KOENIG SOLUTIONS · COURSE OUTLINE

Analyzing Data in Excel Using ChatGPT, Co-Pilot and More

Leveraging AI for Enhanced Productivity in Excel and Data Analysis

1 Day	12	34
8 HOURS A DAY	MODULES	TOPICS

COURSE OVERVIEW

This course covers using ChatGPT within Excel, starting with an introduction to ChatGPT and its capabilities before applying it to common, conditional, text, date and advanced Excel functions, as well as generating VBA macro code and enhancing productivity through tasks such as converting PDF to Excel, merging data and combining sheets. It then covers Co-Pilot in Excel, including smart formula assistance, generating insights from data, data management tasks such as highlighting, filtering and sorting, visualising data with charts, and generating VBA macro code. Finally, it covers Power BI for data analysis, including getting started with Power BI Desktop and Service, using Power Query to connect, transform and combine data, building data models and relationships with DAX, and visualising data through interactive reports, map visuals, slicers and report pages.

WHO THIS COURSE IS FOR

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

LEARNING OBJECTIVES

- Explain what ChatGPT is and its key capabilities and limitations
- Apply ChatGPT to common, conditional and text Excel functions
- Generate VBA macro code and other outputs using ChatGPT 4
- Apply Co-Pilot to perform simple and conditional Excel functions
- Interpret insights and answers generated from data with Co-Pilot
- Manage data in Excel using Co-Pilot for filtering and formatting
- Connect and transform data sources using Power Query in Power BI
- Build data models and interactive visualisations in Power BI

COURSE SYLLABUS

12 Modules, 34 Topics

01

Part 1: Using ChatGPT in Excel

02

Introduction to ChatGPT

TOPICS

What is ChatGPT? · Key Capabilities, Examples, and Limitations · How to Access ChatGPT · Difference Between ChatGPT 3.5 & ChatGPT 4

03

Excel Functions with ChatGPT

WORKING WITH CHATGPT 3.5

- **Common Functions:** SUM, AVERAGE, MAX, MIN, COUNT
- Conditional Function: IF
- **Text Functions:** PROPER, LOWER, UPPER, LEFT, RIGHT
- **Date Functions:** DATEDIF, NETWORKDAYS
- **Advanced Functions:** SUMIF, COUNTIF, VLOOKUP

WORKING WITH CHATGPT 4

- Assistance with Common and Logical Functions
- Generating VBA Macro Code
- **Productivity Enhancements with ChatGPT:** Converting PDF to Excel/CSV
- **Productivity Enhancements with ChatGPT:** Merging and Organizing Data: Tables, Sheets, Sorting, Filtering
- **Productivity Enhancements with ChatGPT:** Highlighting Important Data
- **Productivity Enhancements with ChatGPT:** Combining Data Across Sheets

04

Part 2: Using Co-Pilot in Excel

05

Smart Formula Assistance with Co-Pilot

TOPICS

Performing Simple and Conditional Functions · Generating Insights from Data · Asking Questions Based on Data

06

Data Management with Co-Pilot

TOPICS

- Highlighting and Formatting Data
- Filtering (Standard and Advanced) and Sorting Data
- Visualizing Data with Charts

07

Advanced Features with Co-Pilot

TOPICS

Generating VBA Macro Code

08

Part 3: Using Power BI for Data Analysis

09

Getting Started with Power BI

TOPICS

- **Introduction to Power BI:** What It Is and Why Use It
- Power BI Desktop vs Power BI Service
- Connecting Power BI to Excel Data

10

Power Query in Power BI

TOPICS

- **Connecting to Various Data Sources:** Excel, CSV, Web, etc.
- Transforming and Cleaning Data with Power Query
- Shaping and Combining Data from Multiple Sources
- Loading Data to Power BI for Analysis

11

Data Modelling in Power BI

TOPICS

Creating Data Models and Relationships · Using DAX for Calculations

12

Visualizing Data with Power BI

TOPICS

- **Building Interactive Reports:** Charts, Graphs, and KPIs
- Using Map Visuals and Slicers
- Adding Report Pages for Better Insights

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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