



Data Analysis & Reporting in Excel

Discover how to "tame" your data and make it work for you! Learn to synthesise and summarise information into a logical framework. Learn principles of best practice in the presenting data graphically.

Many of us struggle to make sense of all the data that is available in this information age. With such a deluge of reports and statistics which don't mean anything or can't be made sense of, it's no wonder that data is often misinterpreted or not communicated at all. This course will help you understand how to "tame" your data and make it work for you! Learn how to synthesise information into a logical framework, summarise it into a meaningful format, and then display the summary into easy-to-read tables and graphs. Covering dashboard reporting, balanced scorecards, visual design of charts and tables, we will also discuss the new charting and analysis features of Excel 2010.

Prerequisites

The course material includes extensive use of Excel and participants will gain the maximum benefit from this course if they are already competent spreadsheets users. It is designed for users who do use (or will use) Excel on a regular basis, and are comfortable with using its tools and functions.

At minimum, it is assumed that participants will know how to:

- Navigate confidently in Excel
- Create and use formulas
- Link between workbooks
- Build a basic chart



Who should attend this course?

This course is intended for anyone who needs to create reports in order to interpret and present information. It is expected that students should have had some exposure to business or finance principles.

Course Format

Public courses are run in a computer laboratory and workstations are provided so that participants can work in Excel on practical applications of content covered in the course. Course materials are written with both Excel 2007/10 and 2003 instructions. Participants can choose which version of Excel they prefer. If participants are more comfortable using their own laptops, they are most welcome to bring their own equipment. PCs are used during this course, so Apple Macintosh users may prefer to bring their own laptops.

Students are encouraged to share their own experiences with the class, and are welcome to bring examples of their own data or reports to discuss during the course.

Learning Objectives

This course is very hands-on and practical. Each participant will be expected to create their own reports, charts and models utilising the tools and techniques covered during the course.

By the end of the day, participants will:

- Understand the principles of data analysis
- Be aware of different tools available to perform their analysis
- Consider when to use a chart or a table
- Know how to use visual effects to improve their reports and presentations
- Understand the concepts of dashboard reporting and balanced scorecards
- Know how to summarise, present and communicate data clearly and concisely



Course Content

Fundamentals of Data Analysis

- Challenges in Data Analysis
- Data Relationships; One to Many, Many to One
- Mean, Median & Mode
- Common Data Analysis terminology

Data Analysis Tools

- Comparison between Excel & Access
- What's new in Office 2007 / 2010
- Shortcuts for data manipulation in Excel
- Pivot Tables

Using Excel as a Data Analysis Tool

- Essential Excel tools & functions
- Working with text
- Cleaning your data
- Creating a robust formula
- Forecasting

Charting in Excel

- Working with charts in Excel 2010
- Charting on different axis
- Bubble and Waterfall charts
- Charting with dynamic ranges

Chart and Table Design

- Tables vs. Charts/Graphs
- Visual Design; presenting data graphically
- Choosing the correct chart to display your findings
- Charting dos and don'ts



Dashboard Reporting

- Purpose and benefits of Dashboards
- Common mistakes when building a Dashboard
- Creating a Dashboard in Excel

Balanced Scorecards

- What is a Balanced Scorecard?
- Benefits and pitfalls of a Balance Scorecard

Comments from Past Students

"I will take some excellent tips away with me from today – thank you!"

"Course was well balanced with practice and theory. Presenter was very knowledgeable and topics were easy to understand."

"The content is packed but presented in a simple, informative and effective way."