KOENIG SOLUTIONS · COURSE OUTLINE

AI Excel: Power Query, Forecast Sheet & Ideas

Learn to use Excel's AI features, from Power Query and Forecast Sheet to Ideas, for data preparation, analysis and visualization.

6	17
MODULES	TOPICS

COURSE OVERVIEW

This course covers the AI-powered features built into Excel, starting with an overview of tools such as Ideas, Data Types and Natural Language Queries. It then addresses data preparation and cleaning with Power Query and automatic data type recognition, followed by data analysis using Forecast Sheet, What-If Analysis and Ideas. Later modules cover automating tasks with AI-driven macros, Office Scripts and VBA, advanced visualization with Power BI integration, and real-world case studies applying these features to datasets.

WHO THIS COURSE IS FOR

Data Analysts | **Business Analysts** | **Excel Users** | **Report Developers** | **Financial Analysts**

LEARNING OBJECTIVES

- Explain the AI capabilities available within Excel
- Apply Power Query to prepare and clean data
- Identify data automatically using AI-driven data types
- Use Ideas to surface trends, patterns and summaries
- Build predictive models with Forecast Sheet
- Apply What-If Analysis to explore data scenarios
- Automate repetitive tasks using AI-driven macros and Office Scripts
- Integrate AI-driven Excel features with Power BI for visualization

COURSE SYLLABUS

6 Modules, 17 Topics

01

Introduction to AI in Excel

TOPICS

- Overview of AI capabilities in Excel
- Benefits of using AI-driven tools for data analysis
- **Introduction to the AI-powered features:** Ideas, Data Types, and Natural Language Queries

02

Data Preparation and Cleaning with AI Tools

TOPICS

- Utilizing Power Query for efficient data preparation
- **AI-driven data types:** Automatic recognition and classification of data (stocks, geography, etc.)
- Using Ideas to quickly identify trends, patterns, and summaries in data

03

Leveraging AI for Data Analysis

TOPICS

- Creating predictive models with Excel's built-in AI tools (e.g., Forecast Sheet)
- Using What-If Analysis with AI to explore different scenarios
- Applying data analysis techniques with Excel Ideas to gain deeper insights

04

Automating Tasks with AI and Macros

TOPICS

- Overview of automating repetitive tasks using AI-driven macros
- Using Office Scripts and VBA with AI features to enhance productivity
- Setting up AI-triggered workflows for real-time data updates and alerts

05

Advanced Visualization Techniques with AI Integration

TOPICS

- Creating dynamic charts and dashboards using AI recommendations
- Integrating AI-driven Excel features with Power BI for enhanced visualization
- Utilizing AI to generate insights for data storytelling and reporting

06

Real-World Applications and Use Cases

TOPICS

- Case studies on how AI in Excel is used in various industries
- Interactive exercises to apply AI features on real-world datasets

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

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Classroom Training | Live Online Classes (ILO) | Fly-Me-A-Trainer (FMAT) | Flexi (Self-Paced) | 1-on-1 Training

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