



14 November 2016

## *Advance MS Excel Training Plan*

## 1. Introduction:

**ExcelTrotters** is a consulting firm based in Nairobi but offering its services across the region. For this training, we aim at equipping professionals with advanced relevant skill in the usage of Microsoft Excel for data management, analysis and presentation. This training is applicable to anyone in the organization who uses MS Excel.

### Why Train with us?

- We have very skilled presenters
- Our course is based on real life data and examples
- We have a very detailed training manual
- Well researched training materials
- Our training is cost effective
- Very conducive training environment – 5-star hotel for off-site trainings

### Training Benefits

- Increased productivity – the staff can do more
- Less time spent working on Excel
- Good understanding Excel tricks
- High level of accuracy while using Excel
- Good data analysis skills
- A new level in management business reporting

The advanced training is done in two level –

1. Advanced training (5 days) – outline shown below
2. Advanced MS Excel for data analysis (Business Intelligence Reporting based on Microsoft power BI) – Outline attached. The second level training should only be done after level one.

## 2. Course details – *Highlights*

### Advanced -

- Introduction to excel
  - Copying, Moving & Deleting
  - Selection Techniques
  - Ribbon Customization
  - Data validation
  - Useful shortcuts
- Formatting
  - Alignment Formatting
  - Number Formatting
  - Data split through Flashfill
  - Text into columns
- Conditional Formatting
  - Use & design
  - Reporting
  - Formulas
- Tables
  - Formula Nomenclature - structured/ Unstructured references
  - Table design
  - Advantages of Tables
- Pivot Tables
  - Creation & design
  - Data Source Management
  - Data Grouping - ranges
  - Cloning
  - Dynamic Ranges
  - Pivot Formatting
  - Reporting – count, %, unique values etc.
  - Calculated fields etc.
- Charts
  - Chart Types
  - Resizing a chart
  - Deleting a chart
  - Chart title or labels
  - Chart background color
- Advanced Formulas for data analysis
- Functions & Formulas
  - Creating formulas
  - Easy way to create formulas
  - Copying formulas
  - Operators
  - Formula error messages
- Working with Dates & Time
  - Addition
  - Subtraction
- Dashboards
- Slicers
- Data Analysis
  - Goal Seek

### 3. Training Schedule – 5 days

TIME	ACTIVITY	DETAILS – <i>Highlights Only</i>
<b>DAY 1 –</b>		
08:00 to 08:30am	Arrival and Registration	
08:30 to 10:00am	Introduction to Excel Basics	<ul style="list-style-type: none"> <li>• Excel Ribbon</li> <li>• Creating Shortcuts</li> <li>• Workbook/Worksheet mgt</li> </ul>
<b>5 Minutes Body Break</b>		
10:05am to 11:00am	Data Management	<ul style="list-style-type: none"> <li>• Filtering – various data types</li> <li>• Sorting -various data types</li> <li>• Data Split – text to column</li> <li>• Data Joining - formulas</li> <li>• Flash Fills</li> </ul>
<b>20 Minutes Tea Break</b>		
11:20am to 01:00pm	Data Management	<ul style="list-style-type: none"> <li>• TEXT function usage</li> </ul>
<b>Lunch Break</b>		
02:00pm to 03:00pm	Data Formatting	<ul style="list-style-type: none"> <li>• Data Transposing</li> <li>• Data Realignment</li> <li>• Data conversion using formulas</li> </ul>
<b>15 Minutes Tea Break</b>		
03:15pm to 04:30pm	Q&A	The delegates get to engage the facilitator
<b>DAY 2 –</b>		
08:00am to 10:00am	Advanced Formulas	
<b>5 Minutes Body Break</b>		
10:05am to 11:00am	Advanced Formulas	
<b>20 Minutes Tea Break</b>		
11:20am to 01:00pm	Formula Cell referencing	<ul style="list-style-type: none"> <li>• Absolute</li> <li>• Relative</li> <li>• Mixed</li> </ul>
<b>Lunch Break</b>		
02:00pm to 03:00pm	Working with Dates in Excel	<ul style="list-style-type: none"> <li>• Date &amp; time function</li> <li>• Date formatting</li> </ul>
<b>15 Minutes Tea Break</b>		
03:15pm to 04:30pm	Q&A	The delegates get to engage the facilitator
<b>DAY 3 –</b>		

08:00am to 10:00am	Conditional Formatting	<ul style="list-style-type: none"> <li>Introduction &amp; System driven formatting</li> </ul>
<b>5 Minutes Body Break</b>		
10:05am to 11:00am	Conditional Formatting	<ul style="list-style-type: none"> <li>Formulas driven</li> </ul>
<b>20 Minutes Tea Break</b>		
11:20am to 01:00pm	Conditional Formatting	<ul style="list-style-type: none"> <li>Mixed formatting</li> </ul>
<b>Lunch Break</b>		
02:00pm to 03:00pm	Tables	<ul style="list-style-type: none"> <li>Use and design</li> <li>Formula nomenclature</li> </ul>
<b>15 Minutes Tea Break</b>		
03:15pm to 04:30pm	Q&A	The delegates get to engage the facilitator
<b>DAY 4 –</b>		
08:00am to 10:00am	Pivot Tables	<ul style="list-style-type: none"> <li>Introduction</li> <li>Designs</li> <li>Building pivot tables</li> </ul>
<b>5 Minutes Body Break</b>		
10:05am to 11:00am	Pivot Tables	<ul style="list-style-type: none"> <li>Calculated columns</li> </ul>
<b>20 Minutes Tea Break</b>		
11:20am to 01:00pm	Pivot Tables	<ul style="list-style-type: none"> <li>Data Analysis</li> </ul>
<b>Lunch Break</b>		
02:00pm to 03:00pm	Charting	<ul style="list-style-type: none"> <li>Building and customizing charts</li> </ul>
<b>15 Minutes Tea Break</b>		
03:15pm to 04:30pm	Q&A	The delegates get to engage the facilitator
<b>DAY 5 –</b>		
08:00am to 10:00am	PowerPivot	<ul style="list-style-type: none"> <li>Introduction &amp; Setup</li> </ul>
<b>5 Minutes Body Break</b>		
10:05am to 11:00am	PowerPivot	<ul style="list-style-type: none"> <li>Data modelling</li> </ul>
<b>20 Minutes Tea Break</b>		
11:20am to 01:00pm	PowerPivot	<ul style="list-style-type: none"> <li>Data Analysis</li> </ul>
<b>Lunch Break</b>		

02:00pm to 03:00pm	PowerPivot	• Data Analysis
<b>15 Minutes Tea Break</b>		
03:15pm to 04:30pm	Q&A	The delegates get to engage the facilitator

#### 4. Training Requirements

- Microsoft Excel 2016 Professional Pro
- Windows based Laptop – Minimum RAM (2GB)
- Minimum 1GHz clock speed
- Internet connection
- Screen Resolution 1280x800

#### 5. Training Methodology

- Every delegate will be required to have a laptop with Microsoft 2016 professional pro (Activated) installed. There are some training aspects not available in Excel 2010 and the lower versions.
- The training is practical and everyone shall be expected to practically participate.
- Soft and hard copy training materials shall be provided.

#### 6. Certificates

Delegates who participates to the end of the training shall be issued with attendance certificate

#### 7. Cost

The training costs \$1,095.00 per attending delegate. For in-house training, there should be a minimum of 4 delegates. This cost caters for training and training materials only (hard and soft copies). Travel and accommodation charges are on the clients' account.

## 8. Clients list

Some of our clients



A Previous training session