2 – DAY
MICROSOFT EXCEL DATA ANALYSIS AND DASHBOARD REPORTING

Introduction

Microsoft Excel is one of the most powerful and popular data analysis desktop application in the market today. By participating in this Microsoft Excel Data Analysis and Dashboard Reporting course you will gain the widely sought after skills necessary to effectively analyse large sets of data. Once the data has been analysed, clean and prepared for presentation, you will learn how to present the data in an interactive dashboard report.

The Excel Analysis and Dashboard Reporting course covers some of the most popular data analysis Excel functions and Dashboard tools, including;

·VLOOKUP() Function for Looking up Information
·INDEX()/MATCH() Functions a Powerful Alternative to VLOOKUP
·TEXT() Function for Formatting
·CHOOSE() for Ultimate Flexibility in Presenting Data
·Advanced Filtering
·Summarising Data with PivotTables and Pivot Charts
·Interactive Features to Create User Friendly Reports

and more…

Course Objectives

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

- Understand and identify the principles of data analysis
- Effectively summarise and present data clearly
- Use effective design principles when creating and presenting data
- Take full advantage of the built-in tools Microsoft Excel offers in order to analyse and build dashboard reports
- Build interactive dashboard reports
- Analyse Excel data using Excels TEXT based Functions

Methodology

PREREQUISITE

- Experience working with Microsoft Excel on a Windows system
- Concepts and features will also work with Excel 2016 (Professional), Office365, 2019

Who Should Attend?

- Experienced Microsoft Excel users who are looking to efficiently analyse large data sets and create dynamic dashboard reports

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Course Outline

MODULE 1: MANAGING RAW DATA

- Excel Versions and features
- Working with Raw Data
- Import External Data
  - Linking Data
  - Working with Live Data
- Data Housekeeping (Excel VS Power Query)
  - Text to Column Tricks
  - Troubleshooting merged data
  - Working with Unnecessary Spacing
  - Remove Duplicates
  - Creating Unique Values List
  - Troubleshooting Wrong Date and Time
  - Data Cleaning and Trimming
  - Working Text Functions
  - Validating Data
  - Simplified Data Structures
- Lab Assessment: Handling massive raw data

MODULE 2: WORKING WITH A SINGLE DATASET

- Transform Manual Database to Smart Datasets
- Smart Table Magics
- Smart Table Conditions
- Working with Data Sources
- Lab Assessment: Handling massive raw data

MODULE 3: WORKING WITH DATA ANALYSIS

- Preparing Functions
  - Statistical Functions
  - Logical Functions
- Quick Report with Pivot Tables
- Pivot Table Conditions
- Pivot Table Connection
- Working with Simplified Reports
- Lab Assessment: Formula VS Pivot table

MODULE 4: YOUR ROLE AS A COUNSELLOR

- Advance Sort and Filter
- Consolidating Data from same and multiple worksheets and workbooks.
- Linking Workbooks
- Lookup Functions
  - Vlookup VS Index Match
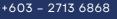 - Reference Functions
  - Information Functions

MODULE 5: DESIGN INTERACTIVE POWER BI REPORTS

- Pivot Table Data Sources
- Pivot Tables Queries and Solutions
- Pivot Table Data Grouping
- Pivot Table Subtotals
- Pivot Tables – Format Number
- Pivot Table Functions
- Pivot Table – Show Page Report Filter
- Pivot Table – Data Modelling
- Pivot Table – Row, Columns, Values and Filter Section
- Pivot Table – Rank and Comparison
- Pivot Table – Designs and Themes
- Pivot Tables – Complex Queries
- Pivot Tables – Options and Advance Format
- Lab Assessment: 10 Questions – 10 Quick Analysis

MODULE 6: PREPARING DATA MODELLING IN EXCEL

- Pivot Tables Data modelling
- Pivot Chart Queries
- Slicers and timelines
- Sparklines and Data bars
- Working with images and presentation tricks in Excel
- Preparing Interactive Dashboard
- Adding Other Objects
- Working with 1-screen Excel Dashboard View
- Link and Add Slicers and Timeline
- Working With Sparklines
- Working with Conditional Formatting

Course Outline

MODULE 7: CREATING INTERACTIVE DASHBOARD

- Sample of Dashboards
- Creating Templates
- Preparing Protections
- Working with multiple sources
- Live Data Dashboards
- Lab Assignment: Compiling multiple chart and prepare linked pivot table for future designs

MODULE 8: PREPARE AND DISTRIBUTE REPORTS USING MACRO

- Sharing files
- Emailing Dashboard
- Cloud Storage
- Lab Assessment: Dynamic Dashboard with extra macro inside