Class Outline-Pivot Tables for Appraisers

The goal of this class is to introduce the Microsoft Excel Pivot Table tool for use by residential appraisers. Attendees will be required to have a PC with Excel 2007 or later installed. We will switch between a presentation and hands on Excel exercises.

Course Outline

1. Introduction-10 Minutes
   a. Class Assumptions
   b. Class Goals
   c. How I’m Teaching This

2. Data requirements-10 Minutes

3. Excel Skills used in this class-10 Minutes
   a. Navigation
   b. Editing

4. What is a Pivot Table?-20 Minutes
   a. Structure
      i. Row, column, value
   b. Summary Functions-Value Field Settings
      i. Mean vs. Median
      ii. High Value
      iii. Low Value
   c. Filters
   d. Slicers
   e. Drill down for data
   f. Grouping by Row Label
   g. Show Values As
   h. Calculated Fields
      i. Pivot Table and other Excel resources

5. Formatting Pivot Tables-10 Minutes
   a. Value Field Settings
   b. Table formatting
   c. Rename Labels
   d. Remove Grand Totals

6. Uses-30 Minutes
   a. Contrasting/Grouped Pairs Analysis
   b. Summary Reporting/Neighborhood Market Analysis
   c. Graphs
   d. Change over time
   e. List Price/Sale Price Ratio
   f. Other Uses
      i. Distinct values in a field
      ii. Summary accounting

7. Examples-90 Minutes
   a. Contrasting
      i. Pools
      ii. 1 Story vs. 2 Story
b. Grouping
   i. Garage Count

c. Filtering
   i. Distressed Sales

d. Neighborhood Market Analysis

e. Neighborhood Graph

8. Reusable Workfile-30 Minutes