

# Excel for Business Analysts

GoSkills online course syllabus

Wednesday, June 19, 2024

**Skill level**

Intermediate

**Lessons**

52

**Accredited by**

CPD

**Pre-requisites**

[Excel - Basic & Advanced](#)

**Versions supported**

2021, 365

**Video duration**

5h 43m

**Estimated study time**

22h for all materials

**Instructor**

Deborah Ashby

## Introduction

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### 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

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### 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

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**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

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**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

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**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

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**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

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**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

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**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

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- 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

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- 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

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## Course Close

Course wrap up, review and goodbyes.

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