



# 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 & database best practice
- Table relationships

### EXCEL POWER TOOLS

- Excel add-ins
- Power Pivot
- Power Query
- Powermap
- Excel's bigger brother

### DATA ENTRY

- Data entry shortcuts
- Autofill
- Freeze Panes

### DATA VALIDATION

- What is Data Validation?
- Types of data you can validate

### FORMATTING DATA

- Basic cell & number formatting
- Row and column formatting
- Alignment tools
- The mini toolbar
- Advanced formatting

### STYLING DATA

- Applying styles

### DATA TABLES

- Advantages of tables
- 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
- The Rules Manager
- Using multiple conditions
- Copying conditional formatting to other cells

### CHECKING FOR DUPLICATES

- Display & remove duplicates

### USING QUICK ANALYSIS

### VISUALISATION

- Inserting & customising charts
- Selecting the correct chart type
- Chart trendlines
- Sparklines
- Map charts
- Bing maps
- 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
- Updating a Pivot Table
- Deleting a Pivot Table
- Slicers
- Pivot Charts
- Typical examples of Pivot Table visualisation

### 3D MAPS

### ANALYSIS USING POWER PIVOT

- Getting started with Power Pivot
- Load/get the data
- Creating table relationships
- Create Pivot Table

### CALCULATED COLUMNS & MEASURES (DAX)

- Add a calculated column
- Measures
- KPIs

### IMPROVING THE DATA MODEL

- Hiding tables and fields

# BUSINESS INTELLIGENCE & DATA ANALYSIS USING EXCEL

## COURSE LENGTH

Recommended course duration is 2 days, typically 15 hours contact time. The course can also be delivered in a series of shorter sessions such as three to four half-day sessions

## AIM

This course has been designed to allow participants to gain:

- an increased understanding of data management using Excel
- confidence with the data analysis features of Excel
- proficiency with simple Pivot and Power Pivot functionality

## TARGET AUDIENCE

This course is an advanced level course and assumes a sound knowledge of Microsoft Excel. It is suitable for participants who:

- already have proficiency with Excel fundamentals
- extensively work with data in spreadsheets and databases
- need to gain insights into their data
- need to visualise their data
- want to produce professional looking and functional dashboards and reports

## OUTCOMES

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

- describe the concepts of data management and analysis
- work with data tables in Excel
- create a pivot table and pivot chart summary
- use Power Pivot and Data Models
- use geo-spatial data to produce maps
- create an interactive dashboard

## ABOUT US

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