MERCURY

AI-Enhanced Data Analysis & Business Reporting Using Excel for Administrators

8 – 12 February 2027
London (UK)



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Ref: 121465_1033777 **Date:** 8 – 12 February 2027 **Location:** London (UK) **Fees:** 5900 Euro

Introduction

This AI-Enhanced Data Analysis & Business Reporting Using Excel for Administrators course empowers administrative professionals with advanced capabilities in data analysis, business reporting, and AI-supported decision-making using Microsoft Excel. It bridges traditional Excel functions with modern AI-driven tools to streamline reporting workflows and improve accuracy in handling organizational data. Participants will learn how to transform raw, unstructured datasets into structured, meaningful insights to support executive-level reporting and operational efficiency. The program emphasizes a practical, theory-based understanding of data management techniques combined with intelligent automation concepts. It focuses on enhancing reporting speed, accuracy, and consistency through AI-assisted Excel functionalities. Learners will support data-driven administration in modern digital workplaces.

Targeted Groups

This AI-Enhanced Data Analysis & Business Reporting Using Excel for Administrators training targets professionals seeking knowledge and skills:

- Administrative officers manage daily organizational data tasks and reporting workflows.
- Office administrators are responsible for structured reporting and documentation.
- Data entry specialists handling large and unstructured datasets.
- Junior data analysts working with Excel-based reporting systems.
- Finance assistants support budgeting and reporting tasks.
- HR administrators manage employee data and reporting metrics.
- Supervisors oversee operational performance reports and summaries.
- Marketing coordinators analyze campaign data and performance results.
- Sales support teams are preparing structured sales performance reports.
- Professionals aiming to enhance Excel data analysis and AI-assisted reporting skills.

Course Objectives

Participants will achieve the following objectives by completing the AI-Enhanced Data Analysis & Business Reporting Using Excel for Administrators course:

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- Develop advanced Excel skills for organizing, cleaning, and analyzing administrative datasets.
- Apply AI-assisted techniques to automate reporting tasks and improve data accuracy.
- Build structured business reports using formulas, pivot tables, and dynamic dashboards.
- Analyze data patterns using statistical and logical Excel functions for better decision-making.
- Integrate AI tools to support predictive insights and data interpretation processes.
- Enhance data visualization techniques to produce clear, professional reports.
- Improve efficiency in handling large datasets from multiple sources across organizations.
- Apply advanced Excel functions for filtering, validation, and data transformation.
- Strengthen reporting accuracy through automated calculations and smart formulas.
- Support managerial decision-making through structured and AI-enhanced reporting outputs.

Targeted Competencies

Participants will gain the following competencies during the AI-Enhanced Data Analysis & Business Reporting Using Excel for Administrators program:

- Efficiently processing and organizing large administrative datasets.
- Creating structured reports using advanced Excel functions and formulas.
- Applying AI-assisted Excel tools for automation and insight generation.
- Designing pivot-based reporting systems for dynamic data analysis.
- Using logical and statistical functions for business interpretation.
- Enhancing data visualization for professional reporting outputs.
- Managing data validation, cleaning, and transformation processes.
- Building interactive and flexible reporting models for administrative needs.

Studying Scenarios

In this AI-Enhanced Data Analysis & Business Reporting Using Excel for Administrators training, participants develop skills through the following scenarios:

- Cleaning and structuring raw administrative data into usable formats.
- Creating automated monthly and quarterly performance reports using Excel tools.
- Building AI-supported dashboards for tracking organizational KPIs.
- Analyzing sales, HR, or financial data to identify trends and patterns.
- Designing pivot-based summaries for executive-level reporting decisions.

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Course Content

Unit 1: Data Analysis Techniques and AI-Enhanced Excel Tools

- Collect data from multiple files and integrate AI-assisted data sources.
- Validate and review data using intelligent lists, dates, and automated checks.
- Utilize row functions effectively for structured data processing.
- Manage cells using left, right, mid, concatenate, and value tools for data refinement.
- Name cells and ranges for efficient AI-supported referencing and automation.
- Employ advanced functions: subtotal, sumif, sumifs, sumproduct, count, countif, countifs.
- Search for data, text, and values using vlookup and AI-assisted lookup suggestions.
- Master table techniques enhanced with smart Excel analysis tools.
- Break down data into structured formats such as dates, weeks, and categories.
- Convert text to columns and clean data using trim, len, and AI-based correction logic.
- Handle text and numerical transformations using replace, find, and substitute functions.
- Perform intelligent text adjustments for improved reporting accuracy.

Unit 2: The 19 Essential Rules for Pivot Table Mastery with AI Insights

- Create pivot tables from structured and unstructured datasets with AI guidance.
- Apply advanced number formatting techniques for business clarity.
- Design report layouts with dynamic and AI-optimized styles.
- Sort data in multiple intelligent patterns for improved insights.
- Filter values and labels using advanced analytical logic.
- Expand and summarize reports using adaptive AI-driven configurations.
- Summarize data using sum, average, minimum, maximum, and count functions.
- Display percentages for proportional business interpretation.
- Explore pivot customization tools for enhanced reporting accuracy.
- Insert formulas within pivot tables for deeper analytical modeling.
- Analyze data using built-in Excel intelligence features.
- Copy pivot tables while preserving structure and formatting.
- Create pivot charts to support visual AI-driven storytelling.
- Name dynamic charts for automated updates and tracking.
- Use slicers for interactive filtering and intelligent segmentation.
- Display filter pages for segmented reporting outputs.
- Link pivot tables to PowerPoint for automated presentation reporting.
- Apply conditional formatting to highlight AI-detected insights.
- Design reports using GETPIVOTDATA for structured business intelligence outputs.

Unit 3: Report Design and AI-Based Data Modeling Techniques

- Use spinner controls for dynamic AI-assisted data interaction.
- Validate models using IF functions for conditional decision logic.
- Build structured models using IF and logical Excel functions.
- Implement the CHOOSE function for scenario-based data modeling.
- Manage multiple business scenarios using AI-enhanced forecasting logic.

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Unit 4: Tips, Tricks, and AI Productivity Enhancements

- Utilize data entry forms to streamline automated input processes.
- Create custom lists to organize and classify data intelligently.
- Convert text to speech for accessibility and reporting assistance.
- Protect data files using advanced security and AI-driven protection methods.

Unit 5: AI-Driven Data Analysis and Business Reporting Mastery Review

- Review advanced data analysis and reporting techniques using AI-enhanced Excel tools.
- Revisit structured data collection, validation, and transformation processes.
- Strengthen pivot table creation and dynamic reporting capabilities.
- Reinforce dashboard design and AI-supported business intelligence modeling.
- Review the integration of Excel with presentation and external data systems.
- Recap advanced tools, including Power Query, macros, and dynamic ranges.
- Revisit visualization and forecasting techniques for predictive insights.
- Consolidate data validation and performance optimization strategies.
- Ensure mastery of AI-enhanced Excel reporting workflows in real scenarios.

Final Insights & Key Takeaways

This course equips administrative professionals to transform Excel into a powerful AI-supported reporting and analysis tool. It strengthens decision-making capabilities by combining structured data techniques with intelligent automation and business intelligence principles.