Excel Data Wizard

Pivot Table Analysis & Reporting – 1 Day

Pre-requisites

To gain the most from this course you need to have successfully completed the Excel Essentials course and/or the Excel Intermediate Formulas and Functions course or have equivalent skills and knowledge. Understanding Named Ranges would be advantageous.

Description

Do you need to:

- Create and Modify a Pivot table
- Efficiently analyse large amounts of data
- Apply smart charting techniques
- Sort and Filter large amounts of data
- Summarise data using Excel Tables
- Consolidate data from multiple workbooks
- Hide or display data to show summary totals
- Control data entry using data validation

Aim

This course aims to provide you with the skills and knowledge necessary to use the majority of Excel's analysis tools for modelling and manipulating data.

Learning Outcomes

At the completion of this course you should have the skills and knowledge to:

- Create and filter PivotTable reports to analyse data
- Create and manipulate PivotTable charts to represent PivotTable data graphically
- Analyse data by using the sort and filter features
- Work with Excel tables
- Outline data to summarise information
- Consolidate data into Data Consolidation reports
- Use Data validation to control data input

Topics

Key topics covered in this course include:

Introduction to PivotTables

- Create and modify a PivotTable report
- Analyse data using PivotTables
- Group field items
- Build a PivotTable on a Table
- Display source data
- Filter and sort labels and data
- Filter with Slicers and a Timeline

Smart Charting techniques

- Create and modify a PivotChart
- Add a secondary axis and trendline

Outline Data

- Use the Outline feature to summarise large worksheets and display only totals

Sort and Filter Table Data

- Sort data using AutoFilter buttons or Sort dialog box
- Create and use Custom filters
- Subtotalling filtered lists

Work with Excel Tables

- Understand formatting with Excel tables
- Filter with Slicers
- Delete duplicates using Conditional formatting

Data Validation

- Control how data is entered into worksheets
- Set up various data validation settings
- Create an input and error message to inform users what information is required
- Circle/Clear invalid data in Excel
- Lock cells with data validation