

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