By now we should all know how to summarise a static data set with a pivot table.

If all you want to do is analyse a single source of data (once) from an Excel spreadsheet – you're all set. However, most of the time our analysis is recurring - for example, maybe you need to produce a monthly report or a weekly update, or daily tracking of KPIs.

Whatever your purpose is, your pivot table will generally require access to the most recent information available.

This week we'll learn how to update the data cache, by:

- Adding new records to the existing pivot table data source
- Changing the source to a different Excel file
- Connecting our Pivot table to an external database, and
- Refreshing the Pivot table.

Once we're comfortable with updating the pivot cache, we're going to explore the different methods to filter the summarised data: We'll learn how to:

- filter the row and column fields,
- apply and use slicers to facilitate user friendly selection of categories and
- apply and use timelines for user friendly selection of a date range.

All this so we can present the most up to date results for just the categories we're interested in.