

Excel in Corporate World with Microsoft Excel

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Topics to be Covered

Course Type: Basic to Advanced Excel		Duration: 3 Weeks / ~12 Hours
Overview: Getting Started with Excel	-	02 hours
Formatting Essentials	-	02 hours
Functions & Formulas	- 4165	05 hours
Data Analysis Tools	anally ahai	01 hour
> Excel Charts		0.5 hour
➤ Pivot Table	01-	0.5 hour
> Bonus Module	-	0.5 hour



Getting Started with Excel



- ✓ Introduction to Excel 2013/2016/2019/Office 365
- ✓ Application Interface and Key Components of Excel
 - ☐ Ribbon Bar, Quick Excel Toolbar, Formulas Bar, Name Box, Rows, Columns, Status Bar etc.
- ✓ Navigating Through Excel Ribbon Tabs
 - ☐ Exploring Each Ribbon Tab i.e. Home, Insert, Page Layout, View etc.*
- ✓ Exploring Important Excel Options*
 - ☐ Changing Cursor Direction
 - ☐ Enable/Disable Fill Handler and Live Preview
 - ☐ Hiding Horizontal/Vertical scroll bars
 - ☐ Showing gridlines
 - ☐ Changing Calculation mode etc.
- ✓ Live Session Exercise
 - ☐ Working with Cells/Ranges
 - ☐ Difference between Keyboard Shortcuts and Hot Keys
 - ☐ Use of Short/Hot keys and Mouse
 - ☐ Auto-Fit Content to Column Width / Row Height
 - ☐ Adding/Deleting/Moving/Copy cells/ranges
- ✓ Splitting data of Single Column into multiple
 - ☐ Import data from text file into Excel
- √ 10 Examples to use Auto-fill and Flash Fill
- ✓ Merge/Unmerge Cells & Wrap Text
- ✓ Extracting Unique Values & Important Ribbon, General and Data Entry Keyboard Shortcuts



Formatting Essentials



- ✓ Formatting Essentials
 - ☐ First thing First Exploring Universal Formatting Rules
 - ☐ Recognizing Text & Number entries.
 - ☐ How Excel stores *Date & Time Stamps* etc.
 - ☐ Recognizing Text Representation of Numbers
- ✓ Custom Cell Number Formats
 - ☐ Converts a number into Currency format, Negative format, Percentile format, Phone Number format
 - ☐ Displays 0 at start of a number without converting in text format
 - ☐ Shows *Text* with *Number* without converting in text
- ✓ Custom Date/Time Formats
 - ☐ How to custom Date / Time in different format as per need
- ✓ Working with Comments / Notes
 - ☐ Introducing New Type of Comments (For 365 Users* only)
 - ☐ Inserting, Modifying & Deleing Comments with different methods
- ✓ Format Painter A Quick way to copy 'Formatting Attribute'
- ✓ Paste Special
 - ☐ Pasting specific attributes like Value, Formulas, Comments, Column Width, Basic Mathematical Operations etc.
- ✓ Table, Table Styles & Formatting
 - ☐ Introducing Excel Table Feature (a way to quickly convert your data-set into dynamic table)
 - ☐ Live example
- ✓ Freeze Panes
 - ☐ Freeze Rows, Columns etc.
- ✓ Page Setup & Print Formatting



Functions & Formulas





☐ Difference between Functions & Formulas

- ✓ Basics of Functions & Formulas
- ✓ Working with Cell References Types
 - ☐ Relative Cell References
 - ☐ Absolute Cell References
 - ☐ Row Relative & Column Absolute Cell References and vice-versa
- ✓ Most Used Basics & Advanced Functions & Formulas
 - ☐ Text Functions
 - ☐ Date & Time Functions
 - ☐ Mathematical
 - Statistical Functions
 - Logical Functions
 - ☐ Lookup & Reference Functions
 - ☐ Newly Introduced Excel Functions
 - ☐ Customized Formulas Tricks
- ✓ Working with Array Formulas
- ✓ Creating Customize Formulas Step-by-Step with Live examples
- ✓ Creating and Working with Dynamic Ranges using Function and Excel Table features
- ✓ Formulas Debugging / Formulas Auditing
- ✓ Types of Formula Errors / Error Handling Tricks





List of Functions (Basics + Advanced/Customized)





- √ Text Functions
 - ☐ CLEAN, CONCATENATE, LEFT, RIGHT, MID, LEN, LOWER, UPPER, PROPER, REPT, TRIM, VALUE, FIND, SEARCH, SUBSTITUTE, and TEXT etc.
- ✓ Date & Time Functions
 - □ DATE, DAYS, TIME, NOW, TODAY, EDATE, EOMONTH, NETWORKDAYS, NETWORKDAYS.INTL, WEEKDAY, WEEKNUM, WORKDAY, and WORKDAY.INTL etc.
- ✓ Math & Trig Functions
 - ☐ INT, MOD, ROUND, ROUNDDOWN, ROUNDUP, SUM, SUMIF, SUMIFS, SUMPRODUCT etc.
- ✓ Statistical Functions
 - AVERAGE, COUNT, COUNTA, COUNTBLANK, MAX, MIN, COUNTIF, COUNTIFS, SMALL, and LARGE etc.
- √ Logical Functions
 - ☐ IF, IFS, AND, OR, and IFERROR.
- ✓ Lookup & Reference Functions
 - ☐ FORMULATEXT, VLOOKUP, HLOOKUP, INDEX, MATCH, INDIRECT, and OFFSET

- ✓ Newly Introduced Functions in Recent Version of Excel*
 - ☐ CONCAT, TEXTJOIN, IFS, SWITCH
- √ Nested Conditions/Customize Formulas*
 - ☐ One dimensional dynamic lookup
 - ☐ Two dimensional dynamic lookup
 - ☐ Formulas for calculating Aging
 - ☐ Calculate remaining/pending days and weeks in a year
 - ☐ Finding out Weekend/Weekday dates
 - ☐ Nested IF condition (using multiple criteria)
 - ☐ Extracting First, Middle & Last Name dynamically
 - ☐ Formulas to get Sum/Average of Nth Top/Bottom values
 - Merge Numbers & Text by keeping Number formatting alive
 - ☐ Extract Date or Time from Date-Time stamp
 - ☐ Reverse lookup
 - ☐ Many more....



Data Analysis

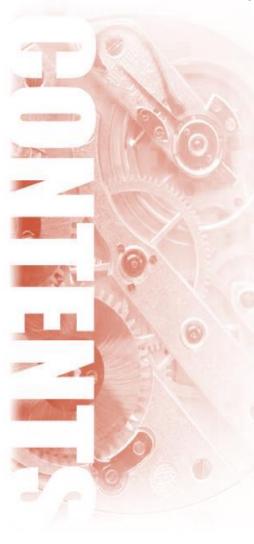


- ✓ Data Sorting
 - ☐ Introduction to Data Sorting
 - ☐ Simple Sorting basis on cell value
 - ☐ Advanced / Multilevel Sorting
 - ☐ Sorting based on Cell Colors, Font Color etc.
- ✓ Data Filtering
 - ☐ What is Filter and How to apply?
 - Basics of Filters
 - ☐ Sorting with Filter
 - Advanced Filter
 - ☐ Conditional Filtering
- √ Named Ranges
 - ☐ Introduction to Defined Names
 - ☐ Assigning Name to Cells and Ranges
 - ☐ Use of Named Ranges in Functions & Formulas
 - ☐ Working with Dynamic Ranges
- ✓ Conditional Formatting
 - ☐ Introduction to Conditional Formatting
 - ☐ Exploring all CF Rules in Detail
 - ☐ Formatting Cells based on values using different Styles

- ☐ Formatting Cell Values using Traffic Indicators/Icons
- ☐ Highlighting Cells containing Specific Text
- ☐ Highlighting Top/Bottom Values (Simple & Dynamic Examples)
- ☐ Highlighting Unique/Duplicate Values
- ☐ Highlighting Rows/Columns with empty Cells
- ☐ Highlighting using Functions/Formulas
- ☐ Highlighting Weekday/Weekend Dates using CF
- ✓ Data Validation
 - ☐ What is Data Validation in Excel?
 - ☐ Exploring all Data Validation Rules in detail
 - ☐ Setting up Input and Error Messages
 - ☐ Validating Numbers, Decimals, Date, Text Length etc.
 - ☐ Data Validation using Functions & Formulas
 - ☐ Validating Data using Named Range
 - Dynamic Drop Down List
 - ☐ Dynamic Dependent Drop Down List



Excel Charts



- ✓ Introduction to Excel Charts
- Exploring most commonly used Charts and Templates
- ✓ Basics of Charts
- ✓ Selecting Requirement based Charts
- ✓ Working with Basic Charts:
 - ☐ Column / Clustered / Stacked Column
 - ☐ Line / Line with Markers
 - Bar
 - ☐ Pie / Pie of Pie
 - Map
 - ☐ Clustered Column with Line etc.
- ✓ Creating Customized / Advanced Charts
- ✓ Creating Dynamic Chart
- ✓ Working with Dynamic Interactive Charts in Excelusing Drop Down
- ✓ Working with Chart Elements, Formatting, Chart Styles, Properties etc.



Pivot Tables



- ✓ Introduction to Pivot Table
- ✓ Creating a Pivot Table
 - ☐ Basics of Pivot Table Creation (Planning and Studying the Data)
 - ☐ Two Dimensional Pivot Table Summary
- ✓ Use of Calculated Fields/Items
- ✓ Pivot Table Formatting
- ✓ Grouping Items & Summarizing data in Pivot Tables
- ✓ Grouping and Bucketing data in Pivot Table
- ✓ Changing/Modifying Data Sources
- ✓ Working with Pivot Table Designs & Layouts
- ✓ Exploring Important Pivot Table Options & Field Settings
 - □ Formatting Empty Cells
- ✓ Pivot Table Filters
- ✓ Changing Pivot Table Summary Calculation
- ✓ Use of Slicers in Pivot Table
- ✓ Introduction to Pivot Charts



Quick Tips & Tricks



Bonus Module

- ✓ Protecting Workbook/Worksheets/Ranges
- √ 'Go To Special' Feature and Its' Uses
- √ 350+ Window Keyboard Shortcuts Guide (Cheat-Sheet)
 - ☐ 30 Quick Time Saving Excel Keyboard Shortcuts to increase productivity
 - ☐ Learn with Live Examples & Easy way to Best Practice
- √ 150+ Mac Excel Keyboard Shortcuts Guide
- Exploring Some Ready to Use Templates and Industry Dashboards
- ✓ Session Study Material
 - ☐ Session Study Material with solved examples after every session
 - ☐ Access to some Excel Videos*
 - ☐ Excel Formula Tips
- ✓ Real Life Case Studies and Situations for Best Practice and Get Ready for Corporate World
- ✓ Bi-Monthly Quiz
- ✓ Situation based Questions for Practice
- ✓ 6 Months Live Support via Phone/Email/Messages





Excel in Corporate World with VBA

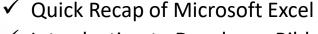
Course Content – Visual Basics for Applications (VBA)

		Duration: 4 Weeks / ~16 Hours
➤ Getting Started with VBA	-	02 hours
> VBA Nuts & Bolts	_	02 hours
➤ Working with Loops, Conditional Stmnts & Arrays	:.c5	03 hours
➤ Formula Writing in VBA	311111111111111111111111111111111111111	03 hours
➤ UserForm & GUI		02 hours
➤ Working with Excel Features	-	02 hours
➤ Interaction with Other Applications (Bonus)	_	01 hour
> Q & A	-	0.5 hour



Getting Started with VBA

Module 1



- ✓ Introduction to Developer Ribbon Tab
- ✓ Introduction to VBA
- ✓ What is VBA / Macro in Excel?
 - ☐ Difference between VBA and Macros
- ✓ Introduction to Visual Basic Editor Window
 - ☐ Open Visual Basic Editor (VBE)
- ✓ Getting Familiar with Visual Basic Editor (VBE)
 - ☐ Project Explorer ☐ Properties Window
 - ☐ Immediate Window ☐ Menu Bar
 - ☐ Run Button
 - ☐ Reset Button
- Breakpoints
 - Watch Window
- Locals Window

☐ Insert Button

■ Object Explorer

☐ Code Window

- ✓ Customizing the VBE Environment
- ✓ The Macro Recorder
 - ☐ Recording Your First Macros in Excel
 - ☐ Steps to record a Macro
 - ☐ Relative References vs Absolute Reference in Macro Recording
 - Ways to Run Macros
 - ☐ Live Project: Dynamic Cell Selection (Using Excel Go to Feature)
- ✓ Executing / Modifying Recorded Macros
- Saving Macro Workbook





VBA Nuts & Bolts

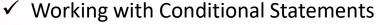


- ✓ Introduction to Sub and Function Procedures
 - ☐ Declaring Procedures
 - ☐ Procedures' Scope (Public/Private Procedures)
- ✓ Introducing the Excel VBA Object Model (A must know thing to become Pro in VBA)
 - ☐ Object Hierarchy (Objects and Collections)
- ✓ Properties and Methods
 - ☐ Working with Object Properties
 - ☐ Working with Object Methods
 - ☐ Live Case Study Working with Comment Object
- ✓ Important and Useful Properties of Application Object
- ✓ Working with Ranges Objects
 - ☐ Selecting, Copying, Pasting ranges
- ✓ Working with Comments
 - ☐ Tips to make a best use of comments
- ✓ Variable, Data Types and Constant
 - ☐ Rules for Naming Variable
 - ☐ Declaring & Initializing Variables
 - ☐ VBA built-in data types
 - ☐ Variable Scope and Working with Constant
- ✓ Finding Last or Next available Row/Column
 - Selecting Rows/Columns/Table (Normally & Dynamically)



Working with Loops, Conditional Statements & Arrays





- ☐ Types of Conditional Statements
- ☐ Use of Simple and Nested IF conditions
- ☐ IF with AND, OR & NOT
- ☐ Alternative of IF, a Select CASE statement
- ✓ Working with Loops
 - ☐ For Next Loop (aka Counter Loop)
 - ☐ For Each Loop
 - Normal Do-Loop
 - Do Until
 - ☐ Do While Loop
 - ☐ While Wend Loop
- ✓ Working with Message & Inbox Box
- ✓ With-End With Constructs
- ✓ Controlling Program Flow
 - ☐ Use of GoTo statements
- ✓ Introduction to Arrays
 - Declaring arrays
 - ☐ Declaring Multidimensional arrays
 - ☐ Static Arrays vs Dynamic Arrays
 - ☐ Working with Dynamic Arrays





Formula Writing in VBA

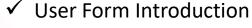


- ✓ Introduction to Excel VBA Functions and Worksheet Functions
- ✓ Difference between R1C1 and A1 style referencing
- ✓ Difference between Worksheet Functions Vs Active.cell Formula
- ✓ Getting started with VBA Excel Functions
 - ☐ IIf, UCase, LCase, Date, StrReverse, Split, RemoveVowels, InStr, Date, DateSerial, Format, MonthName etc.
- ✓ Getting started with WorksheetFunction
- ✓ Working with Function Procedures
- ✓ Getting started with User Defined Functions (UDF)
 - ☐ UDF with No, One, & Multiple arguments
 - ☐ UDF to Sum Each Digit in a Cell
 - ☐ UDF to extract only numbers from alphanumeric cell
 - ☐ Function with an Array argument
- ✓ Fixing arguments of Formulas in VBA
- ✓ Working and Creating Customize Functions
- ✓ Error Handling & Debugging Techniques
 - ☐ Trapping Errors (Ingoing Error or Jumping to specific section)



User Form and GUI





- Basics of UserForm
- ☐ Creating, displaying and unloading UserForms
- ☐ Understanding the settings of UserForm's Properties
- ✓ Exploring Form Controls & ActiveX Controls
 - ☐ List Box Control
 - ☐ Scroll Bar Control
 - ☐ Check Box
- ✓ Exploring UserForm Controls
 - ☐ Customizing control toolbox
 - ☐ Filling Data into controls
 - ☐ Adjusting UserForm controls
- ✓ Cycle/Sequence to follow to create UserForm
- ✓ Validating User Inputs
- ✓ Testing a UserForm
- ✓ User Form Tricks
- ✓ Understanding User Form Events
 - ☐ Relevant UserForm Events
 - ☐ Control Events





Working with Excel Features



Module 6

✓ Working with Pivot Tables ☐ Recording & Modifying macro to create Pivot Table Writing codes to create Pivot Table Report Working with Pivot Table Fields and Items **Updating Pivot Tables** ☐ Generating multiple Pivot Table reports using VBA ✓ Charts ☐ Difference between embedded chart and chart sheets ☐ Understanding the Chart object model ☐ Creating an Excel Chart using VBA ☐ Changing Chart Type and Series Type ■ Modifying Charts ☐ Creating Spark-line Chart in Excel using VBA ☐ Looping through all charts available in worksheet ☐ Adjusting Size and Aligning ChartObjects ✓ Sorting & Filtering ☐ Recording a macro to sort the table ☐ Understanding and modifying the recorded macro ☐ Performing Simple sorting Dynamic and multilevel sorting ☐ Filter and display relevant information

Add-Ins & Interaction with Other Applications





- ✓ Add-Inns
 - ☐ Introduction to Add-Ins
 - ☐ Add-Inn vs COM Add-Ins
 - ☐ How to Create Add-Inn
 - ☐ Installing an Add-Ins
- ✓ Type of different Excel events
 - ☐ Workbook Events (Open, Activate, SheetActivate, BeforeSave, NewSheet, Deactivate etc.)
 - ☐ Worksheet Events (Activate, BeforeRightClick, BeforeDoubleClick, Calculate, PivotTableUpdate etc.)
- ✓ Starting an application from Excel
 - ☐ VBA Shell function to launch other programs
 - ☐ Creating a new Word Document
- ✓ Interacting with Microsoft Office Apps
 - ☐ Opening a Word Document
 - Opening Outlook
 - ☐ Launching PowerPoint
- ✓ Controlling Excel from another application
- ✓ Sending Personalized emails via Outlook
- ✓ Sending e-mail attachments from Excel
- ✓ Working with Files & Folders
- ✓ Converting / Saving Excel File into PDF



Key Take Away

Upon Completion of this course, you will be able to:

- Proficient in Ms-Excel(Basics & Advanced) & VBA/Macros
- Having good command on keyboard shortcuts/Hotkeys
- Skilled in formatting the small and large datasets using Excel & VBA both
- Capable of coding and handling the large data
- Automate many Excel Features using VBA/Macros
- Able to choose the appropriate function/formula for any situation
- Building own formulas for customize requirements
- Navigating through Excel efficiently & effectively
- Able to create dynamic ranges
- Debugging the functions/formulas
- Understanding the functionality of simple and Complex functions & formulas
- Design your own User Defined Functions in easy steps using VBA
- Plotting various charts & tables using Excel & VBA
- Creating various reports using different features & functions
- Having strong knowledge of Advanced Formulas
- Able to analyze any data with Excel VBA
- Ability to create Good Looking and World Class Dashboards
- Recording and Cleaning Macros Easily
- Use Form Controls, Active-x Controls
- Make User Form like a Pro
- Make Automate your existing Reports



