

KOENIG SOLUTIONS • COURSE OUTLINE

Excel Power Techniques: Automation, Dashboards & Lookups

Learn to build data validation, lookups, dashboards and macros to automate and analyse Excel workbooks.

8 Hours

DURATION

6

MODULES

24

TOPICS

6

HANDS-ON ACTIVITIES

COURSE OVERVIEW

This course covers data validation and dynamic drop-down lists, followed by date and time calculations using functions such as NETWORKDAYS and WORKDAY. It then examines conditional and database functions including SUMIFS, COUNTIFS, DSUM and DCOUNT, before moving into lookup and reference functions such as VLOOKUP, HLOOKUP, XLOOKUP and IFERROR. It continues with building dashboards using Power Query and Power Pivot, including PivotTables, charts and slicers, and finishes with recording and running macros and an introduction to VBA.

WHO THIS COURSE IS FOR

Data Analysts

Report Developers

Business Analysts

Finance Professionals

Office Administrators

LEARNING OBJECTIVES

- Apply data validation rules and dynamic drop-down lists
- Calculate workday-based dates using NETWORKDAYS and WORKDAY
- Build conditional and database formulas such as SUMIFS and DCOUNT
- Apply lookup functions including VLOOKUP, HLOOKUP and XLOOKUP
- Handle formula errors using IFERROR
- Build interactive dashboards with Power Query and Power Pivot
- Summarise data using PivotTables, charts and slicers
- Automate repetitive tasks by recording and editing macros

CERTIFICATION

End of Course Add-ons:

Practice File Set + Sample Dashboard Template

Certificate of Completion Template

How the Course Is Taught

Hands-On + Demo + Practice Activities

COURSE SYLLABUS

6 Modules, 24 Topics

01

1 hour

Activity

Data Validation & Drop-Down Controls

TOPICS

- What is Data Validation & its practical use
- Setting Validation Criteria (text, numbers, dates, custom formulas)
- Creating Dynamic Drop-down Lists
- Preventing invalid inputs with messages & alerts

02

1 hour

Activity

Mastering Dates and Time Calculations

TOPICS

- Formatting date/time values for reports
- Calculating days between two dates
- Using NETWORKDAYS and WORKDAY for workday math
- Offsetting dates with only business days

03

1 hour

Activity

Using Conditional & Database Functions

TOPICS

- Overview of conditional formulas like IF, SUMIFS, COUNTIFS
- Setup required for database functions (DSUM, DCOUNT)
- Performing calculations with multiple criteria

04

1.5 hours

Activity

Lookup & Reference Functions Deep Dive

TOPICS

- Basics of lookup formulas: VLOOKUP, HLOOKUP, XLOOKUP
- Exact vs Approximate match logic
- Error-handling with IFERROR
- Practical lookup situations and nested functions

05

2 hours

Activity

Dashboards with Power Query & Power Pivot

TOPICS

- Intro to Power Query: loading, cleaning, and combining data
- Power Pivot: creating relationships and data models
- Summarizing data via PivotTables from Power Query/Pivot output
- Adding visuals: Charts, Slicers, Conditional Formatting
- Building an Interactive Dashboard

06

1.5 hours

Activity

Automating with Macros

TOPICS

- Enabling and saving files with Macros
- Recording Macros for repetitive tasks
- Assigning buttons to run Macros
- Basic introduction to VBA and editing recorded code

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
01	Data Validation & Drop-Down Controls	Create a form that uses drop-downs and data entry restrictions for clean inputs
02	Mastering Dates and Time Calculations	Create a task timeline sheet that auto-calculates start/end dates skipping weekends
03	Using Conditional & Database Functions	Build a mini report that filters and calculates results using criteria-based formulas

#	MODULE	ACTIVITY
04	Lookup & Reference Functions Deep Dive	Build a price-checking tool and product search using dynamic lookup combinations
05	Dashboards with Power Query & Power Pivot	Create a KPI dashboard from raw sales data with slicers and interactivity
06	Automating with Macros	Record a macro for formatting reports, assign it to a button, and explore the VBA editor

WHAT IS INCLUDED

Everything You Need to Succeed

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