Excel Campus

Excel PivotTable Auto Refresh

The Ultimate Cheat Sheet

This guide covers everything you need to know about Excel's "Auto Refresh" feature for PivotTables. Use it to ensure your reports are always up-to-date automatically!

> 💡 **The Core Concept**
>
> The **Auto Refresh** feature automatically updates your PivotTables and connected Pivot Charts the instant you make a change to the source data. This eliminates the need to manually click the **Refresh** button.
>
> **Location:** `PivotTable Analyze` Tab > `Refresh` Dropdown > `Auto Refresh`

Key Rules & Behaviors

✔️ **How It Works (The Basics)**

- **When ON:** Any change made to the source data will instantly update all connected PivotTables and Pivot Charts.
- **When OFF:** The PivotTable will NOT update automatically. You must use the manual **Refresh** button.

⚠️ Important Quirks & Gotchas

- **Activation Doesn't Trigger a Refresh:** Simply turning **Auto Refresh** ON will **not** refresh the PivotTable to capture pre-existing changes. You must make a NEW change or manually click **Refresh** once.

- **It's All About the Pivot Cache:** The `Auto Refresh` setting is tied to the hidden **Pivot Cache**, not the individual PivotTable. Turning it on/off for one PivotTable affects **all other PivotTables sharing that cache**.

- **Limitation: Does NOT Work with Power Pivot / Data Model:** This feature is **only for regular PivotTables**. It does not work for PivotTables created from the **Data Model** (Power Pivot/OLAP).

The #1 Best Practice: Use Excel Tables!

Why It's Essential

When you add new rows of data to an Excel Table (`Ctrl+T`), the table range automatically expands. With `Auto Refresh` on, this new data is instantly included in your report.

The Risk of Using a Range

If you use a standard cell range, you must manually change the data source every time you add new data, which is inefficient and can lead to errors.

✨ Excel Table (as source) + Auto Refresh (ON) = Fully Dynamic Reports ✨

Other Ways to Access the Setting

1. PivotTable Options

1. Right-click the PivotTable > `PivotTable Options...`

2. Go to the `Data` tab.

3. Check/uncheck **"Refresh data when..."**

2. Workbook Default Settings

1. Go to `File` > `Options` > `Data`.

2. Click `Edit Default Layout...` button.

3. Set the default under the `Data` tab.

Download at: https://www.excelcampus.com/lm-pivot-table-auto-refresh-guide/