

Reporting & Analysis with Pivot Table

1 Day

COURSE OVERVIEW

Pivot Tables in Microsoft Excel 2007 enables you to dynamically convert voluminous data into meaningful business reports for making better business decisions – all within split seconds. What's more, you can even effectively present your pivot business reports in an automated fashion to audiences who are unfamiliar with pivot tables.

With the same data source, you can duplicate pivot tables or manoeuvre one single pivot table to produce different reporting perspectives to meet your business needs. Plain vanilla data can be transformed into important intelligence for strategic decision making purposes – all with very minimal manual work and almost no application of formula. Additional categories and complex calculations may also be added within pivot tables to discover meaningful relationships without altering your source data. Pivot table reports may also be implemented as automated dashboards for senior management use by adding macros to these reports.

This final level of a two-day comprehensive workshop helps participants learn the different ways of calculating and summarizing data in pivot tables, interpret pivot charts, understand pivot chart limitations and applying alternative methods to overcome such limitations, as well as to program macros such that non-pivot savvy users can manoeuvre pivot table reports.

Your business reporting and analytical experience shall never be dull and ineffective once you apply the ropes learnt from this course.

LEVEL

Advanced

WHAT WILL I GET OUT OF IT?

This course is suitable for professionals who often need to work on the following:

- Perform calculations on pivot reports to analyze and transform data into useful management information
- Create charts in association with pivot tables
- Use pivot tables for management presentation and performance reviews

WHO'S IT FOR?

This course is suitable for CFOs, finance managers, cost accountants, management accountants, financial accountants, business & financial analysts, pricing & market analysts and any other business professionals who often need to:

- Perform calculations on pivot reports to analyze and transform data into useful management information
- Create charts in association with pivot tables
- Use pivot tables regularly for business discussions, management presentation and performance reviews

DELIVERY MODE

Lecture with computer hands-on practices by participants for individual topics covered, followed by a major, practical case study to assist participants in assimilating all topics.

PRE-REQUISITES

Participants should have attended the course "Data Management with Pivot Tables".

Alternatively, participants should be advanced pivot table users who already possess good technical understanding on how pivot tables work, and who are already skilled in applying features such as grouping, multiple consolidation and pivot table customization.

Participants who have been merely using the 'drag and drop' features of pivot tables are considered as basic pivot table users and hence they should first attend "Data Management with Pivot Tables" before signing up for this course.

COURSE CONTENT

- How do we apply the readily available calculation rules already available in pivot tables?
- How do we insert customized calculations specific to our reporting needs?
- What are the advantages and disadvantages of such customized calculations?
- How do we insert, customize and interpret Pivot Charts?
- What are the limitations of Pivot Charts and how do we go around them?
- What are macros and how can they be applied to pivot tables?
- How do we use macro to inject interactivity into pivot reports?
- How do we use macro to automate data views and analysis within pivot tables?
- How do we synchronize the view of multiple pivot tables with just a simple click?