

## Course Description

This course is designed for students who wish to summarize and organize data in a way that can be meaningfully presented to others. This leads to data-driven business decisions that have a better chance for success for everyone involved.

## Learning Objectives

- Prepare data for PivotTable reporting and create PivotTables from various data sources
- Analyze data by using PivotTables
- Work with PivotCharts

### Preparing Data and Creating PivotTables

- Prepare Data
  - Local Data Sources
  - Transactional Data
  - Clean Data
  - Duplicate Data
  - Gap and Blank Cell Considerations
- Create a PivotTable from a Local Data Source
  - PivotTables
  - Pivoting
  - The Create PivotTable Dialog Box
  - The Recommend PivotTables Dialog Box
  - The PivotTable Field Task Pane
  - The PivotTable Tools Contextual Tab
  - Start with Questions, End with Structure
- Create a PivotTable from Multiple Data Sources
  - The Excel Data Model
  - Named Tables
  - The Create Relationships Dialog Box
  - The Manage Relationships Dialog Box
- Create a PivotTable from an External Data Source
  - Limitations of Excel as a Database
  - External Data Sources
  - The Select Data Source Window
  - The Select Table Dialog Box
  - The Import Data Dialog Box
  - The Data Connection Wizard
  - The Existing Connections Dialog Box

### Analyzing Data by Using PivotTables

- Summarize PivotTable Data
  - The Value Field Settings Dialog Box
  - The show Values As Tab
  - The Insert Calculated Field Dialog Box
- Organize PivotTable Data
  - Sorting
  - The Expand and Collapse Feature
  - The Group and Ungroup Feature
  - The Grouping Dialog Box
- Filter PivotTable Data
  - The FILTERS Area
  - Manual Filters
  - Slicers
  - The Insert Slicers Dialog Box
  - The Slicer Tools Contextual Tab
  - Timelines
  - The Insert Timelines Dialog Box
  - The Timeline Tools Contextual Tab
  - The Filter Connections Dialog Box
  - The Quick Explore Feature
- Format a PivotTable
  - Subtotals and Grand Totals
  - Report Layout and Blank Rows
  - Style Options
  - Styles
  - The New PivotTable Style Dialog Box
- Refresh and Change PivotTable Data
  - The Refresh Menu
  - The Change PivotTable Data Source Dialog Box
  - The Connection Properties Dialog Box

### Working with PivotCharts

- Create a PivotChart
  - PivotCharts
  - The Insert Chart Dialog Box
  - Chart Types
  - Recommended PivotCharts
- Manipulate PivotChart Data
  - The PivotChart Fields Task Pane
  - The PivotChart Tools Contextual Tab
  - Field Buttons
- Format a PivotChart
  - Chart Elements
  - The PivotChart Tools Design and Format Tabs
  - The Format Task Pane
  - Chart Formatting Buttons