



Advanced Excel Course Outline (15.5Hrs)

Session 1: (1.5Hr)

An overview of the screen, navigation, and basic spreadsheet concepts

- Customizing the Ribbon, Worksheets, Format Cells
- Data Entry, Simple Calculation and Hidden Features
- Dates, Auto Fill, Flash Fill, Custom List, Comments, Formula Cells
- Data validation, Screen Tip

Session 2: (1Hr)

Worksheet Navigation & Copying and Protecting

- Useful Excel Shortcuts for Navigation, Copying, Moving & Hiding Worksheets, Freeze Panes and Split Screen for Long Reports, Hide & Unhide,
- Insert & Adjust Columns and Rows, Copying & Pasting Data, Protecting Worksheets & Specific Ranges

Session 3: (1Hr)

Excel Formulas

- Calculation, Simple Formulas, Rule, Referencing (Absolute and Relative)
- Range Names, Circular Ref, Combined Cells

Session 4,5&6: (3.5Hrs)

Important Excel Functions

- Database Functions (DSUM, DCOUNT, DAVERAGE, DMIN, DMAX, etc.)
- Date and Time Functions (DATE, DATEDIF, DAY, EOMONTH, NETWORK DAYS, NETWORKDAYS. INTL, etc.)
- Financial Functions (FV, PMT, NPV, PV, IRR, etc.)
- Logical Functions (AND, OR, NOT, IF, IFERROR, IFNA, XOR, etc.)
- Lookup and reference functions (VLOOKUP, HLOOKUP, CHOOSE, INDEX, MATCH, INDIRECT, COLUMN, ROWS, etc...)
- Statistical Functions (LARGE, SMALL, COUNT, COUNTA, COUNTBLANK, COUNTIF, COUNTIFS, AVERAGE IF, etc.)
- Text Functions (CONCATENATE, FIND, SEARCH, LEN, LOWER, UPPER, MID, TEXT, TEXTJOIN, SUBSTITUE, etc.)
- Maths and Trigonometry (SUM, SUMIF, SUMIFS, SUMPRODUCT etc.)

Session 7: (1Hr)

Data Cleaning and Management

- Sort, Unsort, Subtotal, Filter, Remove Blank, Fill Empty.
- Remove Duplicates, Find, Replace, Tables.

Session 8: (45 Mins)

Formatting incl. Conditional and Number Formatting

- Formatting Tips – Alignments, Border and More
- Justify Text Length
- Number Formatting Options (& Special Formatting)
- Conditional Formatting - Top Bottom, Icons, Data Bars & More

Session 9: (45 Mins)

Printing Files & Saving as PDF

- Useful Printing Options, Adding Page Breaks & Printing Part of a sheet
- Printing Large Datasets, Header & Footer (Logo, Page Numbers..)

Session 10: (1Hr)

Working with Charts

- Chart Basics for a Quick Start, Adding More Series for Comparison Charts & Other Alternatives,
- Combination Charts - Different Series Types in One Graph, Dynamic Chart Ranges with Excel Tables,
- Pareto & Histogram Charts, Tree map Chart, Sunburst, Pie & Doughnut Charts, Sparklines - Mini Charts Inside Cells

Session 11: (1Hr)

Pivot Tables

- Raw Data for Pivot Table, Raw Data Table for Pivot Table, Adding Calculations & Multiple Reports with Pivot Tables
- Using Pivot Slicers & Timelines (Working with Dates), Creating Pivot Charts

Session 12: (1.5Hr)

Power Pivot and Power View

- KPI Hierarchies DRILL UP / DRILL DOWN
- Create Power View Sheets

Session 13: (1Hr)

What-If Analysis

- Goal Seek, Solver, Data Table, Scenarios, Good

Session 14: (1.5Hr)

Power Query

- Import Text File with Power Query, Merging Report, Cleaning Messy Data
- Merging Files, Folders

Dashboard Course Outline (8.5Hrs)

Dashboard Source Data & Formats

- Source Data
- Source: Excel Spreadsheet
- Source: Microsoft Access
- Source: Text / Data / CSV File

Excel Dashboard Formulas (3.5Hrs)

- Excel Formulas You'll Need for Impressive Dashboards
- Index Match for Complex Lookups - Basics
- Index Match for Complex Lookups - Advanced
- Index for Dynamic Drop-down List Selection
- Index for Dependent Drop-down Lists in Excel
- SUMIFS, COUNTIFS, AVERAGEIFS to Handle Multiple Criteria
- LARGE and SMALL for Sorting Excel Data
- ROW(S), COLUMN(S) for Indexing
- ROW as Unique Identifier for Lookups
- CHOOSE for Flexibility
- Excel Text Function for Formatting
- Excel N Function for Tracking
- GetPivotData: Extract data Efficiently from Pivot Tables
- INDIRECT for Flexible References in Excel
- Choose & Excel Name Manager for Flexible Ranges (Alternative to Indirect)

Form Controls for Interactive Excel Dashboards(1.5Hrs)

- Introduction to Form Controls - Active X vs. Form Controls
- Combo Box - Select from a Drop-Down List in Excel
- Check Box - Check / Uncheck Option in Excel
- Spin Button - Move Up & Down Lists in Excel
- Option Button - Choose One Option Only
- List Box - Select from a List of Options in Excel
- Scroll Bar - Scroll Through Excel Graphs & Tables
- Dependent Combo Boxes (2nd list automatically resets)

Advanced Excel Chart Techniques(1.5Hrs)

- Chart Overview & When to Use Which Graph
- Excel Chart Basics to Advanced
- Add Total Values to Stacked Excel Column Charts
- Add Dynamic Series Labels Inside Excel Charts
- Excel Chart Secret: Error Bars for Additional Control
- Pro Excel Chart Technique: Changing Chart Ranges
- Infographics in Excel: Non-standard but Impressive Bar Chart
- Dynamic Excel Map Chart with Drop-down

Dashboard - Advanced Excel Pivot Table Techniques (1.5Hr)

- Variances in Excel Pivot Tables
- Conditional Formatting in Excel Pivot Tables
- Pivot Table as Part of Excel Dashboard Report
- Pivot Charts in Excel Dashboards
- Automatically Refresh Pivot Table with Simple VBA code

Dashboard - Impressive Charts Using Shapes(30Mins)

- Info Charts: Adding Shapes to (Pivot) Charts
- Info Charts: Overcoming Pivot Chart Limitations in Excel

Dashboard Complete - Final Touches