

# Excel PivotTables

**Audience** This course is appropriate for users who know the spreadsheet techniques of Excel 2003. Users should be able to use the basics of Excel and in addition know how to create absolute and mixed cell references; use functions; work with multiple sheets in a workbook; freeze titles; set print titles and page breaks; create names; link worksheets and workbooks. It would be helpful, but not required, to have taken the Excel 2003 Level 2.

**Description** The course uses a combination of lecture, hands-on practice, and independent exercises to familiarize students with list design, PivotTables and PivotCharts in Excel 2003. Students will first learn how to create a list suitable for use in PivotTables. Then, students will learn to take the information from a list (or spreadsheet) and create PivotTables and PivotCharts. These tools provide the Excel user with methods to quickly analyze information for decision making. The PivotTable rearranges and summarizes the data from a database or spreadsheet automatically into categories chosen by the user. For example, a list of customers and the products they buy can be analyzed to display product totals by customer or by region. With a few minor changes to the PivotTable, customer purchases can be analyzed by product. PivotCharts display these analyses in a chart format.

**Objectives** After completing the class, students should be able to:

- create a list suitable for use in PivotTables,
- edit data through the data form or the worksheet,
- sort and number a list,
- create a PivotTable,
- edit and total a PivotTable,
- change calculations and format in a PivotTable,
- group and hide data in a PivotTable,
- create a PivotChart.

**Length** ½ day

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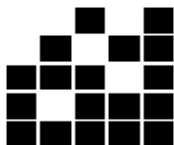
## I. Creating a List

- A. Recognizing a List
- B. Creating a List
- C. Editing a List using Data Form
- D. Formulas in a List
- E. Sorting a List

## F. Numbering the List

## II. PivotTables and PivotCharts

- A. What is a PivotTable or PivotChart
- B. Creating a PivotTable



- C. Modifying a PivotTable using the Wizard
- D. Modifying a PivotTable with the Mouse
- E. Changing PivotTable Field Heading and Calculation
- F. Exercise: Analyze Travel Data using PivotTables
- G. Hiding and Showing PivotTable Fields
- H. Grouping and Sorting PivotTable Fields
- I. Customizing PivotTable Field Calculations
- J. Exercise: Formatting and Changing Calculations in a PivotTable; Filtering a PivotTable for additional analysis
- K. Creating a PivotChart
- L. Exercise: Using a PivotChart to Analyze Travel and Product data