Institute For MIS and Analytics
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Advanced Excel Mastery Program

- Basic
- Advance
- Professional

Advance Excel with MIS & Data Analytics Training Modules

- **Module 1: Excel for MIS & Data Analytics - Foundations**
- **Module 2: Advanced Excel Functions for Analytics**
- **Module 3: Data Analysis s MIS Reporting Tools Pivot Tables & Graphs for MIS**
- **Module 4: Automation s Productivity Excel Automation (Macro/VBA)**
- **Corporate Use Cases Q&A**
- **Case Study & Assignment on every topic**
- **Test Series on formulas to clear formula logics**

Description of Modules

Module 1: Excel for MIS & Data Analytics - Foundations Understanding MIS & Analytics

- What is MIS in corporates
- Role of Excel in Data Analytics
- Types of MIS Reports (Daily, Weekly, Monthly)
- Data accuracy, consistency C structure

Excel Best Practices

- Data formatting standards
- Naming conventions
- Freeze panes, data validation
- Removing duplicates & errors

Module 2: Advanced Excel Functions for Analytics Logical & Error Handling Functions

- IF, Nested IF
- IFS
- AND / OR
- Sumif / sumifs / countif / countifs
- IFERROR
- Practical business use cases

Lookup & Reference Functions

- VLOOKUP (limitations) / Vlookup match / Index double match
- HLOOKUP
- INDEX + MATCH (dynamic lookup)
- XLOOKUP (latest C powerful)
- Approximate vs Exact match

Text & Date Functions (MIS Ready)

- LEFT, RIGHT, MID
- LEN, TRIM, CLEAN
- CONCAT / TEXTJOIN
- TODAY, MONTH, YEAR, EOMONTH
- Date-based reporting logic

Module 3: Data Analysis & MIS Reporting Tools Pivot Tables & Graphs for MIS

- Creating Pivot Tables from raw data
- Grouping (Date, Month, Quarter)
- Calculated Fields
- Filters, Slicers C Timelines
- Multiple value fields

- Graph Types (Column, Pie, Line Chart, Waterfall etc)

Data Analysis Techniques

- Sorting C Advanced Filtering
- Conditional Formatting for KPIs
- Top/Bottom Analysis
- Variance Analysis
- Trend identification
- Sparkline
- Power Query Editor

Dashboard-Ready Data

- Structuring data for dashboards
- KPI design principles
- Color coding standards

Module 4: Automation & Productivity Excel Automation (Macro Not VBA)

- Excel Tables for dynamic reports
- Flash Fill
- Quick Analysis Tool
- Recording simple Macros (overview)
- Auto-refresh reports
- Macro recording & task automation

MIS Productivity Tips

- One-click reporting techniques
- Reusable templates
- Protecting sheets & formulas

- Exporting reports to PDF

Module 5: Corporate Use Cases & Q&A Real-Life Corporate MIS

Examples

- Sales MIS Report
- Dashboard
- KPI's
- Analytics Reports
- Excel with AI Overview & Automations

Q&A + Best Practices

- Common reporting mistakes
- How to reduce manual work
- Excel shortcuts for quick working

Complete Syllabus

BASIC EXCEL

WORKBOOK & WORKSHEET MANAGEMENT, INSERT/DELETE/RENAME/MOVE SHEETS, PAGE SETUP, MARGINS, PRINTING, FREEZE PANES, FORMAT PAINTER, EXCEL SHORTCUTS, RIBBON & QUICK ACCESS TOOLBAR, DATA TYPES & FORMATS, CELL/SHEET PROTECTION, PDF CONVERSION.

BASIC & INTERMEDIATE FUNCTIONS

SUM, AVERAGE, MAX, MIN, COUNT, COUNTA, COUNTBLANK, ROUND, RANK, SMALL, LARGE, LEFT, RIGHT, MID, LEN, TRIM, CLEAN, UPPER, LOWER, PROPER, CONCAT, DATE, DAY, MONTH, YEAR, TODAY, NOW, WORKDAY, NETWORKDAYS,

IF, AND, OR, NESTED IF, ISBLANK, ISERROR, ABS, PRODUCT.

DATA TOOLS & UTILITIES

SORT & ADVANCED SORT, FILTERS & ADVANCED FILTERS, REMOVE DUPLICATES, TEXT TO COLUMNS, FLASH FILL, PASTE SPECIAL OPTIONS, HYPERLINKS, CONSOLIDATE, SUBTOTAL, GROUPING/UNGROUPING, FORMULA AUDITING (TRACE PRECEDENTS/DEPENDENTS, EVALUATE FORMULA), NAMED RANGES, ERROR CHECKING.

DATA VALIDATION

- LIST, NUMBER, DATE & CUSTOM VALIDATION, FORMULA-BASED VALIDATION, CIRCLE INVALID DATA.

PIVOT TABLES & DASHBOARDS

- PIVOT TABLE CREATION, ROWS/COLUMNS/VALUES/FILTERS, GROUPING, CALCULATED FIELDS & ITEMS, PERCENTAGE ANALYSIS, SLICERS & TIMELINES, PIVOT CHARTS, DASHBOARD CREATION, DATA REFRESH.

ADVANCED FORMULAS

VLOOKUP, HLOOKUP, XLOOKUP, INDEX-MATCH (SINGLE & MULTIPLE), SUMIF/SUMIFS, COUNTIF/COUNTIFS, AVERAGEIF/AVERAGEIFS, OFFSET, CHOOSE, LOOKUP, SUBTOTAL, DATABASE FUNCTIONS (DSUM, DCOUNT, DMAX), FINANCIAL FUNCTIONS (PV, PMT, IPMT, PPMT).

CHARTS & VISUALIZATION

COLUMN, BAR, LINE, PIE, AREA, SCATTER, WATERFALL, COMBO CHARTS, CHART FORMATTING & LINKING.

CONDITIONAL FORMATTING

HIGHLIGHT RULES, TOP/BOTTOM, DATA BARS, COLOR SCALES, ICON SETS, DUPLICATE VALUES, KPI FORMATTING.

MACROS & AUTOMATION

MACRO RECORDING, ASSIGNING MACROS TO BUTTONS/TOOLBARS, BASIC AUTOMATION.

PROFESSIONAL EXCEL & AI

MIS REPORTS, DASHBOARDS, ANALYTICAL REPORTS, LOAN/INCOME TAX CALCULATORS, EXCEL WITH AI OVERVIEW, AI-ASSISTED FORMULAS, CHARTS & VISULAZATIONS

Project Works & Assignments

- Test series at each level
- MNC Test series
- Daily MIS
- Dash-Board
- Calculator
- Analysis on Data
- Analytical Reports
- MIS Format
- Computation on Data
- Graphical presentation of Data
- Recording of work through Macro
- Data Simulations
- Incentive calculation for Sales
- Simulations
- Business Forecasting
- Budgeting
- What If Analysis


BYLD
Bespoke
1298
897
582
315
01:22


Sales Dashboard
ABC Global
2014 Sales Trend
Top 5 Customers
Region
East
North
South
West
Salesperson
Anne Larsen
Sales by Salesperson
Transaction Count by Invoice Amount - 2014
Sales by Region for 2014


WB
Refresh
WB SALES DASHBOARD
48%
29%
25%
100%
100%


Thank You!
MIS
Analytics