

Excel for Executives

Overview

In this course, you will learn everything you need to know to become an advanced Excel user. From charts & pivot tables to creating “hot” dashboards (and much more).

If you want to move up the management ladder, you need a good grasp of Excel!

This course is very hands on! Delegates will undertake a whole series of exercises that one encounters in the business environment as part of building up their Excel skill set.

Please refer to the agenda for the core topics of Excel functionality that delegates will become familiar with. The course focuses



the Excel skill set required to use Excel efficiently and uses examples that relate directly to the workplace. As a result, we spend a large part of the course building dashboards, macros, controls and buttons, automation, pivot tables, charting and making use of the built in formula's and functions .

Dedicated exercises are included to help delegates build up their knowledge progressively.

As part of the course, all delegates will receive a subscription to the whole course as Elearning. Furthermore, they will receive “cheat sheets” in both electronic format and a hard copy.



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Level: Intermediate to Advanced Excel.

Duration: 3 days.

Suitable for:

- Anyone who knows Excel but now needs to take the next step to speed up their workflow.
- Anyone who wants to become an advanced Excel user.
- **Please note that we use examples across all business departments** e.g. Accounts, HR, Admin, Analysis etc. In other words it does not matter which department you come from.

Who is this course not for?

- Anyone who is a new user to Excel or does not know how to perform basic functions in Excel. For example, we would expect you to:
 - ◇ Understand what Excel is and how to use it.
 - ◇ Format cells, including colour, fill, data type e.g. currency, date etc.
 - ◇ Put together a basic spreadsheet.
 - ◇ Print, copy, paste, sort & name sheets.
 - ◇ Use some of the basic formula's eg. autosum

Since the target of this course is to take delegates to the intermediate and advanced level, delegates will therefore be required to have a basic understanding of Excel already. *We will make some introductory videos available for those who register for the course to recap the core introductory concepts.*

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Agenda

1. A Recap of the “Basics” of Excel

Since there are many people who attend this course with varying degrees of Excel skills, we have to find a baseline in order to start. As a result, we spend the first couple hours of this course simply recapping the Excel essentials and ensuring that delegates are familiar with the jargon that is used when dealing with the Excel interface that we will be using throughout the course. Delegates will LEARN BY DOING. All the recap sections are divided into a series of exercises which will help them recap the basics. Please note that we assume you already know the “basics” of spreadsheets. Our focus in this session is to familiarise yourself with the jargon and learn alternatives and shortcuts to common procedures. Some of the key topics include:

- A Tour of Ribbons, tabs and the Excel Windows.
- Key shortcuts and cursor status.
- Auto Complete.
- Selecting, adding and moving Cells, Columns or Rows.
- Working with large amounts of data efficiently.
- Using Excel windows.
- Inserting shapes, arrows, and other visual features.
- Styles and Themes.
 - ◊ Template styles;
 - ◊ Custom Styles.
- Sheet & workbook protection & sharing;
- Filtering data and sorting data.
- Tables and “quick charts”.
- Excel Comments and why they are not recommended.
- Superior alternative to comments with navigation and hyperlinks.
- Superior alternatives for the Presentation of information.

2. Working with Formula’s and functions

- Creating a Basic Formula.
- Excel’s Order of Operations.
- Relative and absolute Cell References.
- Some common Business Functions.
- Shortcuts to speed up workflow for functions.
- Array functions.
- Rounding - The mistake everyone makes.
- Understanding strings.
- Joining Strings of Text Together.
- String functions.
- Dealing with Dates!
- Date addition and formatting.
- Date Functions

Delegates will undertake a series of exercises that one regularly encounters in business to practice functions.

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3. Building logic into your spreadsheets, array formula's & ToolPacks

- Understanding the IF function and it's variations (e.g the "nested if").
- The if series of functions e.g. averageif, sumif etc.
- The "D" functions.
- Getting to grips with Lookup's.
- The power of Index and Indirect
- The "IS" function set and error function set.
- Array functions
- The "offset" function.
- Nesting and utilising the above functions efficiently and tricks of the trade.

Using lookup's and logic is a critical component of becoming an advanced Excel user. As a result we will use some "real life" business applications and use these functions to find solutions efficiently.

4. Charts

- Understanding chart terminology.
- Understanding the Ribbon and the Design, Layout, and Format tabs.
- Creating charts.
- Exploring chart types.
- Rules for presenting charts.
- Formatting charts.
- Working with axes, labels, gridlines, and other chart elements.
- Fine tuning charts.
- Working with multiple axes.
- Inverting data.
- Sparklines.
- Trending Methods.
- Customising your charts.
- Adding unique graphics to charts for effect.

Delegates will choose different types of charts depending on the source data. By the end of this session, delegates will be very proficient with charts.

5. Working with Local Data External data

- Tables.
- A more detailed look at Sorting and filters.
- Grouping data.
- Excel Forms
- Conditional formatting and Heat Maps.
- Data validation and drop down lists.
- Getting rid of duplicates.
- Embedding and Linking Objects.
- Sharing Data with Other Office Applications.

Delegates will practice all the above tools by working with extensive examples.

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6. Pivot Tables and Pivot charts.

- Creating PivotTables.
- Manipulating PivotTable data.
- Slicing & Dicing.
- Grouping for Presentation.
- Addition of custom fields.
- Summaries and alternatives for displaying values in different ways.
- Calculated Fields.
- Layouts and Totals.
- Filters and Advanced Filters.
- Using Pivot Charts.
- Getting to grip with Slicers.

Delegates will practice all the above tools by working with extensive examples.

7. Dashboard Controls

- Drop down boxes.
- Option Boxes.
- Check Boxes.
- Sliders.
- Buttons.
- The Camera tool.
- Linking data and automating

8. Macros

- An Introduction to macro Recording and automating.
- Absolute vs relative.
- Attaching macros to buttons, shapes and icons.
- Rules for macro recording.
- Some handy macros:
 - ◇ Navigation macros.
 - ◇ Pivot table macros.
 - ◇ Calculation macros
 - ◇ Filter and Sort Macros
 - ◇ Search and highlight macros etc.

9. Creating a Dashboard and Advanced Reports

- Rules for creating dashboards
- Creating your own dashboard.
- Creating a simple dashboard.
- Creating a more detailed dashboard.

The ultimate target of the course is to be able to get data from multiple sources and in multiple formats, work with it, analyse it and present it as a user-friendly dashboard. Delegates will combine all of their skills in the course to develop a dashboard.

10. Going forward

- A brief look at the power of VBA.

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Some clients who have attended our Public Training



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Tutor: Mark Raffaelli CFA,FRM

Mark is a practising CFA Charterholder and fellow member of the Global Association of Risk Professionals (FRM).

Mark's extensive experience includes:

- Trading in Spot & Derivative Products professionally.
- Fund & Bank consulting regarding valuations, curves, Var, surveillance automation for Mifid II and local legislation etc.
- Development of quantitative financial models for surveillance, performance attribution, price validation, price models, risk (in particular Var) and automation.
- Developments of Apps for the investment and insurance industry.
- Mark programs in: Python, Javascript (including Angular and Ionic), Php, Excel VBA, R and ".net".



Those who have attended Mark's courses will know about his passion and ability to cut through jargon, simplify technical issues and provide real life examples.

What makes Geometric Progression different from other providers:

- We don't regurgitate traditional textbooks; instead we share real life experiences.
- We explain all the products as they relate to your own lives in plain English.
- We practice what we preach i.e. We are an authorised Financial Services Provider (License no:43244).
- We love multimedia and include video and film in all our courses.
- We are one of the few providers that offer advanced courses relating to the financial markets, modelling and implementation.