

“Excel Power Techniques: Automation, Dashboards & Lookups”)

Excel Training – 8 Hour Course TOC

 Total Duration: 8 Hours | Delivery: Hands-On + Demo + Practice Activities

Module 1: Data Validation & Drop-Down Controls (1 Hour)

Topics Covered:

- What is Data Validation & its practical use
- Setting Validation Criteria (text, numbers, dates, custom formulas)
- Creating Dynamic Drop-down Lists
- Preventing invalid inputs with messages & alerts

Activity:

✓ Create a form that uses drop-downs and data entry restrictions for clean inputs

Module 2: Mastering Dates and Time Calculations (1 Hour)

Topics Covered:

- Formatting date/time values for reports
- Calculating days between two dates
- Using NETWORKDAYS and WORKDAY for workday math
- Offsetting dates with only business days

Activity:

✓ Create a task timeline sheet that auto-calculates start/end dates skipping weekends

Module 3: Using Conditional & Database Functions (1 Hour)

Topics Covered:

- Overview of conditional formulas like IF, SUMIFS, COUNTIFS
- Setup required for database functions (DSUM, DCOUNT)
- Performing calculations with multiple criteria

Activity:

✓ Build a mini report that filters and calculates results using criteria-based formulas

Module 4: Lookup & Reference Functions Deep Dive (1.5 Hours)

Topics Covered:

- Basics of lookup formulas: VLOOKUP, HLOOKUP, XLOOKUP
- Exact vs Approximate match logic
- Error-handling with IFERROR
- Practical lookup situations and nested functions

Activity:

✓ Build a price-checking tool and product search using dynamic lookup combinations

Module 5: Dashboards with Power Query & Power Pivot (2 Hours)

Topics Covered:

- Intro to Power Query: loading, cleaning, and combining data
- Power Pivot: creating relationships and data models
- Summarizing data via PivotTables from Power Query/Pivot output
- Adding visuals: Charts, Slicers, Conditional Formatting
- Building an Interactive Dashboard

Activity:

✓ Create a KPI dashboard from raw sales data with slicers and interactivity

Module 6: Automating with Macros (1.5 Hours)

Topics Covered:

- Enabling and saving files with Macros
- Recording Macros for repetitive tasks
- Assigning buttons to run Macros
- Basic introduction to VBA and editing recorded code

Activity:

✓ Record a macro for formatting reports, assign it to a button, and explore the VBA editor

End of Course Add-ons:

- **Practice File Set + Sample Dashboard Template**
- **Certificate of Completion Template**