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Excel for Data Analysis and Reporting

Unleash Your Analytical Potential in Just One Day

FA-0201 · One Day

Data & Analytics

Introduction

Welcome to the MS Excel for Data Analysis and Reporting course! In an era where data drives decision-making, mastering Excel's analytical and reporting capabilities is essential for professionals who want to extract insights and present data effectively.

This one-day course is designed to provide you with the skills needed to analyze data efficiently and create compelling reports. With over 30 years of industry experience, our instructor will guide you through practical exercises and real-world scenarios, ensuring that you gain hands-on experience with the tools most demanded by employers today.

Learning outcomes

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

- Understand and utilize Excel's data analysis tools.
- Create and manipulate PivotTables and PivotCharts for insightful data reporting.
- Apply advanced formulas and functions to analyze data.
- Design and format professional reports and dashboards.
- Use Excel's data visualization tools to present data effectively.
- Implement best practices for data cleaning and preparation.

Prerequisites

- Basic to intermediate proficiency in MS Excel.
- Understanding of basic formulas and functions.
- Familiarity with data organization and basic charting techniques.

Training outline

1. Introduction to Data Analysis in Excel

- Overview of data analysis and its importance
- Excel's role in data analysis
- Key features and tools for data analysis in Excel

2. Data Preparation and Cleaning

Importing data from various sources

- Importing from CSV, text files, and databases
- Using Power Query for data import

Data cleaning techniques

- Removing duplicates
- Handling missing values
- Text-to-columns and data splitting

Data transformation

- Using functions to manipulate data
- Applying filters and sorting for better data organization

3. Advanced Formulas and Functions for Data Analysis

Logical functions for data analysis

- IF, AND, OR, and nested IF statements

Lookup and reference functions

- VLOOKUP, HLOOKUP, and XLOOKUP
- INDEX and MATCH for complex lookups

Statistical functions

- AVERAGEIF, SUMIF, COUNTIF
- Using array formulas for advanced calculations

Text functions for data manipulation

- CONCATENATE, LEFT, RIGHT, MID, and TEXT

4. PivotTables and PivotCharts

Creating and formatting PivotTables

- Setting up a PivotTable from a data range
- Customizing fields and layout

Advanced PivotTable techniques

- Grouping data (by dates, numbers, and text)
- Calculated fields and items
- Using slicers and timelines for interactive filtering

Creating and customizing PivotCharts

- Linking PivotTables to PivotCharts
- Formatting and analyzing data visually

5. Data Visualization and Reporting

Designing effective dashboards

- Key principles of dashboard design
- Selecting the right visuals for your data

Creating charts and graphs

- Column, bar, line, and pie charts
- Advanced chart types (scatter plots, histograms, and sparklines)

Conditional formatting for data visualization

- Highlighting key data points
- Using data bars, color scales, and icon sets

6. Creating Professional Reports

Structuring your report

- Key components of a professional report
- Using templates and styles for consistency

Adding interactivity to reports

- Using form controls (drop-downs, checkboxes) for dynamic reports

Exporting and sharing reports

- Converting reports to PDF

- Sharing workbooks and protecting data

7. Practical Exercises and Real-World Applications

Hands-on exercises to reinforce learning

- Analyzing sales data with PivotTables and charts
- Creating a dynamic financial report with advanced formulas
- Designing an interactive dashboard for business metrics

Real-world scenarios and problem-solving

- Applying analytical techniques to industry-relevant tasks

8. Conclusion and Q&A

- Recap of key concepts covered
- Open floor for questions and clarifications
- Additional resources for further learning

By the end of this course, you will have the skills and confidence to perform data analysis and create professional reports using Excel. Join us to enhance your data-driven decision-making abilities and become an asset to your organization.

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