informatech



ACCOUNTING AND FINANCE | COURSE

Advanced Excel: Functions, Power Query and Power Pivots

UK
+44 33 000 111 90
info@informatech.co.uk
https://informatech.co.uk
63-66 Hatton Garden Hatton Garden
EC1N 8LE , London

NL
+31 85 74 444 46
info@infomatech.nl
https://infomatech.nl
Waarderweg 50 - 2031PB
Haarlem - Netherlands



Course content

Why Attend

The "Advanced Excel: Functions, Power Query, and Power Pivots" training course delves into advanced, and most recently added, Excel functions like XLOOKUP, TEXTJOIN, TEXTSPLIT, UNIQUE, SORT, and FILTER, enabling you to streamline your data tasks with ease. The course will cover Power Query to import and transform data from various sources, such as Excel files, folders, PDFs, and websites, preparing it for further analysis and reporting. Additionally, the course introduces Power Pivots, which teaches you how to create sophisticated data models, establish relationships between tables, and craft decisive DAX measures for complex calculations. This course is designed to elevate your Excel skills, enhance your productivity, and provide you with the tools needed for advanced data analysis and reporting.

This is a hands-on course with practical applications using Microsoft Excel 2021 or Office 365 throughout the five days. All examples, exercises, and cases are practiced in Excel.

By the end of the course, participants will be able to:

• Apply key Excel functions to prepare data for analysis and reporting

• Utilize pivot tables functions and calculations to generate a set of management and business analysis reports

• Utilize Power Query to clean up and prepare data for reporting

• Report and analyze big data using Power Pivots

• Utilize Excel automation solutions to speed up work

Accountants, senior and junior accountants, business analysts, accounting and finance professionals, business analysts, research professionals, and staff from any function who need to master and upgrade their skills in Excel functions, pivot tables, Power Query, and Power Pivots and work with big data analysis.

• Excel functions

• Power Query

• Practicing pivot tables

• Utilizing Power Pivot

• Reporting

• Analyzing business data



Course content

Course outline

Advanced Excel Functions and Features

- Table tool
- Naming cells and ranges
- Data validation using custom formulas
- Conditional formatting using formulas
- Functions:
- Text functions: TextSplit, TextJoin, TextAfter, TextBefore
- Trim, Clean, Find/Search, Len
- IF, IFS, and using AND & OR
- CountIF, SUMIF, and AverageIF
- XLookup and Index & Match
- Sequence, Unique, Sort, Sort By, and Filter
- Formula auditing

Advanced Techniques in Creating and Customizing Pivot Tables

- Number and cell format
- Report layout
- Grouping and un-grouping fields
- Default and customized sorting and filtering
- Sorting using a custom list
- Creating a calculated field
- Pivot charts
- Filtering using slicers and timelines



Course content

Course outline

- Slicer settings and connections
- Customizing reports using the GetPivotData option

Power Query: A Must-have Skill

- Get and transform: Link your Excel to external other data sources
- Excel files
- Text files
- Web
- Folder: all files and latest file
- Power Query to transform and clean up data:
- Naming, merging, splitting and removing columns
- Filtering rows
- Fill, Replace, Clean, Trim, and Format
- Adding Date columns
- Adding columns from examples
- Adding custom columns and conditional columns
- Using Parameter
- UnPivot data
- Grouping
- Combining queries:
- Append
- Merge: The different types of joining data

Power Pivot and the Data Model



Course content

Course outline

- Benefits and drawbacks of PowerPivot
- Merging data from multiple tables using relationships
- Creating better calculations using the DAX Formulas
- Using DAX to create calculated fields
- Formatting using DAX measures
- Date DAX measures
- Calculate and Related functions

Excel Automation Tools

- Data types
- Currencies
- Geography
- Organization
- Stocks
- Automate routine tasks with office scripts (e.g., formatting sheets)
- Practical examples of using Macros



Seminar dates

Available seminar dates

Live dates and pricing for Advanced Excel: Functions, Power Query and Power Pivots generated from the course details page.

Date	Location	Format	Fee
16 - 20 November 2026	Rome - Italy	Classroom	**€3,400.-**
7 - 11 December 2026	Istanbul - Turkey	Classroom	**€2,280.-**
11 - 15 January 2027	Barcelona - Spain	Classroom	**€3,080.-**
8 - 12 February 2027	Geneva - Switzerland	Classroom	**€4,200.-**
8 - 12 March 2027	Munich - Germany	Classroom	**€3,400.-**
12 - 16 April 2027	Amsterdam - Netherlands	Classroom	**€3,400.-**
10 - 14 May 2027	Istanbul - Turkey	Classroom	**€2,280.-**
14 - 18 June 2027	Rome - Italy	Classroom	**€3,400.-**
12 - 16 July 2027	Istanbul - Turkey	Classroom	**€2,280.-**
9 - 13 August 2027	Barcelona - Spain	Classroom	**€3,080.-**
13 - 17 September 2027	Geneva - Switzerland	Classroom	**€4,200.-**
11 - 15 October 2027	Munich - Germany	Classroom	**€3,400.-**
8 - 12 November 2027	Amsterdam - Netherlands	Classroom	**€3,400.-**
13 - 17 December 2027	Istanbul - Turkey	Classroom	**€2,280.-**

Live online option	Online delivery is available at €1,850.-.