

KOENIG SOLUTIONS · COURSE OUTLINE

Customised Basic to Advanced Excel (Microsoft)

Learn to use Excel from interface basics and formulas to Power Query, Pivot Tables and macros.

3 Days

24 HOURS

18

MODULES

82

TOPICS

COURSE OVERVIEW

This course covers the Excel interface, ribbon and Quick Access Toolbar before moving into formulas, cell references, data entry and formatting. It then addresses worksheet management, general and conditional functions, date and time functions, tables, lookup functions, sorting, filtering, data validation, and conditional formatting. Further topics include working with data through subtotals and Goal Seek, Power Query, Pivot Tables and reports, interactive dashboards, macros and automation, and Power Pivot with the Data Model and DAX functions.

WHO THIS COURSE IS FOR

Excel Users

Data Analysts

Business Analysts

Report Developers

Finance Professionals

Administrative Staff

LEARNING OBJECTIVES

- Explain the Excel interface, ribbon and Quick Access Toolbar
- Apply formulas using relative, absolute and mixed references
- Format worksheets and manage cells, rows, columns and sheets
- Apply general, text, logical and date functions such as IF and VLOOKUP
- Create and format tables, and apply conditional formatting
- Sort, filter and validate data using advanced options
- Build Pivot Tables, Pivot Charts and interactive dashboards
- Develop macros and Power Pivot models using DAX functions

18 Modules, 82 Topics

01

Excel Interface and Essentials

TOPICS

Exploring the User Interface · Working with the Ribbon and Contextual Tabs · Understanding of Groups & Commands

02

The Quick Access Toolbar

TOPICS

- Adding common Commands
- Adding Additional Commands with Customise Dialogue Box
- Adding Ribbon Commands or Groups
- Placement
- Customize the Quick Access Toolbar

03

Using Formulas in Microsoft Excel

TOPICS

Math Operators and the Order of Operations · Entering Formulas · Using Formulas and Functions

04

Working with Cell References

TOPICS

- Understanding Cell References
- Using Relative, Absolute, and Mixed References
- Practical Examples with Mixed References and Formulas

05

Data Entry and Formatting

TOPICS

Working with Font Group · Working with Alignment Group · Working with Number Group

06

Working with Worksheet

TOPICS

- Inserting cells, rows, columns and sheets
- Deleting cells, rows, columns and sheets
- Hiding/ Unhiding cells, rows, columns and sheets
- Renaming, moving or copying worksheet
- Adjusting row height/ column width
- Protecting Worksheets and Workbooks
- Password Protecting a Workbook
- Password Protecting a Worksheet
- Password Protecting Ranges in a Worksheet

07

Working with Some General Functions and Conditional Functions

TOPICS

- Work with SUM, AVERAGE, MIN, MAX, COUNT, LARGE, SMALL, REPT & RANK functions
- **Text Functions:** UPPER, LOWER, PROPER, TRIM, CONCAT, TEXTJOIN
- **Logical Functions:** Writing Conditional Expressions (IF, AND, OR)
- Limitation of IF Statements - Using IF with AND OR Function
- Using the Nested IF Function
- Using the IF Function with Date

08

Date and Time Functions

TOPICS

WORKDAY and NETWORKDAYS · TODAY and NOW Functions · Using DATE Function · Using YEAR, MONTH and DAY Function

09

Working with Tables and Formatting

TOPICS

Introduction to Tables in Excel · Creating and Formatting Tables · Applying styles in Table

10

Working with Lookup Functions & Some Advanced Functions

TOPICS

- Using VLOOKUP and HLOOKUP
- Using INDEX and MATCH Functions
- Using COLUMN Function with VLOOKUP
- Using MATCH with VLOOKUP Function
- XLOOKUP Function
- Filter Function
- Using SUMIF, SUMIFS, AVERAGEIF, AVERAGEIFS, COUNTIF, COUNTIFS, & IFERROR functions

11

Sorting, Filtering, and Data Validation

TOPICS

- Sorting and Filtering Data (Single and Multi-Level Sorting)
- Custom Sorting Techniques
- Applying Filter on Data
- Using Advanced Filter Options
- Applying Data Validation
- Specifying Valid Ranges and Lists for Cells (Data Validation)

12

Working with Conditional Formatting

TOPICS

- Conditional Formatting Basics
- Applying Rules and Managing Conditional Formatting
- Using Data Bars, Color Scales, and Icon Sets

13

Working with Data

TOPICS

Creating Subtotals (Single and Multi-Level) · Consolidating Data from Multiple Ranges · Using Goal Seek

14

Introduction to Power Query

TOPICS

Overview of Power Query · Data Transformation Techniques in Power Query · Merge & Append Data

15

Pivot Tables and Reports

TOPICS

- Creating, Formatting, and Customizing Pivot Tables
- Using Group Features in Pivot Tables
- Creating Pivot Charts
- Using Slicer and Timeline Options

16

Creating Interactive Dashboards

TOPICS

- Designing Interactive Dashboards Using Pivot Tables and Charts
- Adding interactive elements
- Creating Relationships Between Slicers, Pivot Tables, and Charts
- Adding Timelines and Filters
- Applying Themes and Designing Professional Dashboard Layouts

17

Macros and Automation

TOPICS

Recording and Editing Macros · Assigning Macros to Shapes and Buttons · Adding Macros to the Quick Access Toolbar · Saving Files with Macros

18

Power Pivot

TOPICS

- Introduction to PowerPivot
- Normal Pivot Vs. PowerPivot
- Meet Excel's "Data Model"
- The Data Model Data vs. Diagram View
- Creating Table Relationships in Excel's Data Model
- Calculated columns & calculated Measures
- Using Basic DAX Functions
- Creating dashboards with Power Pivot & Power Query

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)

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