All You Need to Know About Excel Pivot Table - Versions 2007-2016

Description: In this informative webcast, Excel expert David H. Ringstrom, CPA, focuses on the basics of Excel pivot tables. Pivot tables empower users to create reports quickly and easily from complex data using only their mouse. Like many Excel features, pivot tables have nuances that can trip up the unaware user, so David shares tricks and traps of working with pivot tables to help ensure the reports you create are always accurate. During the presentation, he also shows Excel 2013 and 2016 users how to implement the Recommended PivotTables feature.

David teaches from the version of Excel in use by the majority of attendees, but he explains any differences in Excel 2007, 2010, 2013, and 2016. His webcasts are fast-paced, and attendees often are surprised at the amount of ground he covers in a session. He welcomes participants’ questions, so come ready to pick his brain. David's detailed handouts serve as reference tools you can fall back on after participating in one of his webcasts. In addition, he provides an Excel workbook that includes a majority of the examples he uses during each session.

Topics Covered:

- Add fields to pivot tables.
- Avoid disabled features by converting Excel 97–2003 files to modern workbook formats with ease.
- Avoid frustration by understanding the nuances of pivot table formatting.
- Determine at a glance if you're seeing all available data for the fields included on a pivot table or not.
- Discover how pivot tables differ from worksheet formulas and learn the importance of the Refresh command.
- Drill down into numbers with a double-click—or prevent other users from being able to do so.
- Get past the “PivotTable field name already exists” prompt once and for all.
- Identify the requirements of ideal data sets to be analyzed within your pivot tables.
- Initiate a pivot table from a list of data.
- Learn how to expand and collapse pivot table elements, thereby avoiding information overload.
- Learn the nuances associated with subtotaling data within a pivot table.
- See multiple ways to remove fields from a pivot table.
- Stave off frustration by filling blank cells within any columns that contain numbers with zeros before you create pivot tables.
- Understand the differences in pivot table interfaces between Excel 2010 and earlier and Excel 2013 and later.
- Understand the nuances of formatting numbers within pivot tables.
- Understand the nuances of sorting pivot tables.
- Understand why pivot tables sometimes display amounts as text or count amounts instead of summing.
- Use the Report Filter command to create breakout tables and dig deeper into the numbers.

CPE Credits - 1.5 / Field of Study - Specialized Knowledge & Applications

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