KOENIG SOLUTIONS · COURSE OUTLINE

Excel with Copilot

Learn to analyse and manage Excel data using functions, tables and pivot tables, then boost productivity with Copilot.

4 Hours	5	20	2
DURATION	MODULES	TOPICS	HANDS-ON ACTIVITIES

COURSE OVERVIEW

This course covers core Excel functions such as SUM, AVERAGE and text functions, along with formatting data as tables. It then moves to advanced functions for data analysis, including SUMIF, COUNTIF, VLOOKUP, HLOOKUP and XLOOKUP, followed by creating and customising pivot tables for deeper analysis. Data formatting techniques such as conditional formatting and named ranges are also covered. The course concludes with using the free version of Excel Copilot to summarise data, get formula suggestions and validate Copilot outputs against pivot tables or formulas.

WHO THIS COURSE IS FOR

Data Analysts | **Business Analysts** | **Excel Users** | **Office Administrators** | **Finance Professionals**

LEARNING OBJECTIVES

- Apply basic functions such as SUM, AVERAGE, MAX and MIN
- Format data as tables and manage table structure
- Apply conditional sum and count functions using SUMIF and COUNTIF
- Compare VLOOKUP, HLOOKUP and XLOOKUP for data lookups
- Build pivot tables and customise pivot layouts
- Apply conditional formatting rules and styles
- Create named ranges for simpler formula management
- Evaluate Copilot outputs against pivot tables or formulas

COURSE SYLLABUS

5 Modules, 20 Topics

01

Basic Excel Functions & Data Management

BASIC FUNCTIONS

SUM, AVERAGE, MAX, MIN · UPPER, LOWER, PROPER

FORMAT AS TABLE

Benefits of formatting data as a Table · Moving between data and tables · Creating and modifying tables · Table structure and headers

02

Advanced Functions for Data Analysis

SUMIF AND COUNTIF

- Applying conditional sum and count functions

VLOOKUP & HLOOKUP

- Using lookup functions to find and match data

XLOOKUP

- Introduction to XLOOKUP as a modern and flexible alternative

03

Advanced Data Analysis with Pivot Tables

PIVOT TABLES

Creating pivot tables · Customizing pivot layouts · Analysing data using pivot tables

04

Data Formatting & Formula Management

CONDITIONAL FORMATTING

- Applying conditional formatting
- Using built-in rules and styles

DEFINE NAMES

- Creating named ranges for simpler formula management

05

Excel Copilot (Free Version) - Quick Productivity Boost

COPILOT OVERVIEW (FREE VERSION)

What Copilot can do in Excel for Web · Key limitations vs Copilot Pro

USING COPILOT FOR ANALYSIS & FORMULAS

Asking Copilot to summarize data · Getting formula suggestions (SUMIF, XLOOKUP) · Validating Copilot outputs

HANDS-ON EXERCISE

01 Ask Copilot 2-3 business questions on a dataset

02 Cross-check one insight using Pivot Tables or formulas

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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