



# EXCEL TIPS & TRICKS AND EXTENDED REPORTING

INCLUDE OVER 100 HANDS-ON EXERCISES

DATE : 26-27 JUNE 2023 (MON-TUE)

TIME : 9:00AM - 5:30PM

VENUE : CPD ACADEMY, RIO PUCHONG

## FEE

**Early Bird Offer** **RM 790**  
(before 11 Jun 2023)

**Special Offer** **RM 860**  
(before 19 Jun 2023)

**Normal Fee** **RM 930**

*Fee includes Course Notes, Lunches, Refreshments, Certificate of Completion and 6% Service Tax*



COURSE HIGHLIGHT : **EXCEL & CHATGPT & AI AUTOMATION**

## TRAINER PROFILE



### N. SELVAM

HRDF CERTIFIED TRAINER  
EXCEL & TABLEAU EXPERT, AUTHOR,  
CHARTERED ACCOUNTANT

**N. Selvam** is a Member of the Malaysian Institute of Accountants (MIA), Chartered Institute of Managements (CIMA), Chartered Global Management Accountant.

(CGMA) and a Certified Software Consultant. He runs a software consulting firm for over 30 years.

When Malaysia implemented GST, he was an authority on analysing the GST Audit File (GAF) using Excel. He conducted over 300 hands-on training session for MIA, CIMA, Customs and many big corporations.

He lectured for more than 6 years in a local university on Computerized Accounting and wrote 5 Users Guides. He is also the author of the book "SQL for Non-Technical Users Volume 1". In 2019, he was given TTT exemptions by HRDF. In 2020, he published two books on "Data Visualization with Tableau for Beginners" and he is now working on Volume 3.

## DAY ONE

### INTRODUCTION

**Excel is an electronic spreadsheet. Almost everybody in any organization works with Excel to accomplish specific tasks.**

**Excel has lots of commands, buttons, functions and formulas. There are also so many short-cuts, tips and tricks.**

**You will become more productive by learning many of the Tips and Tricks in Excel. You can substantially reduce the time taken to accomplish specific tasks in your daily work.**

### COURSE OBJECTIVES

At the end of this workshop, participants will be able to understand:

- A working knowledge of Excel Tips and Tricks as Excel is extensively used by all companies in the day-to-day operations
- Practical tips which can make a major difference on how to work with Excel.
- How to list and organize data
- How to present data in a clear and concise way to management for easy understanding.
- Better how to project planning and making future predictions based on raw data.
- How this course can primarily assist in reducing the time taken to complete certain tasks as we all know that short cuts saves times. This will explain why when you ask 2 people doing the same job, one takes 30 min and the other takes 1 hour.

### METHODOLOGY

The training workshop essentially comprises two main sessions with interactive discussion and activities designed to maximize learning.

- 20% training lecture and discussion
- 80 % hands on training

### WHO SHOULD ATTEND

- Ideal for all Microsoft Excel Users who use Excel in their daily work.
- You will be able to use many of the Short Cuts, Tips and Tricks immediately after attending this training.
- You will become more productive
- Finally, learning Tips and Tricks will add value to your career and possibly open new opportunities

### COURSE OUTLINE

8.30 am	Registration
9.00 am	Understand how to use many of the useful short-cut keys to speed data entry and movement in Excel e.g. Ctrl G
9.30 am	Learn over 50 practical tips and tricks e.g. Format Painter
10.30 am	Morning Tea Break
10.50 am	Learn to how to combine files using Power Query Tables
11.30 am	Learn many of the useful Excel Commands and Functions e.g. IF function
12.30 pm	Packed Lunch
1.30 pm	Learn Text Functions and Conditioning Formatting in Excel e.g. =LEN
2.00 pm	Learn about protection (Cell/ Worksheet/ Workbook)
2.30 pm	Learn when to use Lookup vs Index Match
3.30 pm	Afternoon Tea Break
3.50 pm	How to recover your Excel file in case of power failure
4.00 pm	Learn about conditional formatting
4.30 pm	Changing the settings in Excel Options
4.50 pm	<b>Excel Automation with AI</b>
5.10 pm	<b>How to use ChatGPT with Excel</b>
5.30 pm	End of Day One

*\*There will be extensive hands-on exercises and data sets will be provided together with a comprehensive training guide.*



Each attendee will be presented a **COMPLEMENTARY** copy of this book by Author Mr N Selvam

## DAY TWO

### INTRODUCTION

**Reporting is essential to monitor business performance over any period of time. It enables you to make better business decisions, project future results and drive improvements.**

**Pivot Tables and Charts is an ideal starting point for any handling reporting.**

### COURSE OBJECTIVES

At the end of this workshop, participants will be able to understand:

- How to create a Pivot Table and Chart
- How to create informational Pivot Tables using existing spreadsheets
- How to identify expanding and collapsing groups of data within a Pivot Table
- How to identify the best approach for formatting numbers within Pivot Tables
- Analyze and interpret outcome of Pivot Tables and calculated fields
- How to handle large quantities of data in a single go.
- How to summarize large data

### METHODOLOGY

The training workshop essentially comprises two main sessions with interactive discussion and activities designed to maximize learning.

- 20% training lecture and discussion
- 80 % hands on training

### WHO SHOULD ATTEND

- Ideal for all Microsoft Excel Users who are new to Pivot Tables.
- You will be able to use Pivot Tables and Pivot Charts immediately after attending this training.
- Also suitable for marketing, finance and HR executives who are required to generate reports and charts from any data sets
- Finally, learning about Pivot Tables and Charts will add value to your career and it is the starting point for anyone who wants to learn about Data Visualization tools such as Tableau.

### PARTICIPANT REQUIREMENT

- Pax must be using Microsoft Excel 2013 & above (earlier Versions will be an issue)
- Participants will be given the link to download the Data set & material

### COURSE OUTLINE

- Dashboard Reporting
- How to use Dashboards and Slicers with Pivot Tables and Pivot Charts
- 15 hands-on exercises to acquire skills sets to generate different types of Reports from the same data sets. Each Report shows the data from a different perspective

9.00 am	Concepts of Pivot Table
9.30 am	What are data sets and why you must convert to Tables before building your Pivot Tables
9.50 am	Creating a Pivot Table
10.30 am	Morning Tea Break
10.50 am	Creating Multiple Pivot Tables
11.30 am	Creating Various Reports Using Pivot Tables
12.30 pm	Packed Lunch
1.30 pm	Useful Short cut keys for Pivot Tables
2.00 pm	Creating Pivot Charts
2.20 pm	Inserting Pivot Chart
2.40 pm	Significance of the Design and Analysis Menu
3.00 pm	Components and Limitations of Pivot Table
3.30 pm	Afternoon Tea Break
3.50 pm	The general rules to follow when generating Pivot Tables
4.10 pm	Learn about the recommended Pivot Tables and Charts
4.30 pm	How to refresh your Pivot Tables
4.40 pm	How to generate various Pivot Charts based on the Pivot Tables
5.00 pm	<b>Getting started with Tableau Data Visualization Tool</b>
5.30 pm	End of Training



