

## Course Aims & Objectives

PivotTables offer the user the ability to number-crunch large amounts of data in order to produce concise reports and charts which can be automatically updated at the touch of a button. Learn the basics of creating a robust database within Excel and how to interrogate the database data using PivotTables. Create basic Dashboards which feed from the database data and which update automatically as the data is refreshed.

## Who Should Attend?

This course is for anyone who needs to manipulate or interrogate large data sets. It does not focus on any formulas, so is not designed for someone who wants to use lots of formulas or functions. The course is aimed at those who need to create end-user systems which will be used by other people. It does not cover items such as Power Bi, Power Pivot or connections to other data sources. Learners should already have a good understanding of Excel basics and should be able to create basic spreadsheets, format cells and manipulate columns, rows, pictures and charts. Ideally, learners would have already attended Level 1 – Introduction and Level 2 – Intermediate courses.

## Course Outline

The course content will include the items listed below. Items not listed here are covered at another level. Some items may not be covered due to time constraints, but all will be covered in the notes.

**Items not listed here (including PowerPivot, Power Bi, VBA and Macros) are not covered on this course and are covered at a higher level.**

- Understand how to construct an effective database within Excel.
- Create Tables to futureproof data entry.
- Use Data Validation to force compliance with input standards.
- Creating dynamic dropdown lists.
- Using Named Cells and Named Ranges.
- Build Control Sheets to manage lists and key data variables.
- Create and use Pivot Tables.
  - Active Field Settings.
  - Creating Formulas in Pivot Tables.
  - Rearranging/filtering Pivot Tables.
  - Grouping data in Pivot Tables.
  - Slicers and timelines.
- Summarising data and presenting numbers effectively.
- Updating and Refreshing options.
- Working with totals and subtotals.
- Control Pivot Table options and report layout.
- Drill down to find the data behind the results.
- Create Pivot Charts.
- Integrate PivotTables and Databases to develop end-user dashboards, without the need for formulas, functions or VBA coding.

*Notes and exercise files will be provided online. The notes will cover all content listed above. Ongoing email support is offered to all participants.*