

Grapevine Computing

Excel – Pivot Tables and PowerQuery

Duration: One day

Overview- This course gives an in-depth view of Pivot Tables fully explaining how to use all the aspects of the powerful tool. Delegates are then introduced to PowerQuery which is a feature that can very quickly reorganise, merge or manipulate data to get in a format for using a Pivot Table or just further work. PowerQuery can remember the process so when additional files are added, the new data is available to use saving considerable time and resources.

Who Should Attend – Users should have a good understanding of Excel and be in a position where they need to 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.

Content

Pivot Table Essentials

- Layout and Limitations
- Data preparation
- Slicers and Timelines
- Refreshing Data
- Pivot Table Cache

Customising Pivot Tables

- Formatting Fixes
- Changing Report Layouts
- Working with Sub Totals
- Converting a Pivot Table to Values
- Changing Function Type
- Changing the Calculation Type

Grouping Sorting and Filtering

- Grouping Dates and Numeric Data
- Creating Bespoke Groups
- Sorting and Filtering
- Sorting with a Custom Group
- Special Filters such as Top Five
- Different Reports for different sort items

Calculated Fields and Items

- Calculated Fields and Items
- Modifying Calculated Fields or Items
- Deleting Calculated Fields or Items
- Changing the Order of Calculation

Pivot Charts and Conditional Formatting

- Creating Pivot Charts
- Formatting Pivot Charts
- Adding Slicers and Timelines
- Creating a Dashboard
- Using Conditional Formatting

Analysing Multiple Data Sources

- Using Multiple Consolidation Ranges
- Using the Internal Data Model
- Creating a Relationship
- Managing Relationships
- Adding/Removing Tables from the Data Model
- Creating Pivot Tables from an Existing Data Model

PowerQuery

- What is PowerQuery
- Advantages of PowerQuery
- Linking to a Database
- Linking Tables
- Filtering Data
- UnPivot data for better analysis
- Creating custom formulas
- Combining multiple files
- Creating a lookup file

