

**Course Name**

# Mastering MS Excel for Reporting

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**Sector Name**

Information Technology

**Document Type**

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## Mastering MS Excel for Reporting

### Course Introduction

Excel is a tool that enables most professionals to be more productive and efficient in managing data. While there are other database systems like Oracle (ORCL) and SAP (SAP) being used in HR related functions, exporting that data into Excel allows users to discover trends, summarize expenses and hours by pay period, month, or year, and better understand how the workforce is spread out by function or pay level. It allows HR professionals to create a spreadsheet full of employee data and analyze financial implications for cost planning.

This training course is designed to provide participants with techniques, applications, and basic knowledge on using MS Excel for reporting and preparing HR related documents such as employee compensation, salary, leave, benefit, and the like.

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## Mastering MS Excel for Reporting

### Target Audience

- ✓ Cloud Computing Engineer
- ✓ Computer Network Specialist
- ✓ Computer Support Specialist
- ✓ Database Administrator
- ✓ Information Technology Analyst
- ✓ Information Technology Leadership
- ✓ Information Security Specialist
- ✓ Software/Application Developer
- ✓ Web Developer
- ✓ Technology sales consultant

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## Mastering MS Excel for Reporting

### Learning Objectives

- ✓ Gain a comprehensive understanding of MS Excel techniques and applications used in reporting, particularly in HR related tasks and documents.
- ✓ Create special flash and management reports by linking Excel with Access, web, text, SQL, and other databases
- ✓ Use pivot tables and pivot charts to prepare the HR report, analysis, and reconciliation most efficiently.
- ✓ Repeat tasks and generate reports efficiently by recording, running, and editing macros
- ✓ Acquire numerous tips and tricks that will improve working efficiency

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## Mastering MS Excel for Reporting

### Course Outline

#### ✓ Day 01

##### **Data Massaging: Tools And Techniques**

- ✓ Consolidating data from separate files and sheets
- ✓ Advanced data validation using lists, dates and custom validation
- ✓ Cell management tools: left, right, mid, concatenate, value
- ✓ Naming, editing, and managing cells and ranges
- ✓ Subtotal, Sumif, Sumifs, Sumproduct, Count, Countif, Countifs
- ✓ Looking-up data, texts, and values using Vlookup
- ✓ The incredible table-tools technique
- ✓ Slicing dates into day names, weeks, week numbers, month names, years and quarters
- ✓ Text to columns and dynamic trimming using Trim, Len
- ✓ Managing texts and numbers using replace, find, and substitute
- ✓ Text change functions

##### **Reporting, Analysis And Reconciliations Using Pivot Tables**

- ✓ The 20 must learn rules • Creating and copying pivot tables
- ✓ number formatting techniques
- ✓ Designing report layout
- ✓ Sorting in ascending, descending and more sort options
- ✓ Filtering labels and values
- ✓ Expanding and collapsing reports
- ✓ Summarize data by sum, average, minimum, maximum, count

- ✓ Show values as % of total and % of
- ✓ Pivot table options
- ✓ Drill down option
- ✓ Showing report filter pages
- ✓ Inserting formulas
- ✓ Date analysis

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### Course Outline

#### ✓ Day 02

##### **Creating pivot charts**

- ✓ Dynamic chart labeling
- ✓ Mastering the slicer
- ✓ Linking pivot tables and pivot graphs with PowerPoint
- ✓ Conditional formatting with pivot tables
- ✓ Designing reports using GetPivotData

##### **HR Reports**

- ✓ Listing reports with custom views
- ✓ Preparing reports using pivot tables
- ✓ Consolidation of data

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### Course Outline

#### ✓ Day 03

##### **Cells and Name Ranges**

- ✓ Creating name ranges for data
- ✓ Using name ranges for value calculations
- ✓ Creating names from the selection command
- ✓ Creating a 3-D formula
- ✓ Updating name ranges
- ✓ Editing name ranges

##### **HR Data Formatting**

- ✓ Formatting numbers
- ✓ Formatting dates
- ✓ Conditional formatting
- ✓ Avoiding duplication of employee records
- ✓ Data bars for performance appraisal
- ✓ Icon sets for job level
- ✓ Color scale for employees' grades
- ✓ Greater or less than for earnings
- ✓ Based on a formula
- ✓ Setting warnings on the residency expiry date

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### Course Outline

#### ✓ Day 04

##### **Automate HR Repetitive Tasks**

- ✓ Creating macros for HR reports
- ✓ Using macros for monthly reports
- ✓ Saving macros in the personnel macros workbook
- ✓ Assigning macros to the Quick Access toolbar

##### **Data Calculations**

- ✓ Date and time functions for attendance
- ✓ Working days
- ✓ Years of service
- ✓ Logical and Statistical Functions
- ✓ Employee pay increase and bonus (paste special)
- ✓ Implement HR policies
- ✓ Statistical functions for HR data
- ✓ Sumif / sumifs / count / countif / countifs / subtotal
- ✓ Average / averageif / averageifs
- ✓ Lookup Functions
- ✓ Vlookup and Hlookup
- ✓ Approximate and exact match
- ✓ Index and match functions

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#### ✓ Day 05

##### **Creating Masters With Data Validation**

- ✓ Employee status, locations, and grades
- ✓ Employee designations, nationalities, and departments
- ✓ Date and number validation
- ✓ Custom validation
- ✓ Leave Records And Calculations
- ✓ Is the employee eligible for leave or a bonus? If function
- ✓ Accrued leave
- ✓ Leave taken records
- ✓ Leave balance
- ✓ Payroll And Benefits
- ✓ Payroll sheet and salary slips
- ✓ Using attendance data to calculate payroll

##### **End Of Service Calculations**

- ✓ Computing gratuity
- ✓ Computing cashable leave
- ✓ HR Charts And Graphs
- ✓ Speedometer chart
- ✓ Performance against range
- ✓ Spinner

- ✓ Comprehensive Exercises
- ✓ Calculating gratuity
- ✓ Salary increment calculator
- ✓ Performance review scores

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### Confirmed Sessions

| FROM           | TO             | DURATION | FEES       | LOCATION         |
|----------------|----------------|----------|------------|------------------|
| June 28, 2027  | July 2, 2027   | 5 days   | 4250.00 \$ | UAE , Dubai      |
| Sept. 5, 2027  | Sept. 9, 2027  | 5 days   | 4250.00 \$ | KSA , Riyadh     |
| Dec. 14, 2026  | Dec. 18, 2026  | 5 days   | 4250.00 \$ | UAE , Abu Dhabi  |
| March 15, 2027 | March 19, 2027 | 5 days   | 4950.00 \$ | England , London |

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