
Intermediate Excel - Hands-On (Bring Your Own Laptop)

November 12th, 9:00am – 4:30pm
Bond Place Hotel (near Dundas & Yonge)
Toronto, ON



\$399 + HST (bring a 2nd person and save 20%)

This course is for you if:

- You want to learn how to exploit Excel's features to help you get more done
- You want to learn how to manage, manipulate, slice and dice data
- You want to learn how to automate processes using Excel (without VBA)
- You want to create more visually effective charts and dashboards

By intermediate I mean that you are familiar with Excel and use it regularly in your day job. You regularly use functions such SUM, VLOOKUP and IF but perhaps not INDEX/MATCH, OFFSET or array functions such as SUMPRODUCT. You can sort and filter data but don't use Outlines, Pivot tables or Lists. You can create a chart, but they require manual updating and they look a lot like the default chart layouts (which visually ineffective!).

If you bring your laptop with at least Excel 2007 installed, this will be a hands-on session. In addition to the course materials, you will receive a spreadsheet that demonstrates key points and provides an opportunity for you to follow along and try the techniques you are learning about.

Below is the tentative agenda. As this will likely be a small group of 4-8 attendees, I plan to weave in topics, examples and/or issues from your day-to-day responsibilities.

Further, I hope and expect that you will share your tips, tricks and techniques with me and the rest of the group.

If you or someone you know is interested in participating in this course, please register with me as soon as possible at (416) 479-0125, tomscott@jerts.com

Tentative Agenda (to be tailored to participant needs)

Fundamentals of Professional Spreadsheet Design

- Separating data, calculations and presentations
- Managing and validating data
- A simple approach to complex formulae

Getting and Managing Data

- Getting data from outside Excel
- Transforming and normalizing data
- Data validation
- Tables and lists

Tentative Agenda con't

Keys to making the spreadsheet do all the work

- Named ranges and dynamic named ranges
- Automation without VBA code

Slicing and Dicing Data

- Lists
- Pivot Tables and slicers
- A look at PowerPivot

Exploiting the Power of Array Functions

- What is an array formula?
- How to exploit SUMPRODUCT
- How to exploit INDEX and MATCH

Creating Charts and Visualizations

- Choosing the right chart for the job
- Information density
- Choosing a colour scheme
- Using graphic design principles
- Step away from the defaults

Minimizing Spreadsheet Risk in Your Organization

- What is Spreadsheet Risk?
- What can you do to minimize the risk?