

# Mastering Excel & Powerpoint

Hours: 32

## Advance Excel Content

### **MODULE 1: WORKBOOK MANAGEMENT & SETTINGS (FOUNDATIONS)**

#### **1.1 Workbook Configuration**

- Workbook properties (metadata, author, tags)
- Compatibility mode vs modern Excel
- File formats (.xlsx, .xlsm, .csv, .xlsb)

#### **1.2 Protection & Security**

- Protect workbook structure
- Protect worksheet (with selective permissions)
- Locking/unlocking cells
- Password encryption
- Hidden sheets and very hidden sheets

#### **1.3 Version Control & Inspection**

- Inspect Document tool
- Check compatibility
- Recover unsaved versions
- Track changes / version history (OneDrive-based)

#### **1.4 Comments & Collaboration**

- Comments vs Notes
- Threaded conversations

- @mentions
  - Sharing & permissions
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## **MODULE 2: ADVANCED DATA MANAGEMENT & FORMATTING**

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### **2.1 Advanced Sorting & Filtering**

- Multi-level sorting (custom lists)
  - Case-sensitive sorting
  - Advanced filtering (criteria range)
  - Filter by color/icon/value
  - Dynamic filtering (Top 10, Above average)
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### **2.2 Advanced Data Validation**

- List-based validation (dynamic)
  - Dependent dropdowns (INDIRECT)
  - Formula-based validation
  - Restrict duplicates
  - Allow/deny logic using IF
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### **2.3 Conditional Formatting (Expert Level)**

- Formula-driven conditional formatting
- Highlight entire rows based on conditions
- Heatmaps (color scales with logic)

- Data bars with thresholds
  - Icon sets (custom rules)
  - Managing multiple rules priority
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## **2.4 Custom Number Formatting**

- Conditional formats via custom codes
  - Text inside number formats
  - Hiding values using format
  - Accounting-specific formats
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## **2.5 Tables & Structured Data**

- Convert to Table (Ctrl + T)
  - Structured references
  - Table expansion logic
  - Table-based calculations
  - Removing duplicates intelligently
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# **MODULE 3: ADVANCED FORMULAS & FUNCTIONS (CORE)**

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## **3.1 Logical Functions**

- IF (nested, multiple conditions)
- IFS
- AND / OR combinations

- SWITCH function
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### **3.2 Lookup & Reference Functions**

- XLOOKUP (full capability)
  - XMATCH
  - INDEX + MATCH (multi-condition)
  - Horizontal + vertical lookup design
  - Two-way lookup models
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### **3.3 Dynamic Array Functions (Critical – New Excel)**

- FILTER
  - SORT / SORTBY
  - UNIQUE
  - SEQUENCE
  - Dynamic spills & references
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### **3.4 Text Functions (Advanced Data Cleaning)**

- TEXTJOIN
  - CONCAT vs CONCATENATE
  - LEFT / RIGHT / MID + SEARCH / FIND
  - SUBSTITUTE vs REPLACE
  - TRIM for data cleaning
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### **3.5 Date & Time Functions (HR-Relevant)**

- TODAY / NOW
  - DATEDIF
  - EOMONTH
  - NETWORKDAYS / WORKDAY
  - Custom ageing calculations
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### **3.6 Mathematical & Statistical Functions**

- SUMIFS / COUNTIFS
  - RANK
  - LARGE / SMALL
  - ROUND / ROUNDUP / ROUNDDOWN
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### **3.7 Advanced Functions (Expert Edge)**

- OFFSET
  - INDIRECT
  - CHOOSE
  - TRANSPOSE
  - Array-based logic combinations
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### **3.8 Error Handling**

- IFERROR
- ISERROR / ISBLANK / ISNUMBER

- Debugging formulas
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## **MODULE 4: DATA ANALYSIS & PIVOTING**

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### **4.1 Pivot Table – Intermediate to Advanced**

- Creating pivot tables from large datasets
  - Field arrangement logic
  - Sorting & filtering pivots
  - Grouping (date, numeric buckets)
  - Custom grouping
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### **4.2 Pivot Table Enhancements**

- Calculated fields
  - Calculated items
  - Running totals
  - % of total analysis
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### **4.3 Pivot Charts**

- Creating pivot charts
  - Linking to pivot filters
  - Interactive reporting
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### **4.4 Slicers & Timelines**

- Slicer connections across pivots
  - Design & formatting
  - Timeline filtering (date-based dashboards)
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#### **4.5 Data Model Basics**

- Relationships between tables
  - Using multiple tables in pivot
  - Intro to Power Pivot (light coverage for exam)
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### **MODULE 5: ADVANCED CHARTING & VISUALIZATION**

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#### **5.1 Advanced Chart Types**

- Combo charts (dual axis)
  - Waterfall chart
  - Histogram
  - Box & whisker
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#### **5.2 Chart Customization**

- Dynamic titles
  - Data labels with formulas
  - Secondary axis usage
  - Custom legends
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### 5.3 Dynamic Charts

- Charts based on dropdown selection
  - Named ranges for dynamic charts
  - Dashboard-style visualization
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### 5.4 KPI Visualization

- Traffic lights (RAG indicators)
  - Trend indicators
  - Mini charts (sparklines)
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## MODULE 6: AUTOMATION USING MACROS & VBA

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### 6.1 Macro Fundamentals

- Recording macros
  - Absolute vs relative macros
  - Running macros
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### 6.2 Editing Macros

- VBA editor basics
  - Modules
  - Editing recorded code
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### 6.3 Practical Automation

- Automate formatting
  - Automate report generation
  - Assign macros to buttons
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## **6.4 Security Considerations**

- Macro security settings
  - Trusted locations
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## **MODULE 7: DASHBOARD & MODEL BUILDING**

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### **7.1 Dashboard Fundamentals**

- Layout planning
  - Input vs output separation
  - User-friendly design
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### **7.2 Interactive Dashboards**

- Using slicers
  - Dropdown-driven reports
  - KPI boards
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### **7.3 Data Integration**

- Combine multiple sheets
- Dynamic reporting structure

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## 7.4 Real-world Models

- Analytics dashboard.

## **POWERPOINT TRAINING – DETAILED COURSE STRUCTURE**

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### **MODULE 1: POWERPOINT FUNDAMENTALS (CORE FOUNDATION)**

#### **1.1 Interface & Navigation**

- Ribbon, Tabs, Groups
- Slide pane vs outline view
- Notes section
- Slide sorter view
- Zoom & navigation shortcuts

#### **1.2 Presentation Basics**

- Creating new presentations
- Slide layouts and placeholders
- Adding/deleting/reordering slides
- Saving formats (.pptx, .pdf, .pptm)

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### **MODULE 2: SLIDE CONTENT DEVELOPMENT**

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#### **2.1 Text & Content Structuring**

- Bullet vs narrative text
- Text hierarchy (headline → subtext → detail)

- Alignment and spacing best practices

## **2.2 Shapes & Objects**

- Shapes, icons, lines
- Merging shapes
- Layering (bring forward/send backward)
- Grouping & alignment

## **2.3 Images & Media**

- Insert and format images
- Crop, compress, remove background
- Use of icons and illustrations

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# **MODULE 3: DESIGN & FORMAT MASTERY**

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## **3.1 Themes & Templates**

- Built-in themes
- Customizing themes
- Corporate branding

## **3.2 Slide Master (CRITICAL)**

- Creating master slides
- Custom layouts
- Font and color consistency
- Header/footer setup

## **3.3 Visual Design Principles**

- Contrast, alignment, repetition, proximity (CARP)
  - Font pairing
  - Color psychology
  - White space management
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## **MODULE 4: SMARTART, DIAGRAMS & INFOGRAPHICS**

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### **4.1 SmartArt Usage**

- Process diagrams
- Hierarchy structures (org charts)
- Cycles and relationships

### **4.2 Advanced Diagram Creation**

- Convert text → visual diagrams
- Custom flowcharts
- Strategic frameworks (SWOT, process flow)

### **4.3 Infographic Design**

- Turning data into visuals
  - Icon-based storytelling
  - Visual hierarchy creation
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## **MODULE 5: ANIMATIONS & TRANSITIONS (CORE DIFFERENTIATOR)**

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### **5.1 Transitions**

- Standard transitions
- Morph transition
- Timing control

## **5.2 Animations Fundamentals**

- Entrance, emphasis, exit animations
- Animation pane
- Sequence control

## **5.3 Advanced Animation Techniques**

- Motion paths
- Trigger-based animations
- Interactive storytelling
- Slide-by-slide narrative animation

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# **MODULE 6: DATA VISUALIZATION & INTEGRATION**

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## **6.1 Charts in PowerPoint**

- Column, bar, line charts
- Pie/donut charts
- Chart formatting

## **6.2 Advanced Charting**

- Combo charts
- Visual storytelling via charts
- Linking charts to Excel

## 6.3 Data Storytelling

- Turning numbers → insights → actions
  - Highlighting key metrics
  - Avoiding data clutter
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## MODULE 7: MEDIA & INTERACTIVITY

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### 7.1 Multimedia Integration

- Insert videos/audio
- Screen recording
- Playback settings

### 7.2 Interactive Features

- Hyperlinks
  - Action buttons
  - Zoom feature (interactive navigation)
  - Menu-driven presentations
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## MODULE 8: PRESENTATION STRUCTURING & STORYTELLING

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### 8.1 Slide Story Flow

- Opening → Problem → Analysis → Solution → Conclusion
- Logical narrative building

### 8.2 Business Storytelling Frameworks

- Pyramid Principle (very useful for HR/business)
- Before–After–Bridge storytelling
- Problem–Solution–Impact

### **8.3 Audience-Centric Design**

- Designing for CXO vs employees
  - Message clarity
  - Minimal text strategy
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## **MODULE 9: ADVANCED DESIGN & PROFESSIONAL PRESENTATIONS**

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### **9.1 Corporate Deck Creation**

- Branding standards
- Consistency across slides
- Layout grids

### **9.2 Executive Presentations**

- Insight-driven headlines
- One-slide summary design
- Data simplification

### **9.3 Training & Workshop Decks (Very Relevant for You)**

- Activity slides
  - Discussion prompts
  - Visual learning reinforcement
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## **MODULE 10: AUTOMATION & EFFICIENCY**

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### **10.1 Productivity Tools**

- Reuse slides
- Slide libraries
- Quick formatting tricks

### **10.2 Integration with Office**

- Embedding Excel
- Linking Word content
- Exporting to PDF/video

### **10.3 Templates for Teams**

- Creating reusable templates
- Standardizing corporate presentations

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## **MODULE 11: DELIVERY SKILLS & PRESENTATION CONTROL**

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### **11.1 Slide Show Features**

- Presenter view
- Notes usage
- Laser pointer/pen tools

### **11.2 Presentation Techniques**

- Voice modulation
- Engagement techniques

- Handling Q&A

### **11.3 Virtual Presentations**

- Presenting on Teams/Zoom
- Screen sharing optimization
- Audience interaction tools