

Excel for Business Analysts

GoSkills online course syllabus

Skill level

Beginner

Lessons

52

Accredited by

CPD

Pre-requisites

Experience with Excel recommended

Versions supported

2021, 365

Video duration

5h 43m

Estimated study time

22h

Instructor

Deborah Ashby

Introduction

1

Course Introduction

A introduction to the course and your host.

2

How Excel is Used by Business Analysts

Learn about the role of the Business Analyst and how Excel is used to drive business decisions.

3

Useful Excel Efficiency Tips and Shortcuts

Learn how to improve efficiency and productivity by utilizing Excel shortcuts.

Create Better Spreadsheets

4

The Golden Rules of Spreadsheet Design

Explore the golden rules when it comes to designing and organizing spreadsheets effectively.

5

Naming Conventions and Version Control

Explore how to standardize file, tab, table and chart naming conventions as well as how to implement a basic version control system.

6

Give Instruction with Summary Sheets

Create a summary sheet for the workbook to let others know how the spreadsheet should be used and managed.

7

Use Color and Cell Styles to Assist with Organization

Learn how to use color and pre-defined cell styles to add structure to the spreadsheet.

- 8** **Methods to Minimize Spreadsheet Errors: Part 1 - Cell Linking**
Explore some of the methods available in Excel to cut down on the amount of input errors and protect important formulas.
- 9** **Methods to Minimize Spreadsheet Errors: Part 2 - Data Validation**
Data Validation helps us control what information is going into the spreadsheet.
- 10** **Methods to Minimize Spreadsheet Errors: Part 3 - Protection**
Learn how to apply protection at the workbook, worksheet, and cell level to prevent unwanted changes.

Extend the Power of Lookups

- 11** **Lookup Information with Duplicate Lookup Values**
Use VLOOKUP to find information in a table when the lookup value is duplicated.
- 12** **Perform Complex Lookups with INDEX, MATCH and Data Validation Lists**
Create a Data Validation List and use it to perform a flexible lookup using INDEX and MATCH.
- 13** **Two-Way Lookups with INDEX and MATCH or XLOOKUP**
Utilize INDEX and MATCH or XLOOKUP (Microsoft 365, 2019, 2021) to perform a lookup with two criteria.

Excel Lists

- 14** **Compare Lists with Formatting**
Learn how to compare two lists and highlight differences using formatting.
- 15** **Compare Lists with FILTER, COUNTIF and NOT**
Explore one of the newer functions in Excel, FILTER, and learn how to use it with COUNTIF to compare two lists.
- 16** **Compare Lists with VLOOKUP, VSTACK and UNIQUE**
Use the UNIQUE function to return duplicate values from two lists.
- 17** **Highlight Rows in a List with Conditional Formatting and Data Validation**
Create a new conditional formatting rule using a formula that highlights the row if a duplicate is found.

- 18** **Create Multiple, Dependent Data Validation Lists**
Create multiple data validation drop-down lists that change depending on the selection in the previous list.
- 19** **Create Dynamic Checklists**
Create interactive, dynamic checkboxes that harness the power of form controls and conditional formatting.
- 20** **5 Uses of Excel's 'Superhero' Flash Fill**
Learn the different ways Flash Fill can be used to combine, split and change items in Excel lists.

Import and Prepare Data for Analysis

- 21** **Import Data from the Web**
Learn the quick and easy way to import data from the web.
- 22** **Combine Data with CONCAT and TEXTJOIN**
Explore how the CONCAT and TEXTJOIN functions can be used to combine data that's split across multiple columns.
- 23** **Methods for Splitting Data**
Explore the numerous methods in Excel for splitting data across multiple columns.
- 24** **Data Cleaning Techniques**
Tidy up data by removing erroneous spaces, random line-breaks and weird non-printing characters by combining 3 useful Excel text functions.
- 25** **New Text Manipulation Functions**
Take a first look at Excel's new set of functions for manipulating text. (Microsoft 365, Excel 2021 only)
- 26** **New Array Manipulation Functions**
Take a first look at Excel's new set of functions for manipulating arrays. (Microsoft 365, Excel 2021 only)

Advanced Pivot Table Techniques

- 27** **Pivot Table Recap**
A quick recap on the basics of Pivot Tables.

28 **Advanced Pivot Table Tips and Tricks - Part 1**
Explore advanced Pivot Table Tips and Tricks to supercharge your analysis skills.

29 **Advanced Pivot Table Tips and Tricks - Part 2**
More advanced PivotTable Tips and Tricks to supercharge your analysis skills.

30 **Combine Multiple Data Sources with Power Pivot - Part 1**
Got multiple datasets stored in different worksheets or workbooks that you want to analyze in one Pivot Table? If so, Power Pivot is your savior.

31 **Combine Multiple Data Sources with Power Pivot - Part 2**
Let's continue our look at Power Pivot and how to combine multiple data sources.

Visualize Data with Charts and Diagrams

32 **Choose the Right Chart Type**
Understand that not all charts are created equal and select the most appropriate chart type for your data.

33 **Create a Map Chart**
Learn how to create a gradient map chart using Pivot Table data.

34 **Create a Histogram Chart**
Create a histogram chart to display chart data grouped into bins.

35 **Advanced Chart Formatting**
Learn some advanced chart formatting techniques that tell the visual story of your data in a modern and effective way.

36 **Create SmartArt Diagrams**
Use SmartArt to quickly create flow charts and process diagrams.

37 **Create In-Cell Charts: Sparklines and Data Bars**
Represent values and trends in a cell using Sparklines and Data Bars.

38 **Create In-Cell Visualizations: The REPT Function**
Create in-cell visualizations using the REPT function.

Present Key Metrics with Dashboards

- 39** **What is an Interactive Dashboard?**
Understand what a dashboard is and how you should prepare before creating a dashboard.
- 40** **Create and Format Multiple Pivot Tables and Pivot Charts: Part 1**
Create multiple Pivot Tables and Pivot Charts to display key metrics that are of important to your audience.
- 41** **Create and Format Multiple Pivot Tables and Pivot Charts: Part 2**
Continue learning about how to use Pivot Tables and Pivot Charts to display key metrics.
- 42** **Prepare a Calculations Sheet**
Create a calculations worksheet and use formulas to extract dashboard information from the source data.
- 43** **Dashboard Design**
Use formatting techniques to design a branded, consistent looking dashboard.
- 44** **Bring it all Together and Keep Information Updated**
Bring all charts and calculations together on the dashboard and understand how to keep the dashboard updated when new data is added to the source.

Forecasting

- 45** **Create a Linear Forecast with Forecast Functions**
Understand how forecasting works and how to forecast data into the future using Excel functions.
- 46** **Create a Seasonal Forecast with Forecast Functions**
Learn how to create a seasonal forecast using forecast functions.
- 47** **Add Confidence Levels**
Calculate the upper and lower confidence bound.
- 48** **Quick Forecasts**
Create simple and quick forecasts using the Forecast Sheets utility.

What-If Analysis Tools

49 **What-If Analysis: Goal Seek**
Start with a target value and work backwards to find what needs to change to achieve your goal.

50 **What-If Analysis: Scenario Manager**
Use Scenario Manager to see what your data will look like if conditions change.

51 **What-If Analysis: Data Tables**
Use Data Tables predict values based on a set of conditions.

Course Close

52 **Course Close**
Course wrap up, review and goodbyes.

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