Excel for ERP Analysts: PivotTables & Power Query Training Course

Professional Development Training Course Outline

Category	Enterprise Resource Planning (ERP)	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

The Excel for ERP Analysts training course is designed to empower professionals with essential skills in managing and analyzing large datasets in Enterprise Resource Planning (ERP) systems. In today's data-driven world, ERP analysts need to possess strong analytical capabilities to process, manipulate, and visualize data effectively. Excel for ERP Analysts: PivotTables & Power Query Training Course focuses on advanced Excel tools like PivotTables and Power Query, two critical functionalities for transforming raw data into meaningful insights. By mastering these features, analysts can streamline their workflows, improve reporting accuracy, and enhance decision-making processes.

As the role of ERP analysts evolves, proficiency in data analysis, automation, and data integration has become more crucial than ever. With PivotTables and Power Query, analysts can handle complex data with ease, generating actionable insights from transactional data within ERP systems. This course focuses on equipping professionals with the knowledge to work smarter and make data-driven decisions that align with business goals. Upon completion, participants will be ready to apply their learning in real-world ERP scenarios, utilizing Excel as a powerful tool to support the decision-making process across industries.

Programme Curriculum

Excel for ERP Analysts: PivotTables & Power Query Training Course

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10 days

Course Objectives

1. Understand the fundamentals of Excel PivotTables and how they support ERP data analysis.
2. Learn how to use Power Query for automating data transformation and integration in ERP systems.
3. Develop proficiency in creating complex PivotTable reports for summarizing large datasets.
4. Gain hands-on experience with data cleaning techniques using Power Query to prepare raw data for analysis.
5. Master the use of dynamic filters and slicers to make PivotTable reports interactive and user-friendly.
6. Implement advanced Power Query transformations such as merging, appending, and grouping data.
7. Learn how to automate repetitive tasks using Power Query's data refresh capabilities in ERP systems.
8. Understand how to link and consolidate data from multiple sources, including ERP databases and external systems.
9. Improve reporting efficiency by creating dynamic dashboards using PivotTables and Power Query.
10. Apply advanced Excel formulas like VLOOKUP, INDEX/MATCH, and IFERROR for data validation and error handling.
11. Develop the ability to manage large datasets efficiently using Excel's built-in tools like Power Query and PivotTables.
12. Implement data visualization techniques to effectively communicate findings from ERP systems.
13. Learn best practices for managing data integrity, ensuring that analysis is based on reliable and clean datasets.

Target Audience

1. ERP Analysts looking to enhance their data manipulation and reporting skills.
2. Business Intelligence (BI) Analysts seeking proficiency in Excel for data integration and reporting.
3. Data Analysts working with ERP systems who want to learn automation and streamline data processing tasks.
4. Financial Analysts who need to work with transactional data within ERP systems.
5. IT professionals supporting ERP systems and interested in improving data handling processes.
6. Supply Chain Analysts aiming to improve data-driven decision-making using Excel.
7. Managers responsible for overseeing ERP system integrations and reporting processes.
8. Professionals seeking a career shift into data analysis or ERP-focused roles, looking to gain hands-on Excel skills.

Course Modules

Module 1: Introduction to PivotTables

- What is a PivotTable and why it's essential for ERP analysis.
- How to create a basic PivotTable from a data range.
- Understanding PivotTable structure and design.
- Analyzing ERP data through basic aggregation techniques.
- Case Study: Analyzing sales data to identify trends and summarize financial performance.

Module 2: Advanced PivotTable Features

- Sorting and filtering within PivotTables.
- Grouping data by time periods, categories, and custom ranges.
- Using calculated fields to enhance reporting.
- Exploring PivotCharts for data visualization.
- Case Study: Creating a dynamic sales performance dashboard.

Module 3: Introduction to Power Query

- Overview of Power Query and its relevance to ERP analysts.
- Connecting Excel to external data sources like ERP databases.
- Basic data transformation techniques: filtering, sorting, and removing duplicates.
- Automating data imports with Power Query.
- Case Study: Importing and transforming financial transaction data for monthly reporting.

Module 4: Advanced Power Query Techniques

- Merging and appending queries to combine multiple datasets.
- Handling errors and missing data in Power Query.
- Using Power Query functions for advanced data transformations.
- Automating repetitive data workflows with Power Query.
- Case Study: Combining multiple source files into a unified ERP report.

Module 5: Data Cleansing and Transformation with Power Query

- Identifying and correcting data quality issues.
- Transforming text, dates, and numbers for consistency.
- Splitting and merging columns in Power Query.
- Handling case-sensitive data in ERP systems.
- Case Study: Standardizing customer data for CRM integration.

Module 6: Data Integration and Consolidation

- Combining data from multiple ERP modules using Power Query.
- Using Power Query to integrate data from external systems
- Aggregating and summarizing data for comprehensive reports.
- Merging ERP data with external market trends and forecasting data.
- Case Study: Consolidating financial data from different departments for company-wide reporting.

Module 7: Working with Multiple Tables in Excel

- How to manage relationships between multiple tables.
- Using Power Pivot to extend the functionality of PivotTables.

- Creating data models and relationships in Power Pivot.
- Integrating data from multiple sources into one unified PivotTable.
- Case Study: Building an interactive financial reporting dashboard using multiple data sources.

Module 8: Automating Reports with Power Query and PivotTables

- Setting up scheduled data refreshes for ERP data analysis.
- Automating report generation in Excel using Power Query.
- Creating self-refreshing PivotTable reports.
- Case Study: Automating the monthly financial report for management review.

Module 9: Visualizing Data with PivotTables and Power Query

- Designing interactive dashboards with PivotTables.
- Using Power Query to prepare data for visualization in Excel charts.
- Best practices for presenting ERP data visually.
- Case Study: Building an interactive sales and inventory dashboard.

Module 10: Handling Complex ERP Data Sets

- Managing large datasets and improving performance in Excel.
- Breaking down complex ERP data for easier analysis.
- Using advanced Excel formulas in combination with PivotTables.
- Case Study: Analyzing multi-year financial and operational data for trend analysis.

Module 11: Excel Formulas for ERP Analysts

- Leveraging Excel formulas like **VLOOKUP**, **SUMIF**, and **INDEX/MATCH**.
- Nested formulas and array functions for advanced data analysis.
- Using Excel's logical functions to clean and validate ERP data.
- Case Study: Validating and aggregating financial data using complex formulas.

Module 12: Using Excel for Financial Analysis in ERP Systems

- Conducting financial analysis through PivotTables and Power Query.
- Applying advanced Excel techniques to ERP financial data.
- Creating financial models for budgeting, forecasting, and reporting.
- Case Study: Preparing a quarterly budget report for an organization.

Module 13: Troubleshooting and Optimizing ERP Data in Excel

- Identifying and fixing common Excel errors in ERP datasets.
- Tips for improving Excel performance with large ERP datasets.
- Ensuring data accuracy and consistency in ERP reports.
- Case Study: Troubleshooting an inaccurate financial report generated from ERP data.

Module 14: Excel Dashboards and KPIs for ERP Analysts

- Building interactive Excel dashboards to monitor key performance indicators (KPIs).
- Using Power Query to refresh dashboard data automatically.
- Designing intuitive, easy-to-understand dashboards for stakeholders.
- Case Study: Building an executive-level dashboard for ERP-driven decision-making.

Module 15: Best Practices and Data Governance in Excel for ERP Systems

- Understanding data governance principles in the context of ERP data.
- Implementing version control for Excel reports.
- Securing sensitive ERP data within Excel files.
- Case Study: Implementing data governance practices for financial reporting.

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call +254769199797

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price

23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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