KOENIG SOLUTIONS · COURSE OUTLINE

Advance Excel with Macros and Dashboard - Customised for Yotta

Learn to organise data, build advanced formulas, dashboards and macros to analyse and present information in Excel.

3 Days	11	74
DURATION	MODULES	TOPICS

COURSE OVERVIEW

This course covers the Excel interface, ribbon and formatting shortcuts before moving into organising data with tables and new spreadsheet functions. It then explores formulas and functions including named ranges, criteria-based calculations, IF and lookup functions, text and date functions, what-if analysis, sorting and filtering, and working with lists and tables. Later modules address advanced formatting, conditional formatting, PivotTables, Pivot Charts and advanced charts, followed by building Excel dashboards using sparklines, dynamic ranges, buttons, scroll bars and slicers. The course concludes with recording, naming, editing and securing simple macros.

WHO THIS COURSE IS FOR

Data Analysts | **Financial Analysts** | **Business Analysts** | **Excel Users** | **Report Developers**

LEARNING OBJECTIVES

- Explain the Excel user interface, ribbon and contextual tabs
- Apply lookup functions such as VLOOKUP, XLOOKUP and INDEX
- Perform what-if analysis using Scenarios, Goal Seek and Data Tables
- Sort and filter data using multiple levels and advanced criteria
- Manage lists and tables including subtotals and duplicate removal
- Apply conditional formatting and custom styles to worksheets
- Build PivotTables, Pivot Charts and advanced charts
- Develop Excel dashboards and record simple macros

COURSE SYLLABUS

11 Modules, 74 Topics

01

Exploring the Excel Environment

TOPICS

Explore the User Interface · Work with the Ribbon · Work with Contextual Tabs · Paste Special Preview · Use the Excel built in themes · Customize the Excel Interface · Working with Different Formatting Shortcuts

02

Organizing Data with Excel

TOPICS

- Explore the Enhancements in Excel Spreadsheets
- Insert Tables
- Format Tables
- New functions added in Excel 2016

03

Working with Functions

TOPICS

- Using Named Ranges in Formulas
- Using Formulas That Span Multiple Worksheets
- Entering a Formula Using Data in Multiple Worksheets
- Using criteria based calculations like COUNTIF(), COUNTIFS(), SUMIF(), SUMIFS()
- Using the IF Function
- Using the AND, OR, Nested IF() and IFS()
- Using the XLOOKUP Function
- Using the VLOOKUP Function
- Using the HLOOKUP Function
- Working with other Lookup Functions like INDEX(), MATCH(), INDIRECT()
- Using the CONCAT Function
- Using the TRANSPOSE Function
- Using the PROPER, UPPER, and LOWER Functions
- Using the LEFT, RIGHT, and MID Functions

Working with Functions (continued)

TOPICS (CONTINUED)

- Using the LEFT and RIGHT Functions
- Using Date Functions
- Using the YEAR, MONTH, and DAY Functions

04

Working with What If Analysis

TOPICS

Creating and Understanding Scenario · Working with Goal seek · Working with Data Table

05

Sorting and Filtering Data

TOPICS

- Sorting and filtering lists
- Sorting Data according to color
- Using multiple level sorting i.e sorting data more than 3 columns
- Custom Sort (as per user defined sequence requirement)
- Using advanced filter options
- Limitations using Auto Filter and working with Advanced Criteria using Advance Filter
- Improvement in Filtering Data capability in a Spreadsheet

06

Working with Lists

TOPICS

Converting a List to a Table · Removing Duplicates from a List · Sorting Data in a List · Filtering Data in a List · Adding Subtotals to a List

07

Working with Tablets

TOPICS

Format Data as a Table · Move between Tables and Ranges · Modify Tables · Define Titles · Creating and Modifying a Table in Excel

08

Advance Formatting

TOPICS

Applying Conditional Formatting · Using Conditional Formatting · Working with Styles · Creating and Modifying Templates

09

Manage Advanced Charts and Tables

TOPICS

Create and modify advanced charts · Create and modify PivotTables · Create and modify Pivot Charts

10

Excel Dashboard

TOPICS

- Sparkline
- Top & Bottom Ranking
- Bullet Graphs
- Dynamic Data Range
- Dynamic Labels
- Step Charts
- Dynamic Data Validation list
- Buttons
- Scroll Bar
- INDIRECT Function
- Dynamic Named Range with OFFSET
- Rollover Technique
- Scroll and Sort Table
- Capture Slicer Selection in Formula
- GETPIVOTDATA function

11

Create and Modify Simple Macros

TOPICS

record simple macros · name simple macros · edit simple macros · Macro Security

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training | Live Online Classes (ILO) | Fly-Me-A-Trainer (FMAT) | Flexi (Self-Paced) | 1-on-1 Training

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Talk to a learning advisor about schedules, group training and customised delivery.

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