Advanced Excel with Pivot Tables and Macros

Course Duration: 8 Hours (1 Day)

Overview

The "Advanced Excel with Pivot Tables and Macros" course is designed to enhance the analytical capabilities of learners by teaching them to efficiently manage, analyze, and visualize data using advanced Excel features. Learners will discover how to create and manipulate PivotTables starting from basic creation to sophisticated data exploration techniques. They will delve into the intricacies of PivotTable fields, layout, sorting, and filtering data to derive meaningful insights. The course also covers the dynamic use of tools like slicers and timelines to make reports interactive and engaging. In addition, the course provides a solid introduction to VBA Macros, enabling learners to automate repetitive tasks and customize Excel functionality to suit specific needs. They will learn about recording macros, understanding macro security, editing macros, and assigning macros to controls. This comprehensive training offers practical, hands-on experience that will empower users to leverage the full potential of Excel in their professional roles. PivotTables, data analysis, VBA Macros, and automation are at the heart of this course, providing learners with the skills necessary to become proficient and efficient in handling complex datasets and reporting tasks.

Audience Profile

Koenig Solutions' Advanced Excel with Pivot Tables and Macros course is designed for professionals looking to enhance their data analysis skills, including:

- Data Analysts
- Financial Analysts
- Business Intelligence Professionals
- Project Managers
- Administrative Assistants
- Marketing Analysts
- Sales Managers
- Human Resource Managers
- Accountants
- IT Professionals
- Research Analysts
- Educational Professionals
- Consultants
- Individuals preparing for roles that require advanced Excel skills

Course Syllabus

Module 1: PivotTables – Creation

- Creating a PivotTable from a Data Range
- Adding Fields to a PivotTable
- Creating a PivotTable from a Table
- Creating a PivotTable Using Recommended PivotTables

Module 2: PivotTables – Fields

- Using the PivotTable Fields Task Pane
- Moving the PivotTable Fields Task Pane
- Resizing the PivotTable Fields Task Pane
- Understanding PivotTable Fields

Module 3: PivotTable Layout – Fields and Areas

- Exploring Data with PivotTables
- Summarizing Values in a PivotTable
- Updating a PivotTable
- Creating PivotTable Reports

Module 4: PivotTables – Areas

- Understanding COLUMNS Area
- Understanding VALUES Area
- Understanding FILTERS Area

Module 5: PivotTables – Exploring Data

- Sorting and Filtering Data
- Nesting, Expanding, and Collapsing Fields
- Grouping and Ungrouping Field Values

Module 6: PivotTables – Sorting Data

- Sorting by Fields
- Sorting by Subtotals
- Using Additional Sort Options
- Manually Sorting Data
- Setting Sort Options
- Key Considerations When Sorting PivotTables

Module 7: PivotTables – Filtering Data

- Using Report Filters
- Applying Manual Filters
- Filtering by Text
- Filtering by Values
- Filtering by Dates
- Using the Top 10 Filter
- Using the Timeline Filter
- Clearing Filters
- Filtering Data with Slicers
- Inserting Slicers
- Filtering with Slicers
- Clearing Slicer Filters
- Removing Slicers
- Slicer Tools and Settings
- Configuring Slicer Captions
- Managing Report Connections
- Using the Selection Pane
- Understanding PivotTable Nesting
- Nesting Order of Fields
- Changing the Nesting Order

Module 8: PivotTables – Tools

- Using ANALYZE Commands
- Expanding and Collapsing Fields
- Grouping and Ungrouping Field Values
- Grouping by Date Fields
- Configuring Active Value Field Settings
- Adjusting PivotTable Options

Module 9: PivotTables – Summarizing Values

- Summing Values
- Configuring Value Field Settings
- Calculating % of Grand Total
- Calculating % of Column Total
- Calculating % of Row Total
- Counting Values
- Calculating Averages
- Finding Maximum and Minimum Values

Module 10: PivotTables – Updating Data

- Updating PivotTable Layouts
- Refreshing PivotTable Data
- Changing the Source Data for a PivotTable
- Switching to an External Data Source
- Deleting a PivotTable

Module 11: PivotTable – Reports

- Creating Hierarchies
- Using Report Filters
- Applying Slicers
- Using Timelines in PivotTables
- Utilizing DESIGN Commands
- Managing Grand Totals
- Customizing Report Layouts
- Adding Blank Rows
- Using PivotTable Style Options
- Applying PivotTable Styles
- Applying Conditional Formatting to PivotTables
- Creating Pivot Charts

Module 12: Introduction to VBA Macros

- Recording Macros
- Understanding Macro Security
- Editing Macros
- Assigning Macros to Different Controls