



# Excel Reporting and Data Analysis Course

## Overview

The ability to work with, understand and visualize data, in a way that provides meaningful and useful information and insights, is a key skill that all businesses need today. This includes using data to Measure, Monitor and Improve an organizations performance. Using MS Excel, this course covers the tools and principles to help you create reports and analyse data quickly, accurately, and effectively.

## Pre-requisites

To have attended or be familiar with the course content of our Intermediate Course or score at least 24/30 on our free online Pre-Assessment.

## Content Covered:

### ✔ Understanding Data:

Key data concepts to ensure that you have access to the data you need in the format you need.

- What is a Data Set, Data Field, and Data Row?
- The difference between a Measure Field (that quantifies something) and a Dimension Field (that gives context to your data set) and how do they affect the way you can summarise data.
- Adding new fields to your data set from a separate data set.
- Adding calculated fields to your data set.
- The importance of a unique record identifier to ensure you do not have duplicate data.

### ✔ Laying Out Data:

7 Golden rules, with examples, for laying out your data correctly. An absolute foundation for creating reports and analysing data quickly and effectively.

## ✓ Validating Data:

Like the saying goes “rubbish in, rubbish out”. In this section we look at MS Excel’s tools and techniques for checking and fixing your data to ensure that it is:

- Correct
- Consistent
- Complete
- Current
- Unique – in other words there are no duplicate records

## ✓ Summarising Data:

Using an Excel Table, we look at a practical example to show how a data set can be summarised to answer business questions, using:

- Sum, Count, Average, Minimum, Maximum, Average (while highlighting the difference between measure and dimension fields)
- Sort options
- Filter options

We will also look at the benefits and limitations of using an Excel Table to summarise data, as well as common mistakes users need to be aware of.

## ✓ Pivot Tables Introduction:

Pivot tables are probably one of the most useful, yet underutilised tools in MS Excel! Not only can they be used to create reports and analyse data very quickly and effectively, but they can also be used to summarise information, create lists, compare lists, and validate data with very little trouble and effort.

## ✓ Pivot Tables Advanced Features:

In this section we will look at MS Excel Advanced features that take reporting and Data Analysis to the next level! We will also look at best practices when creating Pivot tables as well as a few key things to watch out for!

## ✓ Pivot Charts:

Add and link a Pivot Chart to a Pivot table for visual representation of your data. We will also look at using the benefits of using different chart types, for the type of insight you are looking for, as well as best practices for creating effective charts.

## ✓ Dashboards:

Dashboards are a visual, interactive summary of important information for your business in one place – that can assist in answering key questions the business has. In this section we will look at some key principles for creating a dashboard using MS Excel Pivot Tables and Pivot Charts, with Slicers.

## ✔ Data Analysis:

Ever heard of concepts like “Slice and dice”, “drill down” etc. In this section we look at ways to analyse data to answer, “why something is happening in your business”. This includes:

- Identifying Trends and patterns
- Comparing performance
- Identifying variance / deviations from expected performance
- Identifying percentage contribution to performance
- Ranking Performance
- Identifying relationships in performance
- Using distributions to analyse performance

## ✔ Key Excel Tools and Functions Covered in this Course::

- Excel Tables
- Excel Pivot Tables
- Excel Pivot Charts
- Excel Slicers and Timelines
- Filtering, Sorting and Grouping Data
- Go to Special
- Excel Data Tools
- SUM, COUNT, AVERAGE, MAX, MIN, VLOOKUP, IFERROR, GETPIVOTDATA

**excel (verb)**

- be exceptionally good at or proficient in an activity or subject.

MAY THIS BE THE COURSE THAT ENABLES YOU TO EXCEL.