PacificCPE

COURSE

60504A

Advanced Excel - Power Pivot Tables and Dashboards

Take your pivot table skills to the next level. This course covers how to consolidate data from multiple spreadsheets into a single pivot table, then introduces Power Pivot for handling larger and more complex datasets with greater analytical flexibility. The course wraps up by pulling everything together into a professional Excel dashboard built entirely from pivot tables. Ideal for CPAs and financial professionals who want to deliver polished, data-driven reports without relying on outside tools or developers.

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

Start Course ↓

Final Exam Copy ↓

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

- Recall the most useful feature of the PivotTable Wizard.
- Identify the characteristics of Power Pivot.
- Identify the uses for various form controls.

Copyright Notice

© 2026 Pacific CPE, LP. All rights reserved.

The materials in this course — including the text, illustrations, exhibits, examples, exam questions, and review questions — are the copyrighted property of Pacific CPE, LP. No portion of this course may be reproduced, stored in a retrieval system, distributed, or transmitted in any form or by any means (electronic, mechanical, photocopying, recording, or otherwise) without the prior written permission of Pacific CPE, LP, except for the personal, non-commercial use of the registered learner.

Pacific CPE, LP grants the registered learner a single-seat, non-transferable license to access this course for the purpose of completing the associated continuing professional education credit. Account credentials may not be shared. Group access requires a separate enterprise license.

This course is provided "as is" for educational purposes. While Pacific CPE, LP makes a reasonable effort to ensure the content is current and accurate, the materials should not be relied upon as a substitute for professional advice. Pacific CPE, LP disclaims all liability for any error, omission, or loss arising from the use of, or reliance on, the course content.

Questions about reproduction, licensing, or use of these materials should be directed to support@pacificcpe.com.

Publication Date: July 2026

TABLE OF CONTENTS

CHAPTER 01

Creating A Pivot Table From Multiple Spreadsheets 5

1.01 Creating A Pivot Table From Multiple Ranges Using The Pivottable Wizard 5

1.02 Figure 7.4: The Pivottable And Pivotchart Wizard Dialog Box 8

1.03 Creating A Pivot Table Using The Data Model 12

1.04 Figure 7.12: The Create Relationship Dialog Box..... 17

1.05 Figure 7.16: A Pivot Table With Fields From Three Tables With Relationships 21

1.06 Figure 7.20: The Set Manager Dialog Box 26

Test Your Knowledge..... 27

CHAPTER 02

Improving A Pivot Table With Power Pivot 30

2.01 Activating The Power Pivot Add-In 30

2.02 Figure 8.4: The Power Pivot For Excel Window..... 33

2.03 Figure 8.8: The Diagram View, After Tables Are Linked 40

2.04 Figure 8.12: A Table With A Calculated Column In The Power Pivot For Excel Window 45

2.05 Figure 8.17: The Key Performance Indicator (Kpi) Dialog Box..... 51

2.06 Summary 56

Test Your Knowledge..... 57

CHAPTER

03 **Pulling It All Together: Creating A Dashboard From Pivot Tables** 59

3.01 Figure 9.1: A Sample Dashboard 60

3.02 Working With Form Controls, Macros, And Vba Code 65

3.03 Figure 9.8: The Assign Macro Dialog Box 70

3.04 Figure 9.13: The Format Object Dialog Box 76

3.05 Figure 9.16: The Microsoft Visual Basic For Applications Window With The Vba Code For The Second Combo Box 81

3.06 Figure 9.20: The Protect Sheet Dialog Box 86

Test Your Knowledge 89

Final Exam Copy 94

Glossary 92

Index .....

Chapter 1: CREATING A PIVOT TABLE FROM MULTIPLE SPREADSHEETS

Chapter Objective

After completing this chapter, you should be able to:

- Recall the most useful feature of the PivotTable Wizard.

So far, all the pivot tables used in this course have come from one list of data, and in many cases, that is typical. But there will be times when different sheets have similar data or related data, so you will want to create the pivot table from multiple sheets or from multiple ranges within the same sheet. In this chapter, you will explore two different ways to generate a pivot table from more than one list of data. First, you will learn how to make a pivot table from lists that are similar to each other. Then, you will learn how to make a pivot table from lists that have different types of data but share a common field.

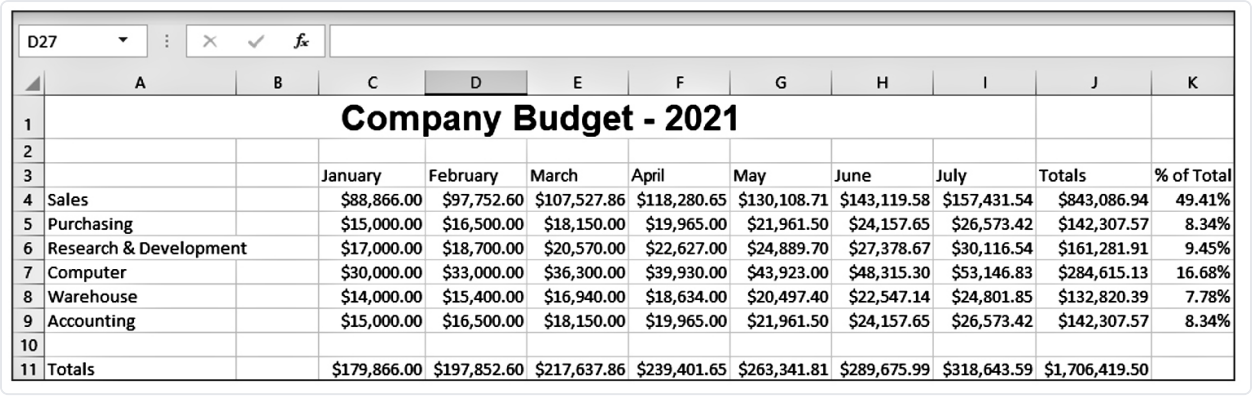
CREATING A PIVOT TABLE FROM MULTIPLE RANGES USING THE PIVOTTABLE WIZARD

Let's say you have multiple sheets or multiple ranges on the same sheet that are structured in a similar way. Maybe the data on each sheet is a budget for each month, or for each district, for example. You may want to add these sheets together to get totals for a certain time period, for a region, or for something similar. The sheets could have some rows and columns in common, but they do not have to be structured the same way. They should, however, be somewhat similar.

The pivot table used in this example can use data that has column headers and row headers, unlike the other pivot tables used in this course, where only the columns headers were used. You want the pivot table to add the rows and columns from the different sheets together if they have the same name, but still account for the rows and columns that are in one sheet but not in others.

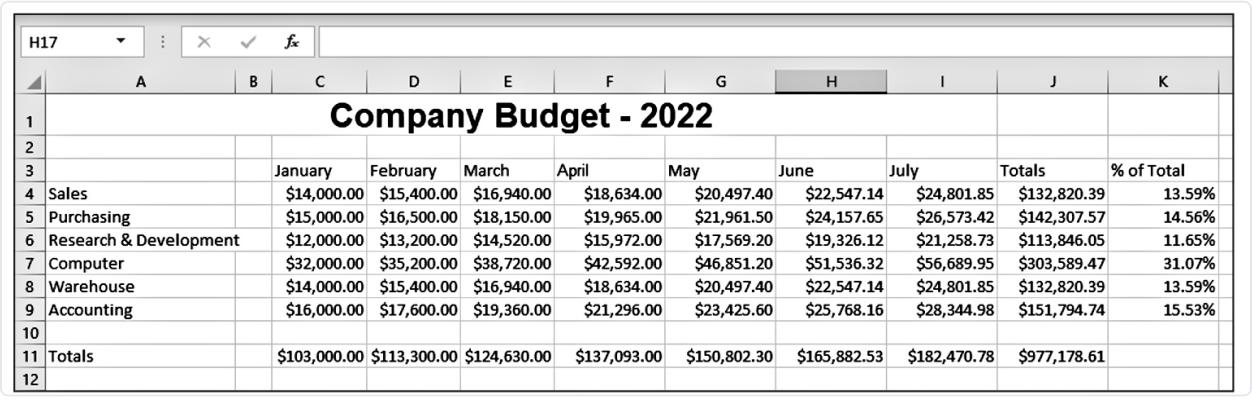
As an example, look at Figure 7.1, which contains the 2021 sheet for a company budget, and Figure 7.2, which contains the 2022 budget data. You can find these sheets in the sample workbook from the downloadable files for this chapter. Sheet 2022 of the sample workbook has the same rows and columns as sheet 2021, but with different budget amounts.

FIGURE 7.1: THE 2021 COMPANY BUDGET DATA (SHEET 2021 FROM THE SAMPLE WORKBOOK)



	A	B	C	D	E	F	G	H	I	J	K
1	Company Budget - 2021										
2											
3			January	February	March	April	May	June	July	Totals	% of Total
4	Sales		$88,866.00	$97,752.60	$107,527.86	$118,280.65	$130,108.71	$143,119.58	$157,431.54	$843,086.94	49.41%
5	Purchasing		$15,000.00	$16,500.00	$18,150.00	$19,965.00	$21,961.50	$24,157.65	$26,573.42	$142,307.57	8.34%
6	Research & Development		$17,000.00	$18,700.00	$20,570.00	$22,627.00	$24,889.70	$27,378.67	$30,116.54	$161,281.91	9.45%
7	Computer		$30,000.00	$33,000.00	$36,300.00	$39,930.00	$43,923.00	$48,315.30	$53,146.83	$284,615.13	16.68%
8	Warehouse		$14,000.00	$15,400.00	$16,940.00	$18,634.00	$20,497.40	$22,547.14	$24,801.85	$132,820.39	7.78%
9	Accounting		$15,000.00	$16,500.00	$18,150.00	$19,965.00	$21,961.50	$24,157.65	$26,573.42	$142,307.57	8.34%
10											
11	Totals		$179,866.00	$197,852.60	$217,637.86	$239,401.65	$263,341.81	$289,675.99	$318,643.59	$1,706,419.50	

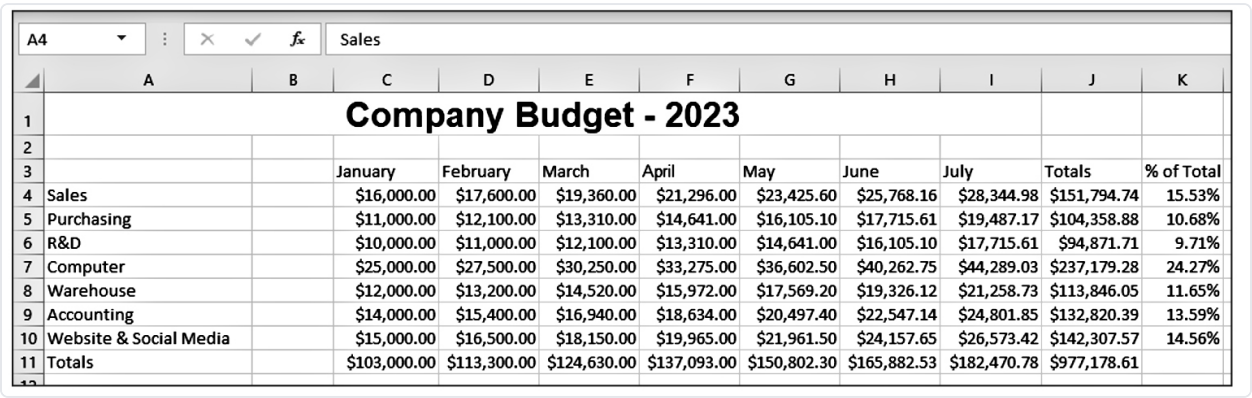
FIGURE 7.2: THE 2022 COMPANY BUDGET DATA (SHEET 2022 FROM THE SAMPLE WORKBOOK)



	A	B	C	D	E	F	G	H	I	J	K
1	Company Budget - 2022										
2											
3			January	February	March	April	May	June	July	Totals	% of Total
4	Sales		$14,000.00	$15,400.00	$16,940.00	$18,634.00	$20,497.40	$22,547.14	$24,801.85	$132,820.39	13.59%
5	Purchasing		$15,000.00	$16,500.00	$18,150.00	$19,965.00	$21,961.50	$24,157.65	$26,573.42	$142,307.57	14.56%
6	Research & Development		$12,000.00	$13,200.00	$14,520.00	$15,972.00	$17,569.20	$19,326.12	$21,258.73	$113,846.05	11.65%
7	Computer		$32,000.00	$35,200.00	$38,720.00	$42,592.00	$46,851.20	$51,536.32	$56,689.95	$303,589.47	31.07%
8	Warehouse		$14,000.00	$15,400.00	$16,940.00	$18,634.00	$20,497.40	$22,547.14	$24,801.85	$132,820.39	13.59%
9	Accounting		$16,000.00	$17,600.00	$19,360.00	$21,296.00	$23,425.60	$25,768.16	$28,344.98	$151,794.74	15.53%
10											
11	Totals		$103,000.00	$113,300.00	$124,630.00	$137,093.00	$150,802.30	$165,882.53	$182,470.78	$977,178.61	
12											

Now look at Figure 7.3, which contains company budget data for 2023, found in the 2023 sheet of the sample workbook. Notice that some of the row labels are different. The row that was called Research & Development in the 2021 and 2022 sheets is called R&D on the 2023 sheet. The 2023 sheet also has a new row called Website & Social Media. In real life, department names change over time, and new departments are created. The 2023 sheet reflects the updated department names.

FIGURE 7.3: THE 2023 COMPANY BUDGET DATA (SHEET 2023 FROM THE SAMPLE WORKBOOK)



A4 | Sales

	A	B	C	D	E	F	G	H	I	J	K
1	Company Budget - 2023										
2											
3			January	February	March	April	May	June	July	Totals	% of Total
4	Sales		$16,000.00	$17,600.00	$19,360.00	$21,296.00	$23,425.60	$25,768.16	$28,344.98	$151,794.74	15.53%
5	Purchasing		$11,000.00	$12,100.00	$13,310.00	$14,641.00	$16,105.10	$17,715.61	$19,487.17	$104,358.88	10.68%
6	R&D		$10,000.00	$11,000.00	$12,100.00	$13,310.00	$14,641.00	$16,105.10	$17,715.61	$94,871.71	9.71%
7	Computer		$25,000.00	$27,500.00	$30,250.00	$33,275.00	$36,602.50	$40,262.75	$44,289.03	$237,179.28	24.27%
8	Warehouse		$12,000.00	$13,200.00	$14,520.00	$15,972.00	$17,569.20	$19,326.12	$21,258.73	$113,846.05	11.65%
9	Accounting		$14,000.00	$15,400.00	$16,940.00	$18,634.00	$20,497.40	$22,547.14	$24,801.85	$132,820.39	13.59%
10	Website & Social Media		$15,000.00	$16,500.00	$18,150.00	$19,965.00	$21,961.50	$24,157.65	$26,573.42	$142,307.57	14.56%
11	Totals		$103,000.00	$113,300.00	$124,630.00	$137,093.00	$150,802.30	$165,882.53	$182,470.78	$977,178.61	

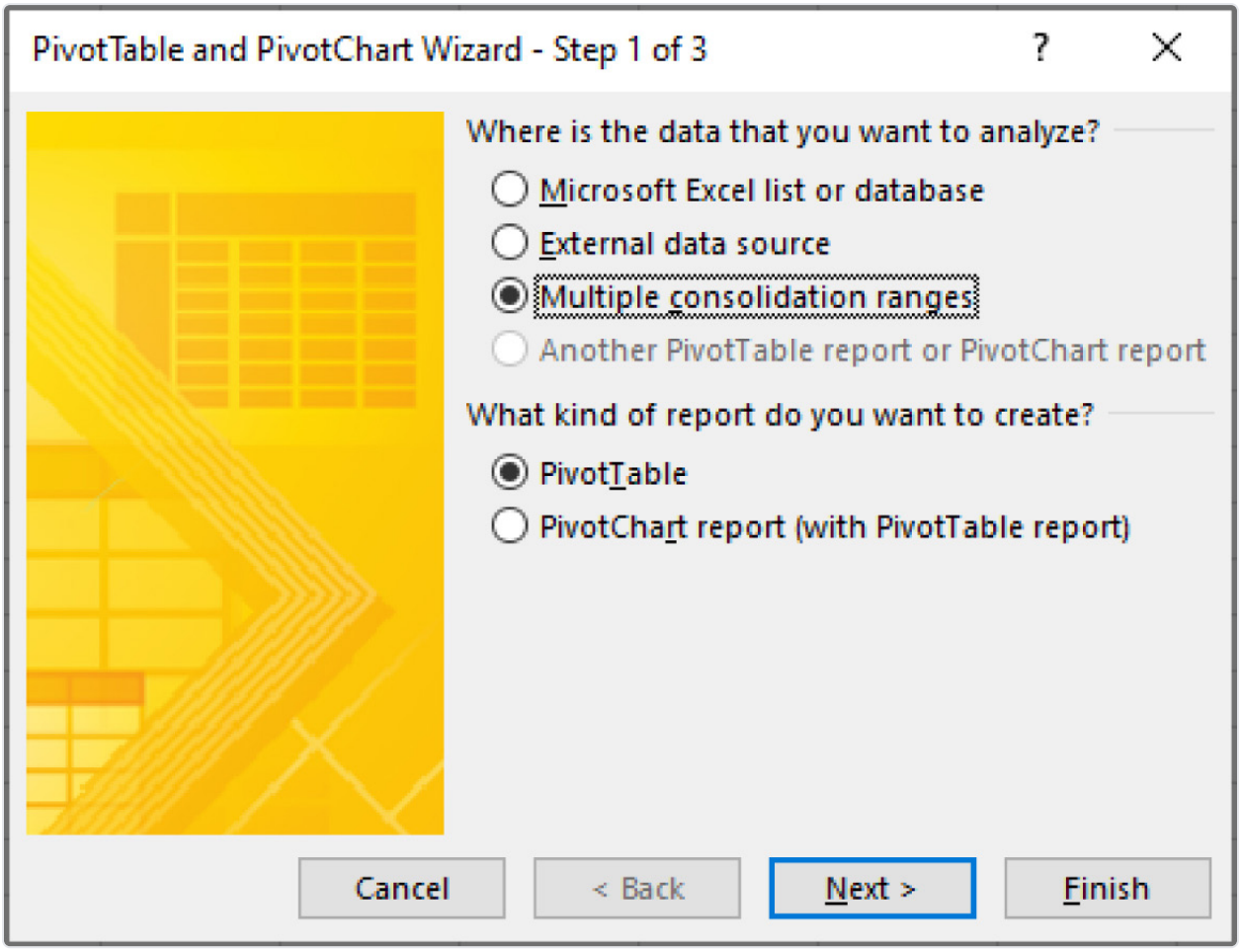
These different sheets or ranges can be summarized in a pivot table using the PivotTable Wizard. The PivotTable Wizard is a legacy tool in Excel that at one point was a popular way to create a pivot table, but now is mostly outdated. The PivotTable Wizard still has at least one useful feature, namely, the Multiple Consolidation Ranges feature, which allows you to make a pivot table from multiple sheets or ranges that are structured in a similar way.

The PivotTable Wizard can be activated in two different ways. You can use a keyboard shortcut, or if that doesn't work, you can add an icon to the QuickAccess Toolbar that will then open the PivotTable Wizard.

In this example, we want to include sheets 2021, 2022, and 2023 in a pivot table. The pivot table will go on a new, blank sheet.

To use a keyboard shortcut to display the PivotTable Wizard, click a blank sheet of a workbook. If you are using the sample data, click the Totals sheet of the sample workbook. One way to activate the PivotTable Wizard is with a keyboard shortcut. Just press these keys one after the other, without holding them down. If you have a PC, press the **Alt** key, then press the **D** key, and finally press the **P** key. This should open the PivotTable and PivotChart Wizard dialog box, as shown in Figure 7.4.

FIGURE 7.4: THE PIVOTTABLE AND PIVOTCHART WIZARD DIALOG BOX



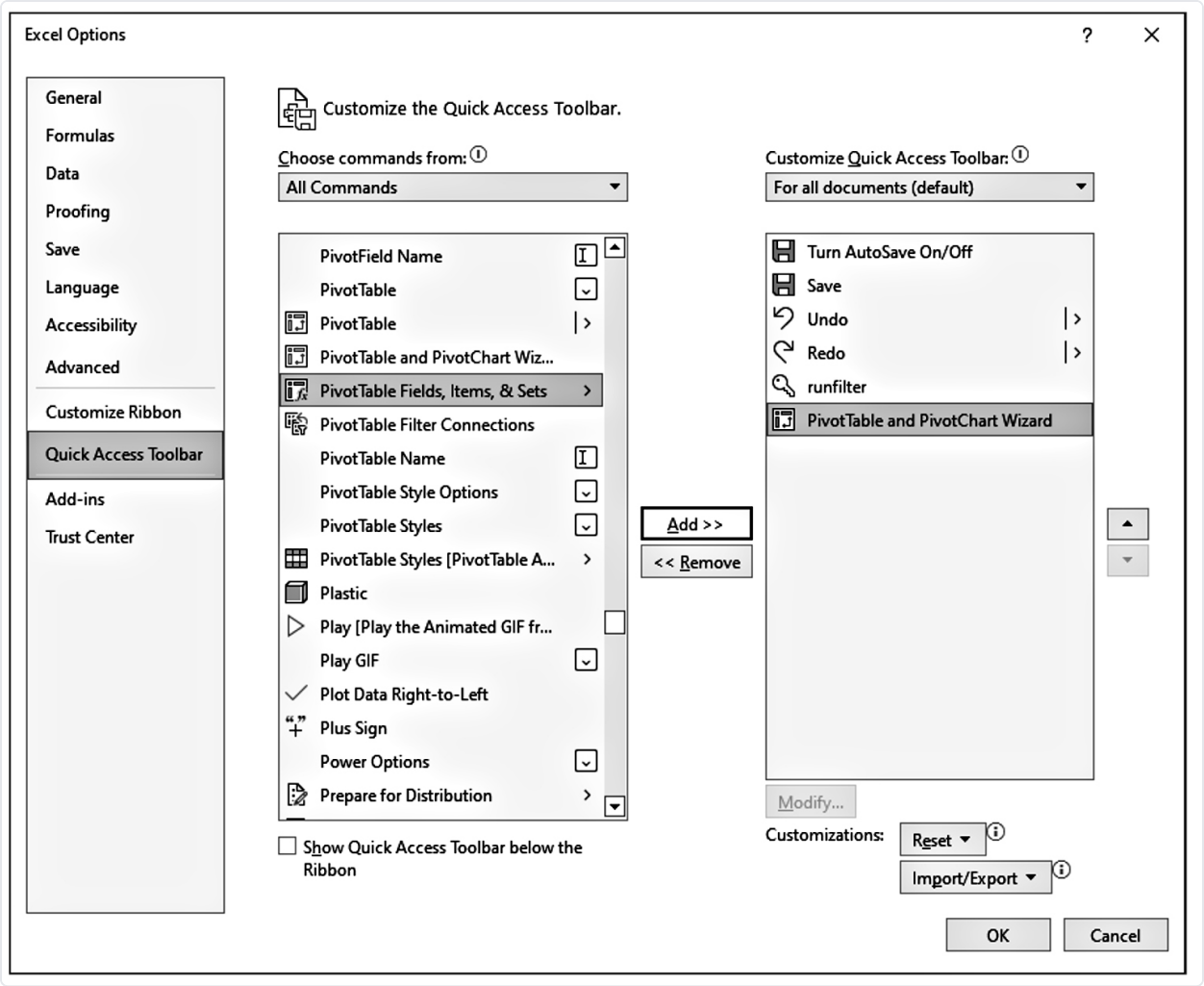
If the keyboard shortcut didn't work, then you will have to add an icon on the Quick Access Toolbar that will then open the PivotTable Wizard.

To add an icon on the Quick Access Toolbar to display the PivotTable Wizard, follow these steps:

1. Click the File tab.
2. At the bottom of the menu in the left pane, either click the word *Options* or click the word *More*, and then click Options. You will now see the Excel Options dialog box.
3. Select Quick Access Toolbar on the left.
4. Click the drop-down menu where it says *Popular Commands* and choose All Commands.
5. Scroll down on the long list below the words *All Commands* and find PivotTable and PivotChart Wizard.

6. Select PivotTable and PivotChart Wizard by clicking it, and then click Add >> in the middle of the dialog box. The choice called PivotTable and PivotChart Wizard will then appear in the right column, as shown in Figure 7.5. Click OK.

FIGURE 7.5: ADDING THE PIVOTTABLE AND PIVOTCHART WIZARD TO THE QUICK ACCESS TOOLBAR

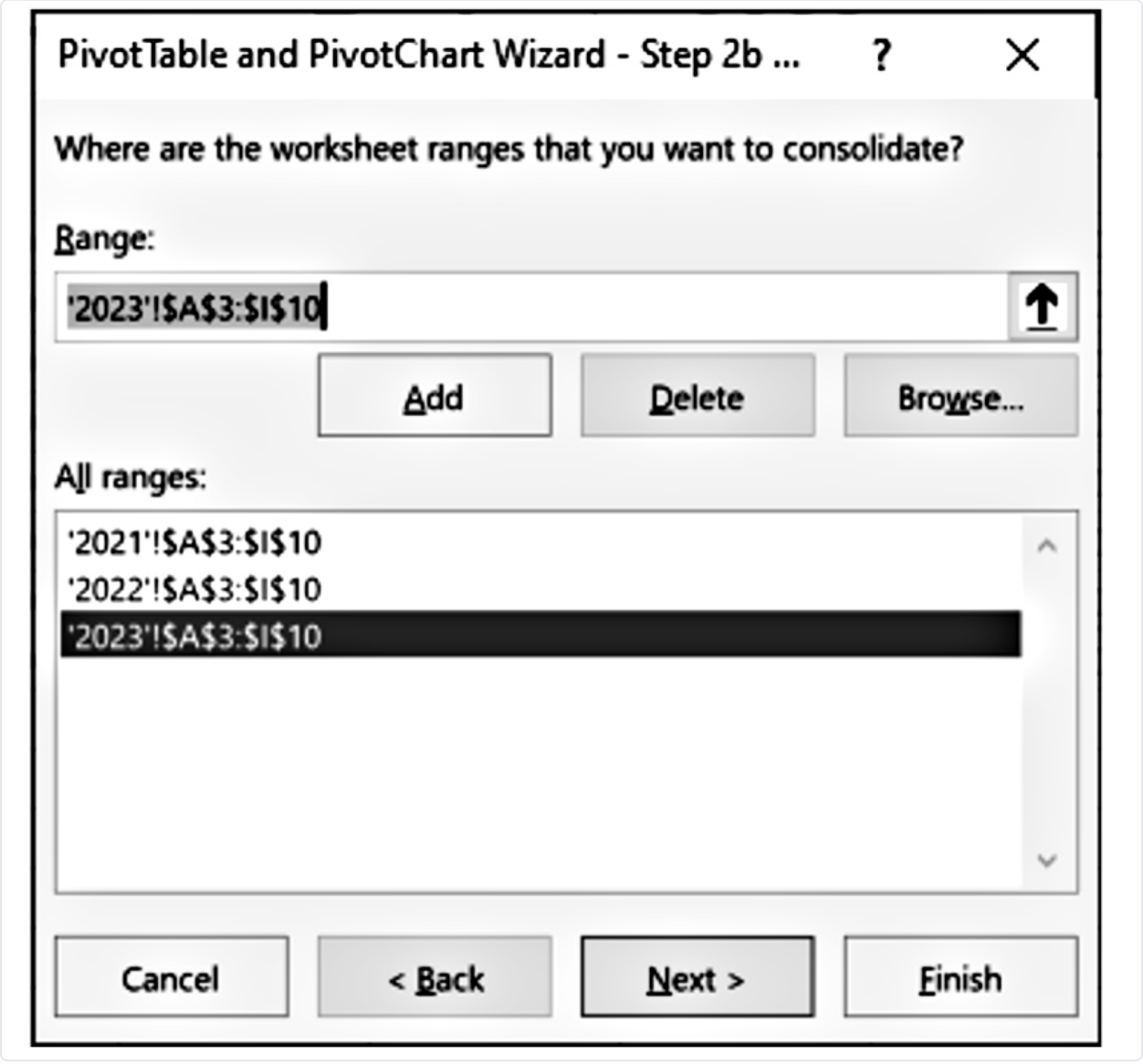


There will now be an icon for the PivotTable and PivotChart Wizard on the Quick Access Toolbar, which is the group of icons at the very top left of the Excel screen, above the tabs. Click that icon, and you will see the PivotTable and PivotChart Wizard dialog box, as shown in Figure 7.4.

Now that the PivotTable and PivotChart Wizard dialog box is open, you can summarize multiple sheets. In the following example, you are summarizing the company budgets for 2021, 2022, and 2023 shown earlier into a new pivot table.

1. Within the PivotTable and PivotChart Wizard dialog box, select Multiple Consolidation Ranges and click Next.
2. In the new dialog box, select Create A Single Page Field For Me, and click Next. You will see the dialog box called PivotTable and PivotChart Wizard – Step 2b of 3, as shown in Figure 7.6, but without the data added to the text boxes.

FIGURE 7.6: STEP 2B OF THE PIVOTTABLE AND PIVOTCHART WIZARD



3. Click the field below the word Range. This will select the text box so that you can set the range.
4. Click the first sheet that you want to use in the pivot table. If you are using the sample data, click the 2021 sheet.