



Excel Reporting and Data Analysis Course

Outline: The ability to understand, communicate and derive value from data is a core skill that all businesses need today. This includes using data to; measure, monitor, manage and improve an organisation's performance.

Successful reporting and data analysis depend on; access to the data you need, accurate and up-to- date data, organising data into a meaningful and useful format, creating effective reports and knowing how to analyse data.

By using Excels Tools, this course will expose you to ways to; access, manage and derive value from your data. Actual business case studies and practical examples are used in the course.

Course length: 2-day Public course or 2 or 3-day Corporate Onsite Training

Pre-requisites: To have completed our Excel Advanced course or scored at least 30/50 on our Pre-Assessment test.

Complimentary Course: Our Excel Automation Course covers ways to automate the processes for acquiring and organising data, as well as advanced features for organising data. The Excel tools covered in our Excel Automation Course include; Power Query, Macros and VBA.

Content Covered:

Acquiring Data

- Start with the end in mind - what data do you need access to?
- Understand different data types and their uses when creating reports and analysing data
- Excel Data Tools to get data from different sources
- Excel Data Tools and Tricks to; identify & remove duplicate records, check if your data is correct, consistent and complete, clean up your data
- Preparing Data

Looking up and Combining Data

- Preparing Data in a layout that makes it easier; to work with, create; Reports, Pivot Tables, Pivot Charts and Dashboards
- Adding Additional Data

Manipulating Data

- Grouping, Sorting, Filtering, and Summarising Data
- Adding calculated fields, and what you must be aware of
- Enhancing your data with additional fields, including Targets/Thresholds and Data Flags

Visualising and Analysing Data – to help you identify; what is happening and why it is happening?

- Using the appropriate Functions, Tables or Charts to:
 - Summarise performance
 - Identify trends and patterns in your performance
 - Make Comparisons
 - Identify deviations/variances from expected performance
 - Evaluate % contribution to performance
 - Create and use distributions to evaluate performance
 - Rank Performance
 - Identify relationships between different measures
 - Make forecasts
- Creating Dashboards

Excel Tools and Features covered in this course include:

- Excel Tables
- Excel Charts
- Excel Pivot Tables
- Excel Slicers and Timelines
- Filtering, Sorting and Summarising Data
- Get Data Features
- Go to Special
- Data; Text to Columns, Removed Duplicates and Data Validation
- Conditional Formatting, including Identifying Duplicates and Conditional Formats on Pivot Tables
- SUM, COUNT, AVERAGE, MAX, MIN, STDEV, SUMIFS, COUNTIFS, IF, VLOOKUP, INDEX, MATCH, XLOOKUP
- Recording a Macro
- Integrating reports with Power Point

excel (verb) - *be exceptionally good at or proficient in an activity or subject.*
May this be the course that enables you to Excel.