

Up and Running with Excel

Course Description:

This comprehensive Excel course is designed to enhance participants' skills, starting from basic functions to advanced data analysis, visualization, and automation techniques. Each session includes practical exercises to reinforce learning. The course will cover text functions, advanced formulas, pivot tables, charts, and business intelligence tools such as PowerPivot and Power Query.

Audience Profile:

This course is ideal for business professionals, data analysts, and anyone who needs to harness the full potential of Microsoft Excel for data management, reporting, and automation.

- Duration: 8 sessions (1-1.5 hours per session)

Skills Gained:

By the end of the course, participants will be able to:

- Efficiently handle and manipulate data using Excel formulas and functions.
- Create advanced data visualizations using charts, conditional formatting, and SmartArt.
- Build and manage PivotTables for data analysis.
- Record and automate tasks using Macros.
- Utilize PowerPivot and Power Query for advanced data modeling and transformation.
- Develop dashboards and reports to support decision-making processes.

Prerequisites:

Participants should have:

- Basic understanding of Microsoft Excel (recommended but not required).
 - Familiarity with general business functions such as sales, revenue, and financial reporting will be helpful.
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Course Outline:

Day 1: Excel Essentials

Handling Text with Formulas and Built-in Tools

- Dragging the Fill Handle
- Joining Text
- Rapid Formula Copy
- Convert to Proper Case
- Converting Formulas to Values
- Breaking Apart Text

Formulas Basics

- AutoSum Techniques
- Relative vs. Absolute References in Formulas
- Defining Named Ranges
- Tables and Table Formulas

Day 2: Advanced Formulas

Advanced Formulas

- IF Formulas
 - Logical Functions (AND, OR, <>, IFS, SWITCH)
 - VLOOKUP and XLOOKUP
 - Suppressing Errors with IFERROR()
 - SUMIFS, COUNTIFS Functions
 - Date and Time Intelligence using TEXT()
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Day 3: Data Organization and Pivot Tables

Sorting and Filtering

- Preparing Data for Analysis
- Sorting Data
- Filtering Data

Pivot Tables Basics

- Creating and Updating Pivot Tables
 - Formatting Pivot Tables
 - Drill Down Functionality
 - Pivot Table Calculations
 - Filtering Rows and Fields
 - Creating Top 10 Reports
 - Using Slicers in Pivot Tables
 - Creating Pivot Charts
 - Using Slicers for Multiple Pivot Tables
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Day 4: Advanced Pivot Tables

Advanced Pivot Table Techniques

- Building Dashboards using Pivot Tables
 - Data Consolidation with Pivot Tables
 - Using Data Models to Join Multiple Tables
 - Finding Unique Items through Data Models
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Day 5: Visualizations and Automation

Charting and SmartArt

- Creating and Formatting Charts
- Adding/Removing Chart Data
- Pie Chart Techniques
- Line Charts and Trend Lines

- Forecasting with Charts
- Using Sparklines for Visual Insights
- SmartArt for Visual Representation

Enhancing Visual Impact

- Conditional Formatting with Color Scales, Icon Sets, Data Bars
 - Creating Paired Bar Charts
 - Advanced Conditional Formatting with Formulas
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Day 6: Macros and Solver

Recording Macros

- Displaying the Developer Tab
- Recording and Simplifying Macros
- Keys to Successful Macro Recording

Solver

- Understanding and Solving Models with Solver
- What-If Scenarios for Decision Making

Tips & Tricks

- Hyperlinks, Removing Duplicates, and Shrink Text
 - Transposing Data
 - Data Validation
 - Filling and Inserting Blank Rows
 - Pick From List Feature
 - Speak Cells and Printing Tricks
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Day 7: Business Intelligence Tools in Excel

Introduction to Business Intelligence

- Understanding Business Intelligence in Excel

PowerPivot

- What is PowerPivot and Why Use It?
 - Exploring the PowerPivot Interface
 - Importing Large Datasets into Excel
 - Building Models and Using DAX Functions (IF, DATE, RELATED)
 - Creating Dashboards with PowerPivot (Actual vs. Budget)
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Day 8: Power Query (Data Import)

Power Query

- Importing Data from Various Sources
- Cleaning and Transforming Data
- Pivoting and Unpivoting Data
- Merging and Appending Queries for Consolidation