Up until now, we've been creating pivot tables within the same workbooks as the data source. But what if you don't want to keep the PivotTable with the data source? What if different people need access to the data source than need to access the pivotable?

Connecting to an external data source can be done in a number of ways. I'll try to show you each and you can decide which way is best for you.

1. The first method we'll use when we've already created a pivot table and we want to change the source data to an external workbook that houses similar data in the same layout.

To start with we'll need to have open both workbooks. The workbook that has the pivotable and the workbook that has the new data source.

With your pivotable active, go to the Pivot Analyze tab of the ribbon and click Change Data Source. When the data source dialog box pops up, delete what's in the Table/Range input area and select the correct range. Switch to the workbook that has the new data source and select the whole table (A1:O94) and click OK. Switch back to your Pivot table and notice that the projects and incidents have updated with this new data. Your pivot table is in one workbook, summarising data stored in another workbook.

2. The next method is creating a pivot table from scratch, when the data is going to be saved separately from the analysis.

To start with we'll need to have open the external data source workbook and also a blank Excel workbook. With the blank workbook active, from the Insert tab of the ribbon, click PivotTable.

With the Table/Range box active, switch windows to the external data source and select all data (A1:O94). Click OK.

In our new Pivot Table we'd like to summarise the number of reports per project, per incident type.

- Drag the Report Number field into the values area, to count the items in this field
- Drag the Project into the Rows area
- Drag the Incident Type field into the column area

Your pivot table is in one workbook, summarising data stored in another workbook.

3. The last method is creating a pivot table from a dynamic range stored in another workbook. We might need to do this when creating pivotable reports from a working file (that's regularly updated) or if we're summarising multiple tables in a single report.

To start with we'll need to have open the external data source workbook and also a blank Excel workbook. Notice the name of the table in the Incident Register is tbl_Incidents (this is visible on the Table Design ribbon tab).

With the blank workbook active, from the Insert tab of the ribbon, click PivotTable.

Select the Use an external data source option button to enable the 'Choose Connection' command button. Click the 'Choose Connection' command button.

The dialog box that appears has 2 tabs: Connections and Tables. The connections lists connections to external databases that may have already been created. We'll look at this later on. Select the Tables tab to choose an Excel table. The drop-down at the top of the box should have 'All Tables' showing and a list of all tables within all open workbooks will be displayed below.

Select 'tbl_Incidents' (the table from our Incident Register) and click Open.

In the 'Create Pivot Table' dialog box, Click OK.

In our new Pivot Table we'd like to summarise the number of reports per project, per month.

- Drag the Report Number field into the values area, to count the items in this field
- Drag the Project into the Rows area
- Drag the Incident Type field into the column area

Your pivot table is in one workbook, summarising a dynamic data range stored in another workbook.