



DATA ANALYSIS

Business Intelligence & Data Analysis using Excel
Workplace Learning Pathway



COURSE CONTENTS

DATA ANALYSIS

- Data sources
- Transactional data lists in Excel
- Lookup lists in Excel
- Exported data
- External Data

WORKBOOK DESIGN

- Table and database best practice

DATA ENTRY

- Data entry shortcuts
- AutoFill
- Freeze Panes

DATA VALIDATION

- What is data validation?
- Types of data you can validate

FORMATTING DATA

- Basic cell formatting
- Basic number formatting
- Row and column format
- Alignment tools
- The Mini Toolbar
- Advanced formatting

STYLES & THEMES

- Themes
- Applying Styles

DATA TABLES

- Introducing the Data Table
- Advantages of Tables
- Auto-expansion
- Format as a Table
- Table styles
- Total row
- Sorting and filtering
- Calculated columns
- Table relationships

CONDITIONAL FORMATTING

- Highlight cells rules
- Top / bottom rules
- Data Bars, Colour Scales, Icon Sets
- Creating conditional formatting rules
- Conditional formatting Rules Manager
- Using multiple conditions
- Copying conditional formatting to other cells
- Filter and sort by colour

CHECKING FOR DUPLICATES

- Display duplicates
- Remove duplicates

ANALYSIS USING QUICK ANALYSIS

ANALYSIS USING VISUALISATION

- Inserting charts
- Customising charts
- New chart types
- Chart trendlines
- Sparklines
- Dashboards

ANALYSIS USING SUBTOTALLING TECHNIQUES

- Using Subtotal & Outline
- Using SUMIF
- Using Tables

ANALYSIS & VISUALISATION USING PIVOT TABLES

- Creating a Pivot Table
- Adding fields to the Pivot Table
- The Pivot Table ribbon tabs
- Update the Pivot Table
- Delete a Pivot Table
- Slicers
- Pivot Charts
- Typical examples of Pivot Table Visualisation

DATA ANALYSIS USING EXCEL

COURSE LENGTH

Recommended course duration is 1 day, typically 7.5 hours contact time. The course can also be delivered in a series of shorter sessions such as two to three half-day sessions

AIMS

This course has been designed to explain and demonstrate the following concepts:

- data management best-practice using Excel
- data integrity
- data presentation & visualisation

TARGET AUDIENCE

This course is an intermediate level course and assumes some knowledge of Microsoft Excel. It is suitable for participants who:

- want to collect high integrity data in a useable format
- need to format and present data in a meaningful way
- need to present data summaries using charts and dashboards
- want to improve their productivity by learning new techniques and shortcuts

OUTCOMES

By the end of this session you should be able to:

- design data tables to collect or import data
- create appropriate charts to visualise data
- summarise data to produce reports
- create interactive dashboards to display data stories in interesting ways

ABOUT US

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www.intelliteq.com.au | info@intelliteq.com.au | 0418 748 398 | PO Box 474, Edge Hill, Qld 4870