

KOENIG SOLUTIONS • COURSE OUTLINE

Microsoft Excel Customized for UFlex

Learn to format, analyse and present Excel data using formulas, lookups, pivot tables and charts.

1 Day

8 HOURS A DAY

2

MODULES

23

TOPICS

COURSE OVERVIEW

This course covers Excel's core features, including data formatting, conditional formatting, filters, sorting and formula writing across financial, logical, text and statistical functions. It proceeds through If-Then-Else and nested If commands, Vlookup and Hlookup, charts, data linking, grouping and pivot tables. The course then addresses intermediate formula work, including arithmetic operations, paste special options and summarizing functions, before moving into advanced functions such as nested IFs, logical functions and lookup alternatives using INDEX.

WHO THIS COURSE IS FOR

Excel Users

Data Analysts

Finance Professionals

Report Preparers

Administrative Staff

LEARNING OBJECTIVES

- Apply data formatting and custom settings to clean data
- Use conditional formatting to highlight value changes
- Sort and filter data to a desired level of detail
- Write formulas across financial, logical and statistical categories
- Apply If-Then-Else and nested If commands for conditional results
- Use Vlookup and Hlookup to merge data from different sources
- Create and modify charts such as column, line and pie
- Build pivot tables to summarize and report on data

2 Modules, 23 Topics

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Program Details

TOPICS

- **Excel Quick Overview:** Use of Excel, its boundaries & features
- **Data Formatting & Custom settings:** Number, Text, Date, Currency, Custom settings. Data formatting & cleaning
- **Conditional Formatting:** Once defined, it will automatically change color of value. E.g. up or down, high or low, pass or fail, profit or loss etc.
- **Filters, Queries & Data Sorting:** Drill down your data to your desired level. Sort data based on your choice e.g. like North, East, West, South rather than alphabetically.
- **Formula Writing & Fixing Errors:** Financial, Logical, Text, Day and Time, Statistical, Mathematical etc. Sum, Average, Count, Minimum, Maximum, Absolute, Concatenate, Count A, Count Blank, Count If, Day, Today, Even, Exact, Exp, Find, Int, IsBlank, Left, Len, Lower, Upper, Proper, Now, Power, Rank, Right, Round, Trim etc.
- **If-Then-Else & Nested If commands:** Produce different set of results based on slabs, conditions
- **Vlookup / Hlookup:** You have large amount of data placed at different locations & you want to merge it based on common values & it's relevance
- **Graphs & Charts:** In this workshop you will learn how to create, modify & update graphs / charts like Column, Line, Pie, Bar, Area, Scatter, 3D etc.
- **Hyper / Data Linking:** Hyper & data linking, within or outside Worksheet / Excel File is an important feature. This helps update data automatically.
- **Grouping - Ungrouping:** Sometime data needs to be grouped for summarized results & crisp view. Grouping & ungrouping feature will help you do so.
- **Pivot Tables:** Summarize your data as per your desire. You need to select data in a range & produce consolidated results in user defined reporting formats.

Intermediate Excel

FORMULAE & WORKING WITH FUNCTIONS

- Formulae that add/subtract/multiply/divide
- Bodmas/formula error checking
- The sum function
- Summing non-contiguous ranges, count/average/maximum/minimum functions
- Paste special to copy formulae/formats/validations
- Paste special to add/multiple & transpose
- Shortcut to copying visible cells

WORKING WITH ADVANCE FUNCTIONS

- Writing conditional expressions (using IF)
- Using nested IFs
- Using logical functions (AND, OR & NOT)
- Using lookup and reference functions (VLOOKUP & HLOOKUP)
- Limitation of Vlookup and how to avoid it by using INDEX & INDEX

WHAT IS INCLUDED

Everything You Need to Succeed

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

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