Excel Pivot Tables and Power Query

Training Methodology

This course adopts a practical approach to teaching participants how to use Pivot Tables and Power Query in Excel. The methodology includes:

- Instructor-led demonstrations: Live demonstrations of creating and managing Pivot Tables and using Power Query to import, clean, and transform data.

- Hands-on exercises: Participants will practice building Pivot Tables and using Power Query on real-world datasets.

- Collaborative learning: Group discussions and Q&A to address common data analysis challenges.

- Case studies: Application of learned skills to real-world business problems.

- Continuous feedback: Regular feedback on participant exercises to help refine their skills in data analysis.

Course Overview

The Excel Pivot Tables and Power Query course equips participants with the skills needed to handle large data sets efficiently and perform advanced data analysis. By the end of this course, participants will be able to create dynamic reports, summarize data, and automate data processing using Power Query. This course is designed to help professionals extract valuable insights from their data and improve decision-making processes.

What You Will Learn

- Pivot Table Creation: Learn how to create and customize Pivot Tables for summarizing and

analyzing data.

- Data Filtering and Slicing: Techniques for filtering data and using slicers to create interactive reports.

- Power Query Basics: Mastering Power Query to clean, transform, and load data from various sources.

- Data Transformation: Using Power Query to merge, append, and reshape data.

- Automating Data Processes: Building automated data workflows in Excel using Power Query.

Who Should Learn

- Data Analysts: Individuals responsible for analyzing and presenting business data.

- Business Professionals: Anyone needing to create reports, analyze trends, or summarize large datasets.

- Finance Professionals: Accountants and analysts who manage financial data and need to create custom reports.

- Students and Researchers: Those handling large datasets for academic or research projects.

- Small Business Owners: Entrepreneurs looking to manage and analyze their business data more efficiently.

5 Training Modules

Module 1: Introduction to Pivot Tables

- Setting up and creating a Pivot Table from raw data.

- Customizing Pivot Table fields, formatting, and layouts.

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- Grouping and sorting data in Pivot Tables.

Module 2: Advanced Pivot Table Techniques

- Using calculated fields and items to perform custom calculations.

- Applying filters, slicers, and timelines for dynamic reporting.

- Creating Pivot Charts to visualize Pivot Table data.

Module 3: Introduction to Power Query

- Importing data from various sources (Excel files, CSV, web).

- Cleaning and transforming data using Power Query tools.

- Understanding the Power Query Editor for data manipulation.

Module 4: Data Transformation with Power Query

- Combining data from multiple tables using merge and append queries.

- Using data transformation techniques (unpivot, pivot, grouping).

- Automating repetitive data-cleaning tasks with Power Query.

Module 5: Reporting and Automation

- Integrating Power Query with Pivot Tables for dynamic reporting.

- Automating data refreshes and report generation using Power Query.

- Creating dashboards with Pivot Tables, Pivot Charts, and Power Query for advanced reporting.

Conclusion

By the end of this course, participants will be able to use Pivot Tables and Power Query in Excel to

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manage large datasets, perform detailed data analysis, and automate data transformation processes. These skills are essential for anyone looking to improve their data management and reporting efficiency, making the course ideal for data analysts, business professionals, and financial experts.