

EXCEL with MIS Reporting



Part1:Excel Fundamentals



- The excel dashboard
- Understanding and working with the excel interface
- Tabs & the ribbon
- Quick access toolbar
- Formula & Status Bar
- Moving, finding and selecting in a spreadsheet
- Cell contents (e.g. Font colors and styles)
- Changing default excel settings
- Frequency of auto recovery
- Default view
- Autocorrect and ribbon alterations
- Referring from one workbook to another excel workbook
- Updating external references when opening a workbook
- Warnings: losing data through moving files
- Losing control through reliance on other workbooks.
- How to share a file to collaborate with other users working on different machines
- Avoiding and resolving conflicts
- Protecting cells, sheets and workbooks
- Avoiding excel crashes by monitoring and reducing file size and complexity
- Troubleshooting
- Minimizing fallout when an official crash occurs
- Copying cells, rows, columns and entire worksheets
- Simple and 'special' pasting with associated issues
- Inserting cells, rows, columns and effect of using shift to do so
- The two main views - normal and page break preview
- Freezing and unfreezing panes
- Tiling and arranging windows, new windows
- Grouping columns and rows (preferred to hiding)
- Group layers and examples of good usage
- Subtotaling across categories and warnings about what can go wrong with this
- Connecting (linking) cells and how connected cells behave
- Manipulating cells
- Absolute references (dollar signs) for cells and columns
- The "f4" shortcut
- Dropdowns to improve the integrity of data
- What's allowable
- Consideration of permissible values in a custom list implementation

Part2:Advance Excel Functions



Sorting & filtering

- Sorting data in various ways - quickly, 'properly', horizontally and vertically
- Auto- multiple- and advanced filters
- Alternative techniques to filtering

Date & time functions

- Adding
- Subtracting
- Manipulation of dates; now, today;
- What the serial number is
- Second through to year functions
- Calculating networking days

Text functions

- Find functions
- Len functions
- Left functions
- Mid functions
- Right functions
- Three case functions: cleaning and trimming; & and concatenate

Lookup & reference functions

- VLookup (and HLookup)
- Matching (exactly)
- Indexing data separately;
- Powerful index-match combination with warnings



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Part2:Advance Excel Functions



Logical & information functions

- True
- False
- Comparison operators (<, >, =, etc); and, or, ==
- Isnumber
- Iserror
- If functions
- If-iserror combo
- Nested functions

Named ranges

- Benefits over normal cell references
- How to set a named range up using the name box
- Using named ranges to navigate
- Print area as a named range

Mathematical functions

- Arithmetic operations
- Use of brackets
- Various ways to sum
- Counting numbers
- Sumproduct and its use in weighted averages

Data summarizing

- Advanced subtotals
- Formatting the subtotal rows
- Adding and copying with subtotals
- Consolidating data
- Introducing the sumif command
- Working with the sumif command
- Using array formulas
- Looking at autosum tricks
- Utilizing fill handle tricks



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Part2:Advance Excel Functions



Working with pivot tables

- Creating a pivot table
- Rearranging fields in a pivot table
- Explaining the report layout options
- Using the report filters feature
- Using top 10 & date filters
- Handling blank cells
- Drilling down in the pivot table
- Sorting a pivot table
- Formatting a pivot table
- Creating custom formats
- Adding formulas to a pivot table
- Changing a calculation in a pivot table
- Replicating a pivot table
- Counting with a pivot table
- Using pivot charts

Charts

- Charts refresher
- Moving, sizing & copying charts
- Formatting charts
- Formatting a series
- Exploring the home & format ribbons
- Deciding what chart format to use
- Show a time series with column or line charts
- Using combination charts
- Using line chart accessories
- Using bar charts to show comparisons
- Using component charts
- Using correlation charts
- Exploring other charts
- Chart lies revealed & advanced chart types
- Creating a custom layout

Getting visual

- Using conditional formatting
- Using advanced conditional formatting
- Highlighting, sorting & filtering columns
- Using smart art functions
- Using different smart art graphics
- Embedding a formula into a shape

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