

Microsoft Excel PivotTables and Power Query – Course Outline

Course Information

This course offers gives an in-depth view of Pivot Tables and how to use all its features. Delegates will then work with Power Query, where you can quickly reorganise, merge or manipulate data use with a PivotTable. Power Query remembers this process, so when additional files are added, the new data is available to use, thus saving time and resources.

Pre-requisites

Good knowledge of Excel is required, gained either by previous experience or by attendance on a Microsoft Excel Level 2 or 3 course.

What you will learn

- ✓ Do more with their data and want to realise the full potential of Pivot Tables and save time getting data in a layout suitable for Pivoting.

Course Content

PivotTables Essentials

- Layout and limitations
- Data preparation
- Slicers and timelines
- Refreshing data
- PivotTable cache

Calculated Fields and Items

- Calculated fields and items
- Modifying calculated fields and items
- Deleting calculated fields and items
- Changing the order of calculation

Customising PivotTables

- Formatting fixes
- Changing report layouts
- Working with sub totals
- Converting a pivot table to values
- Changing function type
- Changing the calculation type

PivotCharts and Conditional Formatting

- Creating PivotCharts
- Formatting PivotCharts
- Adding Slicers and Timelines
- Creating a dashboard
- Using conditional formatting

Grouping, Sorting and Filtering

- Grouping dates and numeric data
- Creating bespoke groups
- Sorting and filtering
- Sorting with a custom group
- Amending filters
- Different reports for different sort items

Analysing Multiple Data Sources

- Using multiple consolidation ranges
- Using the internal data model
- Creating a relationship
- Managing relationships

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- Adding/removing tables from the data model
- Creating PivotTables from an existing data model

Power Query

- What is Power Query

- Advantages of Power Query
- Linking to a database
- Linking tables
- Filtering data
- Unpivot data for better analysis
- Creating custom formulas
- Combining multiple files

Course duration: one day

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