

Excel Pivot Tables

Turn raw data into interactive dashboards in one day.

◆ THIS CLASS AT A GLANCE

Pivot Tables are Excel's most powerful reporting tool — and most users barely scratch the surface. In one day you will go from basic summaries to interactive dashboards your management team will actually use.

- Build Pivot Tables from any dataset — fast, clean, and structured
- Use Slicers and Timelines to slice data interactively
- Create Calculated Fields and group data into custom buckets
- Build Pivot Charts that update automatically as you slice
- Design dashboard-style reports that look professional
- Master GETPIVOTDATA for advanced linked reporting

Excel Pivot Tables

C O U R S E O V E R V I E W

If you spend hours wrestling with large datasets — only to summarize them with manual SUMIFS formulas — Pivot Tables are about to give you that time back.

You will spend the day building Pivot Tables, Pivot Charts, Slicers, Timelines, Calculated Fields, and complete interactive dashboards. By 5:00 PM you will have skills you can put to work tomorrow.

HOW WE TEACH

Your instructor is a working Excel professional, not a presenter reading from slides.

Public classes have up to 6 students for maximum individual attention. Private team training scales to fit your group, however large.

Every concept is taught, then immediately practiced. You leave with the muscle memory, not just the notes.

WHO SHOULD ATTEND

Users with a strong Excel foundation who want to master data analysis with Pivot Tables.

Team members who spend too much time wrestling with large datasets and not enough time acting on them.

Anyone who needs to turn raw data into clear, interactive reports leadership will actually use.

Teams who need a consistent dashboarding standard across the office.

WHAT YOU TAKE HOME

- Printed class binder with step-by-step labs and challenge exercises.
- Microsoft Excel exercise files — 1-year access included.
- Double-sided laminated keyboard shortcut guide.
- Certificate of completion plus 8 CPE credits (TSBPA accredited).

C L A S S E S S E N T I A L S

Level: Intermediate

Format: In-person classroom or live online (always a live instructor)

Duration: 8 hours — 9:15 AM to 5:00 PM

Tuition: \$425 · includes all materials

Locations: Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver · Live Online

Credits: 8 CPE credits — accredited through the Texas State Board of Public Accountancy

Excel Pivot Tables

PROGRAM AGENDA — DETAILED COURSE OUTLINE

PROGRAM AGENDA

1. Introduction & Environment

- **Pivot Table workflow:** the end-to-end process from raw data to dashboard
- **Locating the tools:** the Pivot Table Tools ribbon and Quick Access Toolbar
- **Course exercise files:** exploring the datasets you will work with

2. Data Integrity & Preparation

- **Cleaning data:** eliminating blank rows, columns and duplicates
- **Fixing data types:** resolving text-vs-number inconsistencies
- **Flat file structure:** shaping data so Pivot Tables work properly

3. The Power of Excel Tables

- **Converting ranges to Tables:** Ctrl + T and why it matters
- **Dynamic ranges:** Pivot Tables that auto-expand with new data
- **Structured references:** the [@Column] syntax in your formulas

4. Foundational Pivot Skills

- **Source data:** choosing the right range or Table
- **Field List pane:** navigating it like a pro
- **The four quadrants:** Filters, Columns, Rows and Values explained

5. Value Field Settings

- **Summary types:** Count, Average, Max, Min beyond SUM
- **Differences from previous periods:** period-over-period comparisons
- **Percent of grand total:** showing values as % of the total
- **Running totals:** tracking growth over time

6. Sorting, Filtering & Sifting

- **Manual & automatic sorting:** sorting by label or value
- **Label and value filters:** narrowing your Pivot Table
- **Top 10 filtering:** showing only the highest performers
- **Clear filters:** one-click reset

7. Slicers

- **Inserting & formatting:** adding visual filter buttons
- **Connecting to multiple Pivots:** one slicer, many reports
- **Styling slicers:** columns, colors and custom styles

8. Timelines

- **Inserting Timelines:** interactive date-range filters
- **Filtering by years, quarters, months, days:** drilling into any time period
- **Synchronizing across reports:** one Timeline, many Pivots

9. Grouping & Segmentation

- **Grouping dates:** rolling daily data into weeks, months, quarters
- **Numeric brackets:** age groups, price ranges, performance tiers
- **Manual grouping:** custom buckets your business defines

10. Calculated Fields & Items

- **Formulas inside Pivots:** custom calculations without touching source data
- **Fields vs. Items:** understanding the difference
- **Managing calculations:** editing, removing and auditing with List Formulas

11. Pivot Chart Visualizations

- **Picking the right chart:** matching chart type to the question
- **Linking to Slicers & Timelines:** charts that filter live
- **Field buttons:** showing or hiding the Pivot controls
- **Dynamic titles & legends:** labels that update automatically

12. Professional Dashboard Design

- **Multi-chart layout:** laying out reports for clarity
- **Aligning Slicers & Timelines:** a clean, consistent UI
- **The pro look:** hiding gridlines and headings
- **Navigation-style dashboards:** menu-driven report design

13. Advanced Reporting (GETPIVOTDATA)

- **GETPIVOTDATA function:** linking standard cells to Pivot values
- **Custom static reports:** static layouts driven by Pivot data
- **Error handling:** managing missing values gracefully



A L T E R N A T I V E T O Y O U R M A N A G E R

Use this template to request approval. Customize the bracketed parts and send.

Dear [Manager's Name],

I would like to request approval to attend the Excel Pivot Tables class offered by Excel Experts. It is a one-day, hands-on class that will turn raw data into the kind of interactive reports leadership actually uses — exactly what I need on [team / project / report name].

What I'll bring back to the team

- **Pivot Tables on demand** — summarizing any dataset in seconds without manual formulas.
- **Interactive dashboards** — Slicers, Timelines and Pivot Charts that filter together live.
- **Better data preparation** — clean datasets that Pivot Tables can actually work with.
- **Custom calculations** — Calculated Fields for any business metric we need.
- **A reusable dashboard pattern** — I can teach the rest of the team.

Why this class specifically

- **One full day** — no multi-week commitment; minimal disruption to my workload.
- **Taught by a working Excel professional** — not a recorded video or a generic presenter.
- **Small public classes (up to 6 students)** — or live online if travel is a concern; private team training is also available.
- **8 CPE credits included** — accredited through the Texas State Board of Public Accountancy.
- **Locally available** — Dallas-Fort Worth, Houston, Austin, Oklahoma City, Denver, or live online.

The investment

- **Tuition:** \$425
- **Time out of office:** 1 business day
- **Included materials:** printed class binder, Excel exercise files (1-year access), laminated shortcut guide, certificate of completion

I expect to recover the time investment within the first few weeks just by building reports and dashboards faster — and I will be able to share what I learn with the rest of the team.

Class details and online registration: dfwexcel.com/excel-pivot-tables-class/

Questions: 817-841-9560

Thank you for considering this. I would appreciate your approval to enroll.

Sincerely,

[Your Name]

REGISTRATION

Enroll Today!

Online: dfwexcel.com

Phone: 817-841-9560

Price: \$425

Format: In-person classroom or live online

Cities: Dallas-Fort Worth · Houston · Austin · Oklahoma City · Denver

TRAIN YOUR TEAM

Bring Excel Experts to your office:

- Private group training on your schedule
- Tailored to your team's industry and data
- On-site, at our classrooms, or virtual
- 1-on-1 coaching also available

dfwexcel.com/excel-experts-train-your-team/