



MICROSOFT EXCEL ADVANCED PIVOTTABLE AND PIVOTCHART

Course ID : MSE-L4



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Duration: 2 Days

(12 Hours) 09:00 AM – 04:00 PM



Price: 8,500 THB

* (excluding VAT 7%)

* Eligible for 200% tax deduction



Training Schedule

www.9experttraining.com

Category: Business, Data

This course focuses on professional data summarization and interactive dashboard reporting using PivotTable and PivotChart tools in Microsoft Excel. Participants will learn how to prepare and manage data efficiently with Power Query and how to create comprehensive, interactive dashboards to support business decision-making. The curriculum includes case studies such as consolidating data from multiple sources, building executive summaries, analyzing sales trends, and developing dynamic PivotTables and PivotCharts.

Objectives

1. Understand the capabilities and functions of PivotTable and PivotChart.
2. Use PivotTable for data visualization, analysis, and summarization.
3. Create dynamic PivotTables and PivotCharts.
4. Select appropriate chart types and design effective PivotCharts.

Target Audience

1. Individuals who want to use Power Query for data preparation before analysis.
2. Those who need to efficiently summarize large datasets.
3. Users seeking to develop dynamic and flexible PivotTables and PivotCharts.
4. Participants interested in advanced PivotTable calculations and in leveraging summarized data for deeper analysis.

Prerequisites

1. Prior experience with Microsoft Excel including the ability to manage, analyze, and visualize data.
2. Basic proficiency in using Excel formulas.

System Requirements

1. Windows 11 or Windows 10
2. Microsoft Access | Microsoft 365

TRAINING TOPICS



DAY 1 Morning Session

9:00 AM – 12:00 PM

1. Review of Microsoft Excel for Data Analytics

- Essential shortcut keys in Microsoft Excel
- Conditional formatting techniques

2. Data Sources for Business Intelligence

- Data modeling for business intelligence applications
- Working with tables

3. PivotTable for Data Analysis

- Definition and benefits of PivotTable
- Data summarization using PivotTable
- Components of a PivotTable
- Preparing data for analysis and summarization
- Importing data from multiple sources
- Creating and modifying PivotTables
- Reading and interpreting PivotTable results
- Filtering and grouping data
- Summarizing data by month, quarter, and year
- Multi-dimensional data analysis
- Calculation functions in PivotTables (SUM, AVERAGE, MAX, MIN, COUNT, etc.)
- Useful summarization techniques
- Displaying results as a percentage of the grand total
- Analyzing percentage change (e.g., year-over-year sales comparison)
- Performing change analysis (e.g., month-over-month sales differences)
- Ranking results (e.g., top-selling products)
- Calculating cumulative totals



DAY 1 Afternoon Session

1:00 PM – 4:00 PM

- Adding calculated fields
- Troubleshooting compatibility issues in older Excel versions
- Designing and customizing PivotTables

- Applying conditional formatting to PivotTables e.g., icon sets for top sales, color coding for declining sales)
- Report layout options: Compact, Outline, and Tabular
- Filtering data with Slicer and Timeline
- Configuring Slicer settings to control multiple PivotTables (Report Connection).
- **Case Studies:**
 - Summarizing three years of sales data by customer or product, and analyzing sales trends by salesperson
 - Calculating monthly sales differences and percentage change
 - Creating executive dashboards for both overall and segmented sales views

DAY 2 Morning Session

9:00 AM – 12:00 PM

4. Introduction to PivotChart and Visualization

- Definition and benefits of PivotChart
- Components of a PivotChart
- Creating different chart types and understanding their advantages
- Selecting appropriate charts for specific analytical tasks
- Common chart types: column, bar, pie, and line
- Applying data filters in charts (Top 10, date, number, and text filters)
- **Workshop:**
 - Building interactive dashboards to track sales performance
 - Creating dual-axis charts for monthly sales and order counts
 - Breaking down monthly sales by product group

DAY 2 Afternoon Session

1:00 PM – 4:00 PM

5. Data Preparation with Power Query

- Overview and benefits of Power Query
- Importing data from multiple sources
- Data transformation techniques
- Key Power Query commands:
 - Changing data type
 - Removing columns or rows
 - Removing blank rows
 - Using the first row as header
 - Adding custom columns
 - Merging queries

6. GetPivotData Function

- Extracting data from PivotTable for customized reporting
- Customizing reports using GetPivotData.
- **Case Study:**
 - Using PivotTables as data sources for conditional reporting.

7. Advanced Customization and Troubleshooting

- Resolving issues with unstructured or unprepared data
- Configuring automatic data updates



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