PacificCPE

COURSE

60503A

# Advanced Excel - Visualizing Data with Charts and Dates

Numbers tell a story, but charts make it stick. This course shows you how to pair pivot tables with dynamic charts that update automatically as your data changes—perfect for client presentations or management reporting. You'll also learn to group and summarize data by date and time periods, a critical skill for accountants tracking monthly trends, quarterly performance, or year-over-year comparisons. Walk away with more compelling, visual reports that communicate insights at a glance.

CREDIT HOURS 2 | FIELD OF STUDY BUSINESS | EXAM QUESTIONS 10

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## LEARNING ASSIGNMENTS AND OBJECTIVES

## Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

## Course Objectives

- Recognize the types of charts that can be created from pivot tables.
- Identify the uses of various Excel date/time functions.

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# Chapter 1: MAKING THE PIVOT TABLE MORE VISUAL WITH CHARTS

*Chapter Objective*

**After completing this chapter, you should be able to:**

- Recognize the types of charts that can be created from pivot tables.

At the end of Chapter 2 of course 60502A, "Sorting and Filtering the Pivot Table," we added slicers and timelines to a pivot table to make it more visual and interactive. Another great way to help visualize the pivot table is by representing the pivot table with a chart. One of Excel's great features is the ability to create a chart from a range of data. A chart can also come from a pivot table.

There's the old saying, "A picture is worth a thousand words." In Excel, a chart can tell the story of the data much quicker than analyzing the data itself. In this chapter, you will learn how to create a chart from a pivot table, how to manage the chart, and how to make the chart look better. It will also cover other popular topics about charts. A chart that comes from a pivot table is also called a PivotChart, so the terms *chart* and *PivotChart* will be used interchangeably in this chapter.

When a chart comes from a pivot table, the pivot table is the data source for the chart. If the pivot table changes, the chart will change, and if the chart changes, the pivot table will change. They are linked to each other. A pivot table can have as many charts as you need. Even if you move a chart for a pivot table to a different sheet, the pivot table and the chart are still linked to each other; if one changes, the other also changes.

In this chapter, you will learn how to create a column chart, a pie chart, and a combo chart, all with a pivot table as the source. The other Excel chart types that are not specifically discussed in this chapter work in similar ways.

### CREATING A CHART FROM A PIVOT TABLE

Creating a chart from a pivot table is like creating a chart with a range of data, but there are some differences. For example, the following chart types are not available when you create the chart from a pivot table: X Y (Scatter), Map, Stock, Funnel, Treemap, Sunburst, Histogram, Box & Whisker, and Waterfall. Another difference is that once the chart is created from a pivot table, you will not be able to change the data source of the chart like you can with a chart that was created from data that is not within a pivot table. In this example, we will create a column chart.

*Note*

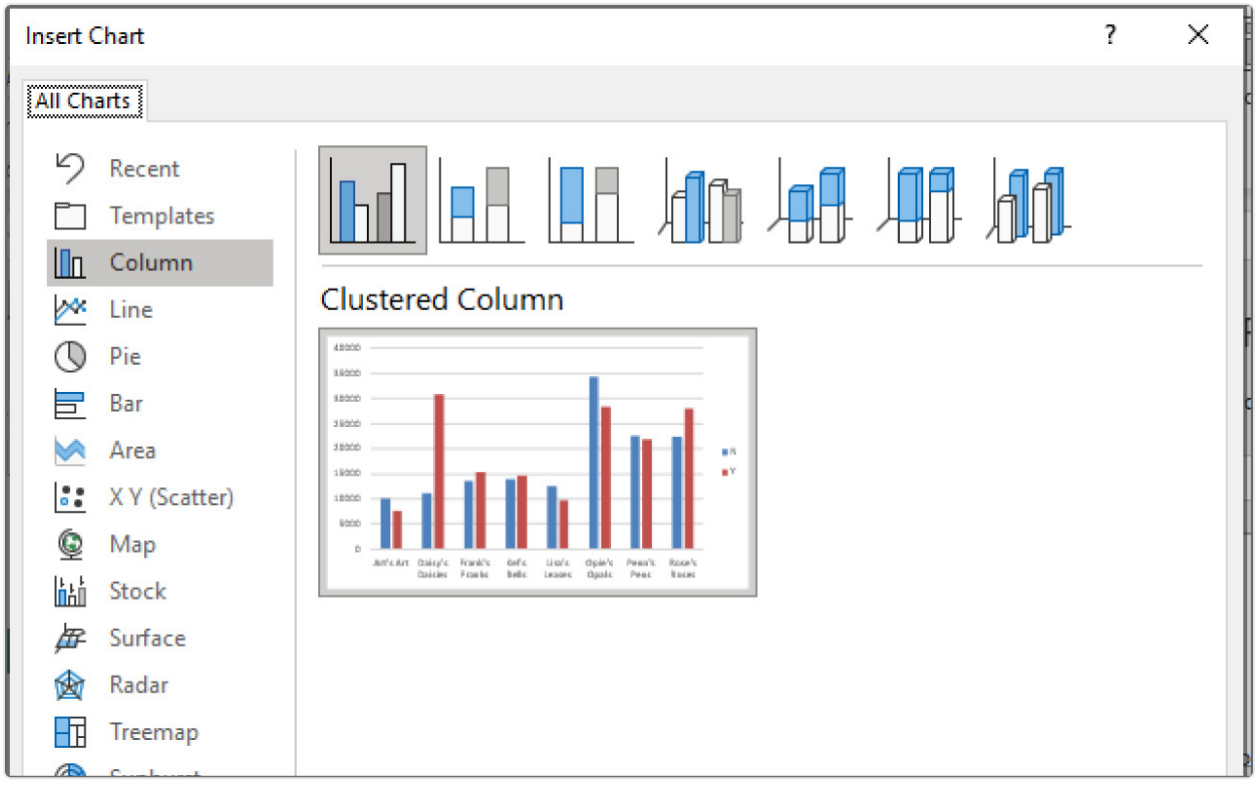
For the examples presented in this section of the chapter, you can use the sample file called *Charts.xlsx* that is included with this course. You can find the sample files at: **https://www.mypescpe. com/private/shared/CPE pdfs/8390. zip**

Most sections of this part of the chapter will use the Main Pivot Table sheet. If other sheets are needed, it will be noted in the steps for each section of the chapter.

To create a column chart from a pivot table, follow these steps:

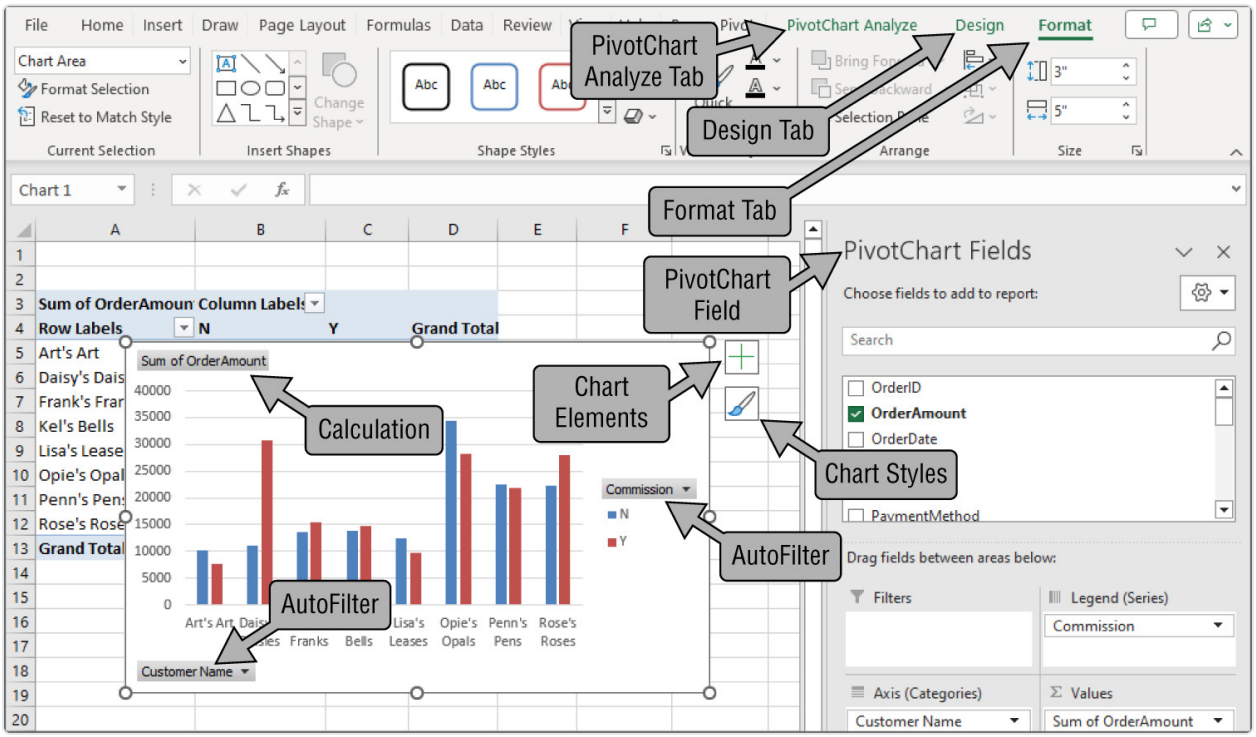
1. Click a pivot table. If you are using the sample data, click the pivot table on the Main Pivot Table sheet of the sample workbook.
2. Select the PivotTable Analyze tab.
3. Click the PivotChart icon on the right side of the ribbon. You will see the Insert Chart dialog box, as shown in Figure 5.1. When you choose a chart type on the left side of the dialog box, you will see different variations of that chart type at the top of the dialog box, if that chart type is available for charts that come from pivot tables.

**FIGURE 5.1: THE INSERT CHART DIALOG BOX**



4. Choose the chart type and the variation that you want, and click OK. For this example, choose the Column category on the left and the first variation at the top. You will now see the chart shown in Figure 5.2.

**FIGURE 5.2: A CHART THAT IS SELECTED**

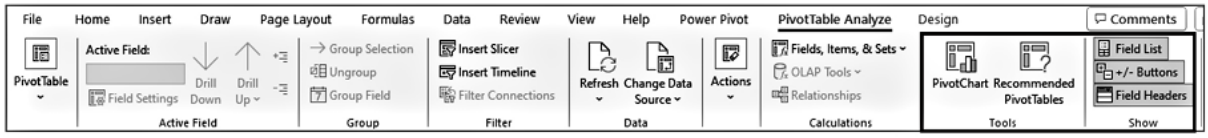



5. Move or resize the chart window as necessary.

As shown in Figure 5.2, when the chart is selected, you will see the Design tab and the Format tab on the right side of the ribbon. You will also see two icons, a plus sign and a paintbrush, on either the left or the right of the chart. The plus sign icon is called Chart Elements, and the paintbrush icon is called Chart Styles. Additionally, when the chart is selected, the tab that is usually named PivotTable Analyze will now be named PivotChart Analyze, and the window on the right that is usually called PivotTable Fields will now be called PivotChart Fields. The names of these two objects will change when you select the pivot table and when you select the chart. Both objects will disappear if you select a cell outside the pivot table or the chart.

Most of the icons on the PivotTable Analyze tab will be identical to the icons on the PivotChart Analyze tab. The PivotChart Analyze tab does include the Move Chart icon and the Field Buttons icon. Figure 5.3 shows the PivotTable Analyze tab, and Figure 5.4 shows the PivotChart Analyze tab. The differences are highlighted.

## FIGURE 5.3: THE PIVOTTABLE ANALYZE TAB

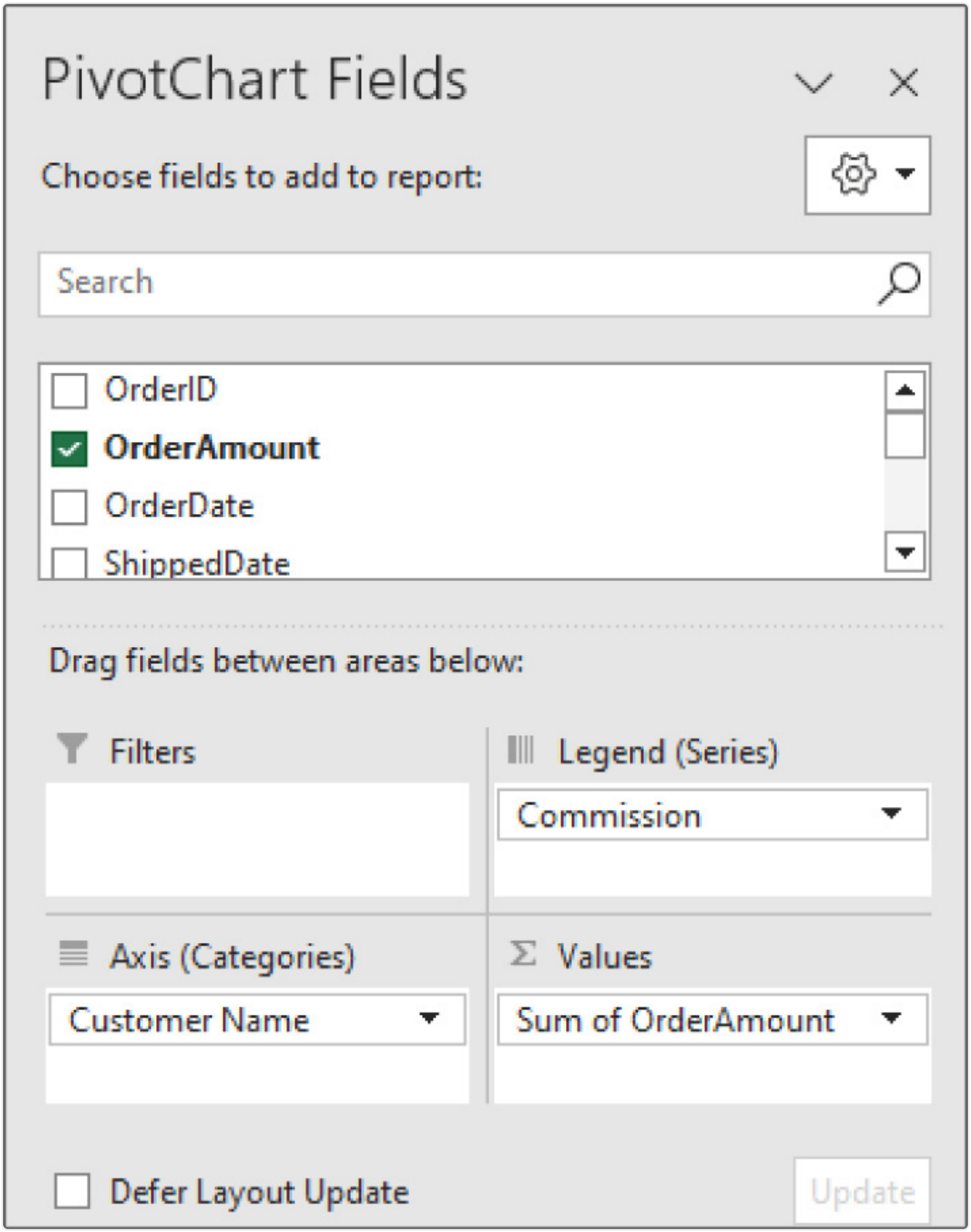



## FIGURE 5.4: THE PIVOTCHART ANALYZE TAB




The PivotChart Fields window will operate the same as the PivotTable Fields window, except that the section that is called “Rows” on the PivotTable Fields window is called “Axis (Categories)” on the PivotChart Fields window, and the section that is called “Columns” on the PivotTable Fields window is called “Legend (Series)” on the PivotChart Fields window. Figure 5.5 shows the PivotChart Fields window.

FIGURE 5.5: THE PIVOTCHART FIELDS WINDOW

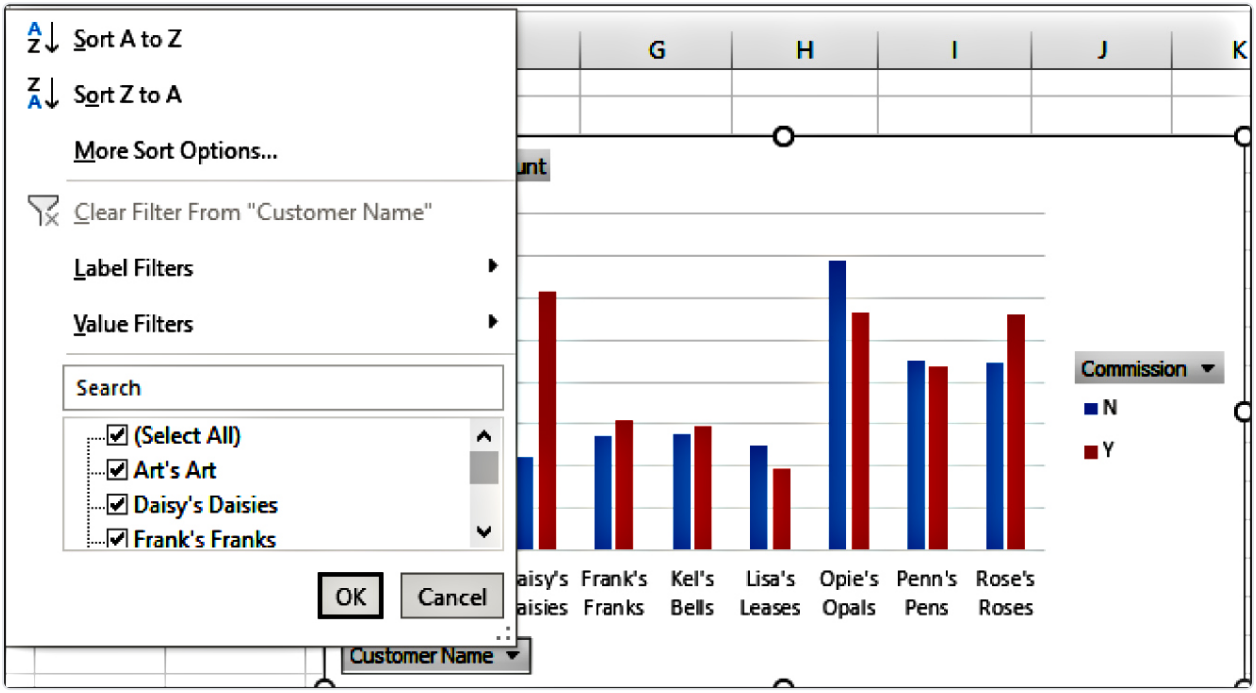


### PivotChart Features

Notice the calculation used in the chart is shown in the upper-left corner of the chart. You can right-click this calculation and then click Value Field Settings to change it. The Value Field Settings are discussed in Chapter 1 of course 60502A, "Using Calculations in Pivot Tables."

You can sort and filter the chart by using the AutoFilter drop-down menus that appear on the chart. Figure 5.6 displays the menu for the Customer Name filter in the example.

FIGURE 5.6: USING AUTOFILTERS TO SORT AND FILTER THE CHART




If you sort or filter the chart, the pivot table will also be sorted and filtered, and if you sort or filter the pivot table, the chart will also be sorted and filtered. You can read more about sorts and filters in Chapter 2 of course 60502A, "Sorting and Filtering the Pivot Table." Slicers and timelines also work with a chart, and you will learn how to coordinate slicers, timelines, charts, and other objects in Chapter 3 of course 60504A, "Pulling It All Together - Creating a Dashboard from Your Pivot Tables."

One important icon that appears on the right side of the PivotChart Analyze tab is Field Buttons. This icon allows you to turn on or turn off the filters and the values on the chart. If you click the Field Buttons icon, it will toggle all of the filters either on or off. Figure 5.7 shows a chart with all filters on, and Figure 5.8 shows a chart with all filters off. You can also turn the filters on and off individually by clicking the drop-down menu on the Field Buttons icon of the PivotChart Analyze tab, as shown in Figure 5.9.

FIGURE 5.7: A CHART WITH AUTOFILTERS TURNED ON

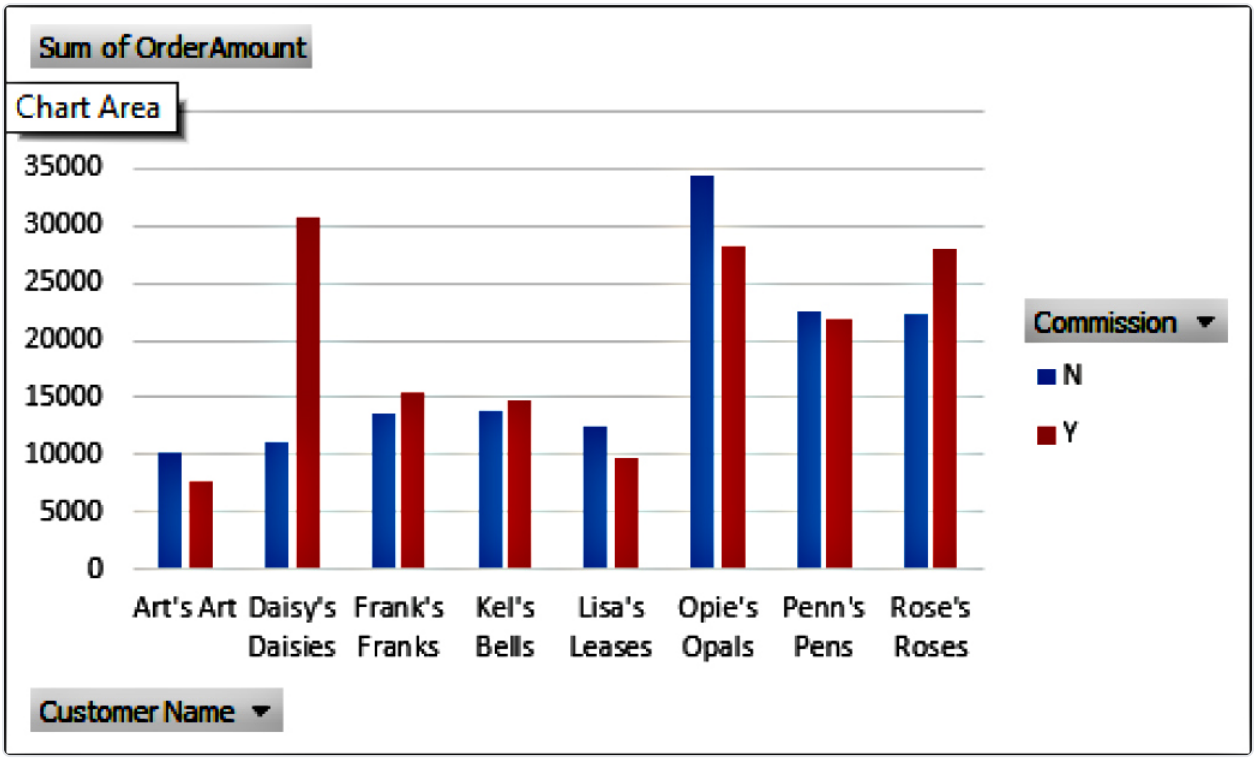



FIGURE 5.8: A CHART WITH AUTOFILTERS TURNED OFF

