

KOENIG SOLUTIONS • COURSE OUTLINE

Excel Analytics with PivotTables and Macros

Learn to build, explore and present data with PivotTables, slicers and timelines, and automate tasks using VBA Macros.

1 Day

8 HOURS

12

MODULES

79

TOPICS

COURSE 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.

WHO THIS COURSE IS FOR

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

What You Will Learn

- Create PivotTables from data ranges, tables and recommendations
- Configure PivotTable fields across rows, columns, values and filters
- Sort and filter PivotTable data using fields and subtotals
- Apply slicers and timelines to filter and connect reports
- Summarise values using sums, averages, counts and percentages
- Update PivotTable layouts and refresh underlying source data
- Customise PivotTable reports with styles, layouts and pivot charts
- Record, edit and assign VBA Macros to automate tasks

COURSE SYLLABUS

12 Modules, 79 Topics

01

PivotTables - Creation

TOPICS

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

02

PivotTables - Fields

TOPICS

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

03

PivotTable Layout - Fields and Areas

TOPICS

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

04

PivotTables - Areas

TOPICS

Understanding COLUMNS Area · Understanding VALUES Area · Understanding FILTERS Area

05

PivotTables - Exploring Data

TOPICS

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

06

PivotTables - Sorting Data

TOPICS

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

07

PivotTables - Filtering Data

TOPICS

- 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

08

PivotTables - Tools

TOPICS

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

09

PivotTables - Summarizing Values

TOPICS

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

10

PivotTables - Updating Data

TOPICS

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

11

PivotTable - Reports

TOPICS

- 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

12

Introduction to VBA Macros

TOPICS

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

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

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

Ready to Get Started?

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

Visit koenig-solutions.com

✉ info@koenig-solutions.com