MERCURY

Data Analysis and Business Reporting Techniques Using Excel

26 – 30 April 2027
Rome (Italy)



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Ref: 15684_320601 **Date:** 26 – 30 April 2027 **Location:** Rome (Italy) **Fees:** 6200 Euro

Introduction:

Excel is undoubtedly the right hand of professionals responsible for preparing professional reports in organizations. Organizations are flooded with vast amounts of unstructured data, and all monthly, quarterly, and annual reports heavily rely on extracting data from enterprise management systems and databases into Excel.

This Data Analysis and Business Reporting Techniques Using Excel training course will help you develop your skills in handling, integrating, and automating data and mastering techniques for processing, analyzing, and preparing reports from unstructured data. It will incorporate business intelligence data analysis and reporting techniques and use Excel to transform raw data into actionable insights.

Participants will learn to employ Excel to perform exploratory data analysis, create compelling business data analysis reports, and conduct statistical data analysis. The Data Analysis and Business Reporting Techniques Using Excel training aims to equip attendees with the skills required for automated Excel data analysis, fostering efficient and informed decision-making.

Targeted Groups:

- Professionals, analysts, researchers, and marketing and sales specialists.
- Supervisors, financial professionals, and accountants.
- All professionals and employees are responsible for administrative tasks and operations involving report preparation, data analysis, and processing.
- Anyone who sees the need for this Data Analysis and Business Reporting Techniques Using Excel course wishes to develop their skills and expertise.

Course Objectives:

At the end of this Data Analysis and Business Reporting Techniques Using Excel course, the participants will be able to:

- Demonstrate proficiency in business data analysis using Excel for report management.
- Ability to link Excel with presentation software for dynamic data updates.
- Develop business intelligence models, dashboards, scorecards, and reports to help professionals measure performance and enhance decision-making.
- Perform data analysis techniques to produce accurate and timely reports.

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Targeted Competencies:

By the end of this Data Analysis and Business Reporting Techniques Using Excel training, participants competencies will:

- Processing unstructured and disorganized data.
- Report preparation, data analysis, and alignment.
- Data modeling and business intelligence data analysis.
- Integration with external data sources and reporting using Excel.

Course Content:

Unit 1: Data Analysis Techniques and Tools:

- Collect data from multiple files and various sources.
- Validate and review data using lists, dates, and other attributes.
- Utilize row functions effectively.
- Manage cells with left, right, mid, concatenate, and value tools.
- Name cells and ranges for easy reference.
- Employ various functions: subtotal, sumif, sumifs, sumproduct, count, countif, countifs.
- Search for data, text, and values using vlookup.
- Master different table techniques and tools.
- Break down data into dates, names, weeks, week numbers, and month names.
- Convert text to columns and, trim data, and modify it using trim and len functions.
- Handle text and numbers with replace, find, and substitute functions.
- Perform text transformations and adjustments.

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Unit 2: The 19 Essential Rules for Pivot Table Mastery:

- Create pivot tables from your data sets.
- Use number formatting techniques within pivot tables.
- Design report layouts with custom styles.
- Sort data in ascending or descending order with additional options.
- Filter values and labels to refine your data.
- Expand and summarize reports as needed.
- Summarize data with sum, average, minimum, maximum, and count functions.
- Display percentages to show relative value.
- Explore pivot table options for advanced customization.
- Insert formulas within pivot tables for deeper analysis.
- Analyze data efficiently with built-in tools.
- Copy pivot tables to maintain format across reports.
- Create pivot charts to visualize data.
- Name dynamic charts for easy updates.
- Master slicer tools to filter data visually.
- Display filter pages for individual report sections.
- Link pivot tables to PowerPoint for seamless presentations.
- Apply conditional formatting to highlight key insights.
- Design reports using get pivot data for tailored output.

Unit 3: Report Design and Modeling Techniques:

- Use spinner controls to interact with data dynamically.
- Validate data modeling with the if function.
- Model data effectively with if and other logical functions.
- Implement data modeling with the choice function.
- Manage multiple scenarios within your analysis.

Unit 4: Tips and Tricks:

- Utilize data entry forms to streamline input.
- Create custom lists for personalized data organization.
- Convert text to speech for accessibility.
- Protect your data files with advanced security options.

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Unit 5: Data Analysis and Business Reporting Techniques Using Excel Course Revision and Advanced Techniques:

- Review key data analysis and business reporting techniques covered in the course.
- Revisit methods for collecting, validating, and managing data using Excel.
- Refresh knowledge on creating and formatting pivot tables.
- Reinforce skills in designing reports, dashboards, and business intelligence models.
- Review techniques for linking Excel with presentation software and external data sources.
- Recap advanced features such as macros, Power Query, and dynamic ranges.
- Revisit data visualization methods and what-if analysis for forecasting.
- Consolidate understanding of data validation and performance optimization.
- Ensure mastery of all course concepts and their application in real-world scenarios.