

Advanced Excel 2021 and Microsoft 365

Hands-on course of 3 days - 21h

Ref.: ECU - Price 2024: CHF1 300 (excl. taxes)

This course is designed to help you improve your skills in Excel 2021 and Microsoft 365. You will become proficient in PivotTable-based data analysis, formula nesting and graphical communication.

EDUCATIONAL OBJECTIVES

At the end of the training, the trainee will be able to:

- Exploit and analyse data
- Create advanced calculation formulas
- Share and protect workbooks
- Use charts to highlight data
- Automate simple tasks

TEACHING METHODS

Active instruction is used throughout the course, based on examples, demonstrations, experience sharing, case studies and evaluation.

Discussions, experience sharing, demonstrations, supervised work and case studies to practise throughout the course.

THE PROGRAMME

last updated: 08/2023

1) Organising data tables

- Become proficient in best practices: use structured references, identify and delete duplicates, etc.
- Check the validity of input data.
- Learn Power Query to import, transform and consolidate data.

Hands-on work : Consolidating initial knowledge. Preparing and cleaning data sets. Logging in and creating queries on external data.

2) Exploiting data with PivotTables

- Create PivotTables. Use grouping possibilities (dates, numbers, etc.).
- Integrate calculations: deviations, percentages, totals, calculated fields, etc.
- Filter dynamically bas on segments and chronologies.
- Present PivotTables: layout, subtotals, formatting.
- Establish a relationship, learn about the data model and Power Pivot.

Hands-on work : Trying out the many analysis methods of PivotTables.

3) Using calculation functions and tools

- Enhance formulas with relative, absolute and mixed references and named ranges.
- Implement functions: conditional, dates, statistics, searches, logical, text.
- Build nested formulas.
- Use audit tools and simulation commands: target value, scenario, forecasts.
- Learn about dynamic array functions.
- Discover Excel 2021's flagship functions: FILTER, XMATCH and UNIQUE.

Hands-on work : Building calculation tables using advanced functions.

4) Checking input and sharing workbooks

- Share a workbook on the cloud; advantages and limitations.

PARTICIPANTS

Anyone wishing to improve their Excel 2021 and Microsoft 365 skills.

PREREQUISITES

Good knowledge of Excel 2021 or Microsoft 365's basic features or knowledge equivalent to that provided by the "Getting Started with Excel 365 and Microsoft 365" course (ref. ECU).

TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more. Participants also complete a placement test before and after the course to measure the skills they've developed.

TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@ORSYS.fr to review your request and its feasibility.

- Protect spreadsheets and workbooks.

Hands-on work : Securing data input and sharing a workbook.

5) Enhancing your visual data

- Choose the right chart type for the data to be illustrated.
- Create two-axis, combo, hierarchy and statistics charts (treemap, funnel, waterfall).
- Use pivot charts. Discover map charts.
- Integrate trend curves, sparklines and forecasts.
- Enhance charts with new Office illustrations.

Hands-on work : Creating effective charts.

6) Introduction to macros

- Define, save and secure a macro.
- Assign a macro to a button or an icon. Customise the quick access toolbar.
- View the associated VBA code.

Hands-on work : Automating frequent and repetitive tasks.

DATES

REMOTE CLASS

2025 : 17 Mar, 02 Jul, 22 Sep, 19
Nov