

# **EXCEL DATA ANALYTICS**

**Streamline Spreadsheets and  
Revolutionize Workflow**

FOR MORE INFORMATION



[www.kaplan.com.hk/kp](http://www.kaplan.com.hk/kp)

Excel is at the heart of many businesses' data operations and many people's daily life. While it's a widely used tool, many people spend an enormous amount of time on tedious and conventional spreadsheets. If you know the **right tricks**, you could organize, automate and analyze large datasets **much more quickly**, without writing complex formulas and programming. This live online program will take the Excel functions you already know to the next level, so that you can immediately use them on the job, and be more productive and efficient.

## PROGRAM HIGHLIGHTS

- ◆ Transform lots of data to reports on Excel quickly
- ◆ Save time in consolidating and reconciling data in reporting
- ◆ Consolidate multiple files with multiple worksheets under multiple folders with small file size
- ◆ Automate processes and refresh with a single click
- ◆ Fast spreadsheet processing even with lots of data
- ◆ Absolutely no programming experience is needed
- ◆ No VBA coding or Macro recording

## PROGRAM OBJECTIVES

### Module 1

#### Mastering Management Reports with New Excel Functions

We'll start with the basics before we quickly introduce you to lesser known yet powerful Excel functions and features that help you produce financial reports and retrieve summarized data. Plus, we'll introduce some of the newest Excel functions in 2020 that can save time immediately.



**Date** | 16 May 2021 (Sunday)  
**Time** | 9:30am - 12:30pm;  
1:30pm - 5:30pm

### Module 2

#### Excel Training on Huge Data Consolidation

We'll practice data cleansing, exploring and consolidating using tools like Power Query and Power Pivot. We'll also explore practical applications of data in real-world scenarios.



**Date** | 23 & 30 May 2021 (Sunday)  
**Time** | 9:30am - 12:30pm;  
2:00pm - 5:00pm

#### LANGUAGE

Cantonese, supplemented with English materials

#### TEACHING MODE

Live online

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## YOUR LEARNING EXPERIENCE

- ◆ Learn from industry-seasoned data scientist
  - ◆ Real-world examples
  - ◆ Live online learning – follow along and ask questions as we present
  - ◆ Hands-on exercises – learn through individual work and feedback
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## WHO IS THIS PROGRAM FOR:

- ◆ Professionals who rely on Excel, including finance and accounting professionals, business leaders, sales, marketing, HR and operations who make sense of data and communicate its meaning to others
  - ◆ All levels looking for refresher
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## PREREQUISITES:

- ◆ One-year basic experience with Excel
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## HARDWARE & SOFTWARE REQUIREMENTS:

- ◆ Microsoft 365 Excel (English version)
  - ◆ Module 2 only: Activate Power Pivot on the Excel Data ribbon before class
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## CERTIFICATE

- ◆ When you finish a module with 70% attendance, you will earn a **Completion Certificate** of the module.
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## TRAINER PROFILE

Mr D Chan

Mr Chan is an experienced trainer and consultant, providing Business Intelligence and data analytics/ visualization training and solutions to enterprises in Hong Kong. Throughout this career he worked in the world's largest international retailers, where he led the BI and R&D team to serve as the bridge between massive datasets and the business, instrumented and facilitated access to high value information to support data-driven decision making. He also taught numerous courses in data science and analytics. Mr. Chan holds three master's degrees in Quantitative Analysis, Industrial Logistics Systems and Risk Management Science from the Chinese University of Hong Kong.

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| <b>FEES</b> | Early Bird Price<br>(Enroll by 25 Apr) | Regular Price |
|-------------|--|---------------|
| Module 1    | \$900                                  | \$1,300       |
| Module 2    | \$2,200                                | \$2,600       |

# TRAINING CONTENT

## Module 1

### ◆ WORKING WITH PIVOT TABLES

- Quick recap of Excel table and basic pivot table functions
- Use the less-known but useful functions: YTD, % of Total and Growth %

#### Industry Example

##### Supply Chain

How has this global conglomerate with retail, franchise and wholesale businesses been using pivot tables to consolidate and compare actual vs budget vs last year sales numbers?

### ◆ WORKING WITH CONDITIONAL FORMATTING

- Data bars
- Scaled background colors
- Metric icons

### ◆ PIVOT CHARTS

- Build pivot charts based on a pivot table

#### Demo

How to automate data transformation and consolidation with Excel without VBA coding or Macro recording?

### ◆ WORKING WITH CELL ADDRESSING

- Use absolute and relative cell addressing
- Use trace precedents and dependents for troubleshooting

### ◆ EXCEL TABLE

- Putting data into an organized table that facilitates data analytics with powerful functions

### ◆ TEXT SEARCH AND REPLACE

- Finding and replacing cell items
- Smart fill with AI capabilities

### ◆ LOOKUPS AND INDEX MATCHING

- Learn advanced lookup capabilities (**\*NEW IN 2020**)
- A replacement function for VLOOKUP (**\*NEW IN 2020**)

### ◆ SORTING, FILTERING AND DATA VALIDATION

- Recap basic sorting and data validation functions
- Advanced sorting and filtering (**\*NEW IN 2020**)
- Find and remove unnecessary duplications
- Create dynamic data validation list

### ◆ AGGREGATE FUNCTIONS WITH CONDITIONS

- Summing and averaging table values based on multiple filter conditions with powerful formulas

## Module 2

### ◆ INTRODUCTION TO POWER QUERY AND POWER PIVOT

- Ecosystem of Microsoft BI Tools (Power Query, Power Pivot and Power BI)
- Power Query for data preparation
- Power Pivot for data modeling
- Introduction to DAX formula language

### ◆ POWER QUERY WORKSHOP

#### 1. Quick practice for data cleansing

#### 2. Data cleansing

- Auto-detect data types
- Reverse rows
- Add a new calculated column and an index column
- Create a new dimension with an existing column
- Extract data with a parameter
- Create a group-by summary table
- Rename an applied step
- Change query properties
- Choose columns to keep and create a column from examples
- Merge and append queries
- Expand a structured column
- Show a full row in the bottom panel
- Duplicate vs reference a query
- Quick function menu
- Enable/disable load to report
- Transpose, pivot and unpivot data

### 3.Data Consolidation

- Combine data in multiple worksheets
- Consolidate workbooks in a folder
- Extract information from file names

### ◆ INTRODUCTION TO POWER PIVOT

Build a simple data model

Power up a Pivot Table using a data model

#### Industry Example

##### Finance

This year actual/last year actual/target sales comparison with full automation and dashboard design

##### Retail/ Wholesale

Consolidation of almost 1 million POS records with multiple master files

##### Client Data

Client contact record transformation for easy lookup and flexible column selection for reporting