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ADVANCED MICROSOFT EXCEL TRAINING

Class Content

Abstract

This Advanced Excel Training is delivered onsite to intermediate Microsoft Excel utilizing finance and business data extracted from finance applications to generate reports, automate tasks, create charts and visualizations among other corporate data insights.

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Advanced Excel Master Class

Overview

The course shows how to analyze and review data extracted from accounting systems and databases in order to prepare management reports and build efficient financial models.

The course studies Excel's functions and how to use these effectively. The program also shows how to access the Visual Basic Editor and use macros and user defined functions in order to enhance Excel's functionality. Half a day will also be spent showing attendees how to use Excel's pivot table functionality. Pivot tables are often poorly understood and yet are the most powerful feature in Excel. A basic pivot table will allow you to summarize 50,000 rows of data in 30 seconds

The course is highly practical: delegates will be exposed to examples (in Microsoft Excel) throughout the 2 days. Note that this course aims to cover a very wide field in a relatively short time and will thus provide more of an overview (with examples) than an in-depth, highly technical course.

Methodology

The course is highly interactive, and formal lecture content is kept to a minimum. Spreadsheet techniques are explained and demonstrated by using extensive case studies, adhering closely to real life examples. Throughout the program emphasis is laid on the importance of reality-checking and the dangers of spreadsheet blindness, on a fundamental understanding of key issues and on the skills of communicating conclusions from spreadsheet techniques to colleagues and partners. Delegates will be expected to be highly participative and motivated to learn, and to express their needs and priorities clearly.

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Time Table & Course Content

Module I – Named Ranges, Data Validation and Model Sensitivity

- **What is new in Excel 2013 and 2016**
- **Building Flexible Formulas in Excel**
 - a) Relative vs. Absolute referencing
 - b) Using names to increase formula efficiency
 - c) Creating cell and range names
 - d) Applying and redefining names
 - e) Naming conventions
- **Working with Lists and Filling Ranges**
 - a) Series – Linear, Date, Growth
 - b) Flash Fill
- **Data Validation**
 - a) Validating Lists
 - b) Validating Dates
 - c) Validating Text Length
- **Sensitivities**
 - a) What If Analysis – Goal Seek
 - b) Sensitivity analysis using Scenario Manager
 - c) Sensitivity Analysis and Scenarios
 - d) Scenario Summary Reports
- **Key Techniques for improved reporting**
 - a) Structure and report Layouts
 - b) Design rules for a good layout
 - c) Key Board Techniques and Shortcuts
 - d) Pointing Techniques

Module II – Pivot Tables and Pivot Charts

- **Pivot Tables and Pivot Charts**
 - a) Preparing Your Data
 - b) Inserting a Pivot Table
 - c) Inserting Pivot Charts
 - d) More Pivot Table Functionality
 - e) Inserting Pivot Charts
 - f) Working Slicers and Timeline
 - g) Drilling Data
 - h) Exercise: Working with Pivot Tables
- Working with Calculated Fields
 - a) Summarizing Data inside Pivot Tables
 - b) Performing Calculations outside PivotTables
- Grouping Data
 - a) Sub Total
 - b) Grouping by Rows
 - c) Grouping by Columns
- Filters and Advanced Filter
 - a) Filtering Data (Dates and Numerical Values)
 - b) Filtering Data with Complex Criteria
 - c) Filtering Data in place
 - d) Copying Filtered Data to another location
 - e) Exercise: Filtering Data with Complex Criteria
- Introduction to Power Query for Excel 2013 & Power Query 2016
 - a) Installing and activating Power Query for Excel 2013
 - b) Power Query use-case: Merging Data from Multiple sheets/Work Book

Module III – Formulas and Functions

- **Formulas & Functions**
 - a) Decision Functions – LOGICAL Functions
 - b) Formulas for manipulating text – TEXT Functions

- c) Formulas for Summarizing Data – MATCH Functions
- d) Formulas for Data Lookups – LOOKUP Functions
- e) Formulas for calculating time – Date & Time Functions
- f) Functions for Calculating Time Value for Money – Finance Functions
- g) Commonly used functions
- h) How to use the OCL Function Dictionary
- Creating triggers, reminders and conditions
 - Conditional Formatting
 - Utilizing Excel rare fonts to create triggers

Module IV – Macros

- Recording and Using Macros
 - a) Recording Macros
 - b) Copy a Macro from Workbook to Workbook
 - c) Exercise: Recording a Macro
 - d) Running Macros
 - e) Editing Macros
 - f) Adding Macros to the Quick Access Toolbar
 - g) Managing Macro Security
 - h) Exercise: Adding a Macro to the Quick Access Toolbar, using form buttons and the Office Tab

Module V – Charts and Visualization

- Preparing chart data
- Choosing appropriate chart
- Charts best practices
- Exporting your charts to Word and PowerPoint
- Charts and Visualization
 - a) Charting for different scales
 - b) Charting for Trends
 - c) Charting Missing Data
 - d) Charting for Forecast Data
- Dynamics Charts (Dashboards)
 - a) Chartless Visualization
- Working external chart data
- Formula Driven Charts

Module VI – Finance Functions, Working with External Data

- **Finance Functions**
 - Time Value for Money – The PMT Function
 - Creating Loan Amortization Tables
 - Using Solver to Model Loans, Cash Flows and Break-Even Points
 - Functions related to PMT (IPMT, R, NPER, FV ad PV)
- **Working External Data**
 - Linking Workbooks
 - Working with non-legacy databases
 - Extracting Data from the Web
 - Creating Collector Models
- **Data Tools**
 - Converting Text to Columns
 - Consolidating Data
 - Consolidating Multiple Workbooks – Power Query for Excel
 - Business Modeling - Solver for Excel
- **Power BI**
 - Installing Power BI
 - Power BI for Android
 - Power BI Use Case: Linking Power BI to Excel Data

What You G

- Training Materials on DVD
- Certificate of Attendance
- Free Post-Training Support
- Inclusion on our weekly Microsoft Excel pro-tips mailing list