

KOENIG SOLUTIONS • COURSE OUTLINE

Advanced Excel with Power Query and Excel Features

Learn to build advanced Excel formulas, tables, charts and macros, then extract, clean and merge data using Power Query.

4 Days

DURATION

13

MODULES

74

TOPICS

COURSE OVERVIEW

This course covers advanced formulas, including named ranges, lookup functions, text functions and date functions, alongside working with lists, tables and conditional formatting. It then addresses data visualisation with charts, PivotTables and PivotCharts, as well as creating and troubleshooting macros. The course also covers Power Query, from navigating its interface to extracting data from tables, workbooks, databases, the web and folders. It closes with transforming and cleaning columns, merging and appending data from multiple sources, and automating queries to build reports.

WHO THIS COURSE IS FOR

Excel Users

Data Analysts

Report Developers

Business Analysts

Financial Analysts

LEARNING OBJECTIVES

- Apply advanced formulas such as VLOOKUP, HLOOKUP and IF
- Build and format tables, lists and conditional formatting rules
- Create and modify charts, PivotTables and PivotCharts
- Create and troubleshoot simple macros
- Explain the purpose and interface of Power Query
- Extract data from excel tables, databases, the web and folders
- Transform and clean columns by grouping, aggregating and unpivoting data
- Merge and append data from multiple workbooks and sources

13 Modules, 74 Topics

01

4 days

Advanced Formulas

TOPICS

- Using Named Ranges in Formulas
- Using Formulas That Span Multiple Worksheets
- Entering a Formula Using Data in Multiple Worksheets
- Using the IF Function
- Using the PMT Function
- Using the LOOKUP Function
- Using the VLOOKUP Function
- Using the HLOOKUP Function
- Using the CONCAT Function
- Using the TRANSPOSE Function
- Using the PROPER, UPPER, and LOWER Functions
- Using the PROPER Function
- Using the LEFT, RIGHT, and MID Functions
- Using the LEFT and RIGHT Functions
- Using Date Functions
- Using the YEAR, MONTH, and DAY Functions
- Creating Scenarios

02

Working with Lists

TOPICS

Converting a List to a Table · Removing Duplicates from a List · Sorting Data in a List · Filtering Data in a List · Adding Subtotals to a List

03

Visualizing Your Data

TOPICS

Inserting Charts · Using the Chart Recommendation Feature · Editing Charts · Using Chart Tools · Using the Quick Analysis Tool · Add and Format Objects · Create a Custom Chart Template

04

Working with Tables

TOPICS

Format Data as a Table · Move between Tables and Ranges · Modify Tables · Define Titles · Creating and Modifying a Table in Excel

05

Advanced Formatting

TOPICS

Applying Conditional Formatting · Using Conditional Formatting · Working with Styles · Creating and Modifying Templates

06

Create Advanced Formulas and Macros

TOPICS

Perform logical operations in formulas · Look up data by using functions · Use advanced date and time functions · Perform data analysis · Troubleshoot formulas · Create and modify simple macros

07

Manage Advanced Charts and Tables

TOPICS

Create and modify advanced charts · Create and modify PivotTables · Create and modify PivotCharts

08

What Is Power Query?

TOPICS

- What is Power Query and What Does it Do?
- Navigate and get a basic understanding of Power Query
- Understand Applied Steps in Query Settings

09

Extract Data

TOPICS

Extract data from excel table · Extract data from excel external workbooks · Extract data from databases · Extract data from web · Extract data from other source · From folder (multiple files)

10

Transform Columns & Add Columns

TOPICS

Use Group By to group source data · Use first row as headers · Aggregate column · Calculate columns · Use text functions in columns

11

Clean Data

TOPICS

- Change text to columns
- Remove unwanted columns and rows from data source
- Cope with formatting issues
- Manage are source data cleaning issues
- Unpivot data
- Replace errors or values in columns

12

Merge & Append

TOPICS

- Merge data from an Excel workbook
- Merge data from multiple Excel workbooks
- Merge data from multiple data sources
- Append data from Excel worksheets and multiple data sources

13

Automate Queries

TOPICS

- Understand Power Query technics to automate queries
- Understand how to create simple functions in Power Query
- Create Dashboard/Report from Power Query data

NOTES

- Source includes a separate line 'Microsoft Copilot for Excel' after Module 13 with no accompanying content, topics, or module structure; could not be placed as a module since it has no body.

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

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

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