KOENIG
step forward

KOENIG SOLUTIONS · COURSE OUTLINE

Excel Pivot Tables: Advanced Techniques & Power Query

Learn to build, filter, format and consolidate PivotTables and PivotCharts, and import data with Power Query.

7
MODULES

79
TOPICS

COURSE OVERVIEW

This course covers creating, modifying and formatting PivotTables, including layout adjustments, value field settings and refreshing data. It then addresses filtering techniques such as label and value filters, report filters, slicers and conditional formatting, along with grouping data. Advanced PivotChart features are covered, including the PivotTable and PivotChart Wizard, consolidating multiple workbooks, and creating calculated fields and calculated items. The course concludes with creating and formatting PivotCharts and building PivotTables from external data using Power Query, including connecting to CSV files and editing queries.

WHO THIS COURSE IS FOR

- **Data Analysts**
- **Financial Analysts**
- **Business Analysts**
- **Excel Users**
- **Report Developers**

PREREQUISITES

Required Prerequisites

- Intermediate Excel skills.

LEARNING OBJECTIVES

- Create PivotTables using recommended options and the Quick Analysis tag
- Adjust PivotTable layouts and configure value field settings
- Apply sorting, filtering and conditional formatting to PivotTables
- Group data and use slicers to refine PivotTable views
- Consolidate multiple workbooks using the PivotTable and PivotChart Wizard
- Build calculated fields and calculated items in PivotTable reports
- Create and format PivotCharts from source data or existing PivotTables
- Import external data with Power Query and edit queries

COURSE SYLLABUS

7 Modules, 79 Topics

01

Creating and Modifying PivotTables

PIVOTTABLES

Guidelines for Data in a PivotTable

CREATING PIVOTTABLES

Creating a PivotTable · Using Recommended PivotTables · Using the Quick Analysis Tag

PIVOTTABLE ELEMENTS

Adding Fields · PivotTable Fields Pane · PivotTable Tools Tabs

ADJUSTING PIVOTTABLE LAYOUTS

Using the PivotTable Options Dialog · Using the Design Tab · Setting the Default Layout

FORMATTING PIVOTTABLES AND FIELDS

Using the Design Tab · General Formatting Options · Value Field Settings · Showing More Than One Value Calculation

Expanding & Collapsing Fields

REFRESHING PIVOTTABLES

Refreshing a PivotTable · Re-Defining the PivotTable Data Range

02

Filtering PivotTables

FILTERING DATA

Sorting a PivotTable · Basic Sorting · Basic PivotTable Filtering · Basic Filtering · Filtering a PivotTable · Filtering in the Report Filter

ADVANCED FILTERING

Label and Value Filters · Using the Top or Bottom 10

REPORT FILTERS

Using Multiple Report Filters · Using the Search Box to Apply a Filter · Using Wildcards

Filtering With Search Box

ADDING TO FILTERS

Adding Criteria to an Existing Filter

CONDITIONAL FORMATTING IN A PIVOTTABLE

Using Conditional Formatting · Clearing Conditional Formats

GROUPING DATA

Grouping Data in a PivotTable · Sorting by Fiscal Year

USING THE SLICER

Using Slicers · Closing or Deleting a Slicer · Formatting a Slicer · Using the Slicer Settings Dialog · Slicer Connections

03

Advanced Features of PivotCharts

PIVOTTABLE AND PIVOTCHART WIZARD

- Considerations for Setting Up Your Source Data
- Installing PivotTable and PivotChart Wizard

USING THE WIZARD

- **Step 1:** What Type of Consolidation do I want?
- **Step 2:** Choosing the Data Source
- Step 3 Where to add PivotTable or PivotChart

CONSOLIDATING MULTIPLE WORKBOOKS OR WORKSHEETS

- Consolidating Data From Multiple Excel Sources
- Using The Create A Single Page Field
- Creating Your Own Page Fields

EDITING A CONSOLIDATED PIVOTTABLE

- Modifying a Consolidated PivotTable
- Using Find&Replace to Rename Page Field Items

CALCULATED FIELDS AND CALCULATED ITEMS

- Creating a Formula in a PivotTable Report

ADDING A CALCULATED ITEM

- Adding a Calculated Item to a Field

ADDING A CALCULATED FIELD

- Adding a Calculated Field
- Editing Calculated Items Or Fields
- Editing Calculated Items
- Deleting Calculated Items
- Editing Calculated Fields
- Deleting Calculated Items

SOLVE ORDER AND DISPLAYING FORMULAS

- Changing the Order
- Displaying Formulas

04

Creating and Modifying PivotCharts

PIVOTCHARTS

- Inserting PivotCharts
- Creating a PivotChart from the Source data
- Creating a Chart Based on an Existing PivotTable

FILTERING PIVOTCHARTS

- Using Field Filter Drop-downs
- Adding Slicers and Timelines

FORMATTING PIVOTCHARTS

- Using the Format Shape Dialog Box

05

Creating PivotTables from External Data

GET DATA FROM A CSV FILE

Connecting to CSV files

POWER QUERY

Using Power Query · Managing Columns; Split a Column · Sorting & Filtering Data

EDITING A QUERY

Accessing the Queries

Appendix A

UNLOCKING A SLICER

Unlocking a Slicer in a Protected Worksheet

Custom Slicer Styles

CREATING CUSTOM PIVOTTABLE STYLES

Creating a Custom PivotTable Style · Applying a Custom PivotTable Style · Modifying a Custom PivotTable Style

USING CUSTOM PIVOTTABLE STYLES

Using a PivotTable Style in Another Workbook

Appendix B

TROUBLESHOOTING DATA

Leading and Trailing Spaces · The TRIM Function · Selecting Blank Rows/Columns for Elimination

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training | Live Online Classes (ILO) | Fly-Me-A-Trainer (FMAT) | Flexi (Self-Paced) | 1-on-1 Training

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Talk to a learning advisor about schedules, group training and customised delivery.

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