KOENIG SOLUTIONS · COURSE OUTLINE

Excel Data Analysis and Visualization

Learn to validate, structure, analyse and visualize Excel data using tables, pivot tables, macros and Copilot.

8	43	1
MODULES	TOPICS	HANDS-ON EXERCISE

COURSE OVERVIEW

This course covers data validation techniques and referencing methods, followed by working with structured Excel tables. It then addresses analysis tools such as What If Analysis, Goal Seek, Data Tables, Pivot Tables and Pivot Charts, and Power Query, alongside recording, editing and managing Excel macros. It also covers preparing data for charts, choosing and creating appropriate visualizations, building dashboards, and linking workbooks with external data sources and the web. The course concludes with an introduction to Microsoft Copilot for Excel.

WHO THIS COURSE IS FOR

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

LEARNING OBJECTIVES

- Apply data validation rules including lists and custom criteria
- Distinguish between absolute, relative and structured referencing
- Manage data using structured Excel tables
- Perform What If Analysis using Scenarios, Goal Seek and Data Tables
- Build Pivot Tables and Pivot Charts with calculated fields and filters
- Record, edit and manage security of Excel macros
- Create charts and dashboards from prepared data
- Link workbooks to external data sources and the web

COURSE SYLLABUS

8 Modules, 43 Topics

01

Data Validation

TOPICS

Whole numbers and decimals · Date and time validation · Text length · Excel data validation list (drop-down) · Custom data validation rules · Referencing in Excel

02

Referencing

TOPICS

Absolute referencing · Relative referencing · Structured reference

03

Tables

TOPICS

Working with Structured tables · Why you should use tables · Elements of an Excel table · Managing data in an Excel table · Using structured references with Excel tables

04

Analysis

TOPICS

- What If Analysis
- Scenarios
- Custom Views
- Reports
- Goal Seek
- Data Tables
- Pivot Tables and Pivot Charts
- Preparing data for use with Pivot Table
- Formatting a PivotTable
- Working with Calculated Fields
- Grouping Data
- Filters and Advanced Filter
- Advanced Data Field Settings
- Creating Pivot Chart
- Power Query

05

Excel Macros

TOPICS

Recording Macros · Copy a Macro from Workbook to Workbook · Running Macros · Editing Macros · Adding Macros to the Quick Access Toolbar · Managing Macro Security

EXERCISE

- Recording a Macro

06

Charts and Visualizations

TOPICS

Preparing data for charts · Choosing appropriate chart · Creating Different Charts · Dashboards · Working External Data

07

Linking Workbooks

TOPICS

Working with non-legacy databases · Extracting Data from the Web · Creating Collector Models

08

Microsoft Copilot for Excel

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.

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