






Excel Automation Training Course

Most of us who work in Excel do what we call repeatable tasks. Each day, week or month we clean up the same data, merge the same files or create the same report. Each time the process is the same but with different data. Wouldn't it be great if we could get Excel to do most of that repeatable work for us? The good news is that we can, and we don't need to be computer programmers to achieve it either!

We have identified 5 key Excel components that all contribute to automating these Repeatable Tasks.

Course Outline - with approximate time allocations

- Recorded Macros  1:00
- Power Query  6:00
- Power Pivot  1:00
- Word and Power Point Integration  1:00
- Visual Basic for Application  2:00

Where the onsite version of this course comes into its own is when we start applying these automation components on your own data. When you start to see your manual processes that seem to take forever, now being automated in a matter of minutes, it truly is mind blowing!

In light of this, as well as the fact that each client's automation requirements are unique, the approach to implementing this course onsite is completely flexible and is charged at a daily rate to accommodate this. Below are a few options of how we can run this course for you.

1. Comprehensive 2-day workshop of the full course content, and then an additional 1-2 days creating automation solutions for your own requirements. (3-4 days Total)
2. Summarized 1-day version of the course, covering the key components, and then an additional 1-2 days creating solutions on your own data. (2-3 days Total)
3. For each attendee to first complete the online version of the course and then schedule an onsite workshop to create solutions on their own data.

These 3 options are by no means exhaustive. We can tailor a course to suit your specific requirements. One point to note though is that the generic training component can be for up to 8 attendees, but when we start to implement solutions it is always best to break this down into teams of 3-4 people each.

A prerequisite for this course is that each attendee is highly proficient in Excel and has preferably completed our Excel Advanced Course.

Give us a call ([086 167 3923](tel:0861673923)) or drop us a mail (hello@summitsolutions.co.za) to discuss your Excel Automation Training Requirements. Details of each section are explained below.

Detailed Course Overview

✓ Recorded Macros – 1 hr:

Introduced in our Advanced Course, recording a Macro is one of the simplest ways to start automating your repeatable tasks as it uses standard Excel Features that you're already familiar with. We'll show you how to record and then execute your Macro, plus show you some really neat Tips and Tricks to ensure that your Macro will work on a different worksheet with the same layout but different data.

✓ Power Query – 6 hrs:

If manipulating Source Data into a Standard Tabular Format is your main automation requirement then Power Query is your go-to Tool. There are some truly amazing Transformation Tools that enable you to create a number of Applied Steps to manipulate your Data into the format you require. Unlike a recorded Macro, these steps can be easily edited once created and simply stored as a Query within a standard Excel Workbook to run on multiple data sources. This Power Query section is Broken down into 4 subsections:

- **Power Query Basics**

An overview of all the Main Features to get you started - **1 hr**

- **The Transform Toolset**

A systematic look at all the Transformation Tools available, comparing them to the standard Excel equivalent – **2.5 hrs**

- **Different Data Sources**

Pulling Data from CSVs, Folders, Access DBs and Excel Tables – **2 hrs**

- **Matching Data**

Dynamically comparing and Merging different sets of data – **0.5 hrs**

Power Query is by far the longest section of the course; however, the 1-hour Power Query Basics section would give you enough of a detailed overview for you to get started.

✓ Power Pivot – 1 hr:

Power Pivot wouldn't necessarily be considered as an Excel Automation Tool, however as the name suggests it has a number of Powerful features that enables us to build Pivot Tables over and above what the standard Pivot can give us. The Data Model is one of those features that enables us to build relationships between Tables and then create Reports across these tables without having to create and maintain multiple lookups. We also look at DAX Formula which definitely has the edge over Calculated Fields in standards Pivots. So, if building complex reports using Pivot Tables is your thing, then this will definitely be of interest to you.

✔ Word and Power Point Integration – 1 hr:

Most people end up using Word or PowerPoint to create their Static Reports. Again, this section wouldn't typically find its way into a standard Automation Course, however there are some really neat tips and tricks worth knowing to automatically update frequently created reports that can be a huge timesaver. As this course is all about saving you time, this section most definitely has its place here to help automate the entire Source-to-Report process.

✔ Visual Basic for Application – 2 hrs:

VBA has been around almost as long as Excel itself and unlike Power Query, which specifically helps us to acquire and manipulate data, VBA enables us to automate absolutely anything in Excel. As "Visual" and "Basic" as it is, it is still a coding language, which can be a little tricky to get your head around. In this section we help you understand some Key Coding components such as Variables, Properties and Methods and some useful coding practices such as For Loops and If Statements. We then use this knowledge to modify some downloaded Code Snippets off the Web to suit our own requirements and pop them into our very own Customised Ribbon! This last section is pretty straight forward and enables us to leverage the advantages of existing VBA Code without actually really understanding it!

Customer Feedback



"I would just like to thank Mark for his support over the training sessions, the team are totally pumped at what they learnt and are already putting it into practice which is saving them hours if not days of time"

- PATRICK MASON, KERRY INGREDIENTS

Give us a call on 086 167 3923 and let's start saving you time!