

EXCEL WORKSHOP – PIVOT TABLES

PRESENTED BY FINANCIAL EXECUTIVES INTERNATIONAL – DALLAS CHAPTER

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PIVOT TABLES: BASIC FEATURES

CHAPTER 01 - LEARNING GOALS

- PREPARING FOR A PT
- CREATING AN EXCEL TABLE
- EXCEL TABLE FEATURES

CHAPTER 02 – CREATING A PT

- CREATING LAYOUT
- ADDING FIELDS
- CHANGING LAYOUT
- ADDING MORE FIELDS
- MOVING FIELDS
- CREATE A CHART

CHAPTER 03 – MODIFY A PT

- CHANGING PT: CLEARING A PT
- CHANGING PT: ADDING FIELDS TO SPECIFIC AREAS
- ADD REPORT FILTER
- ADD REPORT FILTER: CHG THE FILTER
- ADD REPORT FILTER: FILTER FOR MULTIPLE ITEMS
- ADD REPORT FILTER: REMOVE THE FILTER
- UPDATE A PT
- UPDATE A PT: CHANGE SOURCE DATA
- UPDATE A PT: VIEW NEW DATA
- CHANGE SUMMARY FUNCTION
- APPLY A PT STYLE (SKIPPED)
- DELETE A PT

CHAPTER 04 – SUMMARIZE THE DATA

- USE SUMMARY FUNCTIONS
- USE SUMMARY FUNCTIONS: SHOW MULTIPLE VALUE FIELDS
- USE SUMMARY FUNCTIONS: CHANGE VALUE FIELD HEADINGS
- USE SUMMARY FUNCTIONS: SHOW MULTIPLE SUMMARIES FOR ONE FIELD
- GRAND TOTALS: SHOW OR HIDE
- SUBTOTALS: SHOW OR HIDE
- SUBTOTALS: ABOVE OR BELOW
- SUBTOTALS: CHANGE FUNCTION

- SUBTOTALS: CREATE ADDNL SUBTOTALS
- GROUPING & UNGROUPING: NUMBERS
- GROUPING: DATES
- GROUPING: SELECTED ITEMS

CHAPTER 05: FORMATTING

- CONTROLLING REPORT LAYOUT: OUTLINE
- CONTROLLING REPORT LAYOUT: TABULAR
- CONTROLLING REPORT LAYOUT: COMPACT
- ADDING BLANK ROWS
- SKIP REMAINDER

CHAPTER 06: SORTING & FILTERING

- REPORT FILTERS: ADDING
- REPORT FILTERS: ADDING MULTIPLE
- REPORT FILTERS: CHANGE ORDER
- REPORT FILTERS: ARRANGING
- REPORT FILTERS: CLEARING
- LABELS: MOVING LABEL TO NEW POSITION
- LABELS: USING COMMANDS TO MOVE LABELS
- LABELS: MOVING LABELS BY TYPING
- SORTING LABELS: RIBBON COMMAND
- SORTING LABELS: CONTEXT MENU
- SORTING LABELS: HEADING DROP DOWN LIST
- SORTING VALUES: SMALLEST TO LARGEST
- SORTING VALUES: LARGEST TO SMALLEST
- SORTING VALUES: GRAND TOTAL ROW
- SORTING VALUES: LEFT TO RIGHT
- SORTING AUTOMATICALLY: WHEN PT CHANGES
- SORTING AUTOMATICALLY: PREVENTING AUTO SORT
- SORTING AUTOMATICALLY: RESTORING AUTO SORT
- SORTING LABELS: CREATE A CUSTOM LIST
- SORTING LABELS: USING A CUSTOM LIST
- SORTING LABELS: WITHOUT USING A CUSTOM LIST
- FILTERING ROW & COLUMN LABELS
- FILTERING ROW & COLUMN LABELS: FILTER FOR BEGINS WITH
- FILTERING ROW & COLUMN LABELS: FILTER FOR CONTAINS
- VIEWING FILTER & SORT INFORMATION
- FILTERS: REMOVING
- FILTERING VALUES: FOR ROW FIELDS
- FILTERING VALUES: FOR COLUMN FIELDS
- FILTERING FOR A DATE RANGE: CLEARING FILTERS

- FILTERING FOR A DATE RANGE: A SPECIFIC DATE RANGE
- FILTERING FOR A DATE RANGE: A DYNAMIC DATE RANGE
- FILTERING: MANUAL
- FILTERING: MANUAL INCLUDE NEW ITEMS
- FILTERING: BY SELECTION
- TOP & BOTTOM ITEMS: TOP ITEMS
- TOP & BOTTOM ITEMS: BOTTOM ITEMS
- TOP & BOTTOM ITEMS: TOP SUM

CHAPTER 07: CREATING PT FROM EXTERNAL DATA

- SKIP FOR NOW

CHAPTER 08: UPDATING A PT

- UPDATING AN EXCEL TABLE
- UPDATING AN EXCEL DATA SOURCE
- REFRESH ALL PIVOT TABLES IN A WORKBOOK
- RETAINING DELETED ITEMS
- CHANGE AN ACCESS DATA SOURCE
- REFRESH PIVOT TABLE REGULARLY
- SAVING SOURCE DATA WITH THE FILE

CHAPTER 09: CREATE CALCULATIONS IN A PIVOT TABLE

- CALCULATION: DIFFERENCE FROM
- CALCULATION: % OF
- CALCULATION: % DIFFERENCE FROM
- CALCULATION: RUNNING TOTAL IN
- CALCULATION: % OF ROW
- CALCULATION: % OF COLUMN
- CALCULATION: % OF TOTAL
- CALCULATION: USING INDEX
- FORMULAS: CALCULATED FIELD: CREATE
- FORMULAS: CALCULATED FIELD: EDIT
- FORMULAS: CALCULATED FIELD: CREATE COMPLEX
- FORMULAS: CALCULATED FIELD: USE IN FORMULA
- FORMULAS: CALCULATED FIELD: UNDERSTANDING
- FORMULAS: CALCULATED FIELD: DELETING
- FORMULAS: CALCULATED FIELD: CALCULATED ITEM: CREATE
- FORMULAS: CALCULATED FIELD: CALCULATED ITEM: EDIT
- FORMULAS: CREATE A LIST
- FORMULAS: CHANGE SOLVER ORDER