Pivot tables in Google Sheets

The what, the how, and the why

Audience

Experienced Google Sheets users who are familiar with basic data entry and have some knowledge of formulas but are unfamiliar with reporting tools

Learning outcomes

After completing this course, the learner will be able to:

- Create a pivot table using Google Sheets to analyze data in multiple ways
- Summarize data in rows and columns to visualize the data and draw conclusions
- Filter data to include only the most relevant information in the report
- Design the most effective layout to present different types of information

Course outline

Section 1: Course introduction

Video (2 min.): What is a pivot table?
- Demonstrate turning a large dataset into a manageable table
- Preview rows, columns, values, filters
- Explain benefits and potential uses (make data tell a story)

Readings (1 min.): What you will learn in this course
- Learning objectives
- "What's in it for me?"

Section 2: Creating a pivot table

Video (2 min.): Set up a pivot table
- Select a dataset and create pivot table
- Add a value to row section
- Add value to column section
- Add value to values section

Readings (2 min.):
- Vocabulary: pivot table, rows, columns, values
- Job aid: Set up a pivot table, including screenshots

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Section 3: Using filters and sorting

Video (1 min.): Sort and filter to customize data
- Sort table ascending or descending in rows and column
- Add filter value to table and select specific values
- Filter table by condition and set up specific formula

Readings (1 min.):
- Vocabulary: filter, condition, formula, sort, ascending, descending

Section 4: Designing pivot tables

Video (2 min.): Further customize pivot table presentation
- Toggle grand total in rows and columns
- Add additional values to rows or columns
- Rearrange values from rows to columns
- Show values as percentages
- Use alternate summary formulas

Readings (1 min.):
- Vocabulary: Grand total
- Cheat sheet: Summarize formula definitions

Section 5: Conclusion

Knowledge check (2 min.)

Next steps and related courses (1 min.)

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