using an External Data Source:

- Importing data from an Access table
- Enabling the content & updating the PivotTable
- Combining data from separate worksheets

Method:

Trainer-led course with hands-on experience.