

KOENIG SOLUTIONS • COURSE OUTLINE

Advanced Excel Functions and Data Management

Learn to apply advanced Excel functions, manage data and automate tasks with Power Query, PivotTables and macros.

10

MODULES

45

TOPICS

COURSE OVERVIEW

This course covers advanced Excel functions such as lookup, sum product and logical statements, along with date functions and time value of money calculations. It then addresses data quality tools including data validation and duplicate removal, followed by data management features such as scenarios, data tables and the Solver tool. Power Query is introduced for connecting and transforming data, alongside PivotTables, Pivot Charts, worksheet auditing, workbook protection, advanced conditional formatting and filtering. The course closes with recording, editing and running macros.

WHO THIS COURSE IS FOR

Data Analysts

Financial Analysts

Business Analysts

Excel Users

Administrative Staff

LEARNING OBJECTIVES

- Apply advanced lookup functions such as XLookup, Index and Match
- Build logical statements using nested IF and countif functions
- Calculate present value and internal rate of return
- Apply data validation and remove duplicate data
- Create scenarios, data tables and use the Solver tool
- Transform and load data using Power Query
- Build PivotTables and Pivot Charts with slicers
- Record, edit and run macros

10 Modules, 45 Topics

01

Some Advanced Functions

TOPICS

- Lookup Functions (XLookup, Index, Match)
- Vlookup with Array Function
- Vlookup with Column Function
- Sum Product Function
- Logical Statements (Nested IF/sumif/sumifs/countif/countifs)
- Using Date Functions
- Using the YEAR, MONTH, and DAY Functions

02

Time Value for Money

TOPICS

NPV and PV for calculating Present Value · Internal Rate of Return

03

Improve Data Quality

TOPICS

- **Data Validation:** Restrict the type of data that can be allowed in a cell
- **Remove Duplicates:** Eliminate duplicate row data

04

Data Management

TOPICS

Creating and Understanding Scenario · Working with Data Table · Working with Solver Tool

05

Connecting & Transforming Data with Power Query

TOPICS

Introduction · Getting to Know Power Query in Excel · Exploring Excel's Power Query Editor · Power Query Data Loading Options

06

Manage Advanced Charts and Tables

TOPICS

Create and modify PivotTables & Pivot Charts

CREATING PIVOT TABLES

More PivotTable Functionality · Inserting Slicers · Multi-Select Option in Slicers · PivotTable Enhancements

WORKING WITH PIVOT CHARTS

Inserting Pivot Charts · Using the Chart Recommendation Feature · Editing Charts · Using Chart Tools

07

Auditing Worksheets

TOPICS

Tracing Precedents · Tracing Dependents · Showing Formulas

08

Working with Others

TOPICS

Protecting Worksheets and Workbooks · Password Protecting a Workbook · Password Protecting a Worksheet · Password Protecting Ranges in a Worksheet · Marking a Workbook as Final

09

Some Advanced Functionality

TOPICS

Advanced Conditional Formatting · Advance Filter

10

Recording and Using Macros

TOPICS

- Recording Macros
- Recording a Macro
- Running Macros
- Editing Macros
- Assigning short cut key for Macro
- Assigning Macro to a shape
- Adding Macros to the Quick Access Toolbar
- Adding a Macro to the Quick Access Toolbar

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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Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

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