

Certificate in Microsoft Excel and Data Analytics (Fundamentals)



Welcome to

Microsoft Excel and Data Analytics (Fundamentals)

Earn 14 PD Hours

Enhance your professional toolkit with a certificate program built to strengthen your Excel proficiency and data analysis capabilities—skills essential for today's accounting and finance professionals.

This on-demand program offers seven comprehensive Excel courses, each crafted to address the practical needs of CPAs. From mastering formulas and functions to building dynamic charts and leveraging data tools, you'll gain hands-on experience with Excel features that can streamline financial reporting, budgeting, and audit preparation.

Module Topics Include:

- Introduction to Formulas
- Tables
- IF Statements
- Basic Charts
- Range Names and the Auditing Tool
- VLOOKUP, HLOOKUP, CHOOSE, MATCH and INDEX Functions
- Filtering, Sorting and Removing Duplicates

Delivery Methods:

On Demand Learning

Key Takeaways

This certificate will provide you with:

- A thorough overview of all aspects of Excel, including practical ways to perform job functions.
- Excel templates to follow along with the course and to keep as a useful reference.
- Relevant examples designed for finance and accounting professionals.
- A resume-boosting Excel certificate upon completion of all the included courses.
- 7 on-demand Excel courses so you can complete them when it's convenient.

Who Will Benefit

This course is ideal for CPAs, accountants, and finance professionals who already use Excel but want to deepen their skills with tools and techniques tailored specifically to their field. Whether you're looking to streamline workflows, enhance data analysis, or earn a resume-boosting certificate, this program offers practical, on-demand learning designed to fit your schedule and professional needs.

Earn a Digital Badge



Our new collection of digital badges can be earned through the completion of any of our certificate programs offered in our professional development catalogue. Collect these digital badges to add to your website, social profiles, email signature and more. These badges are an easy way to visually communicate your skills and accomplishments to your peers and network. Digital badges will be awarded based on course completion requirements.

Certificate Outline

Module 1

Introduction to Formulas

Preliminaries

- Cell addresses and worksheets
- Simple formatting, formulas, and auto fill
- Quick access toolbar

The Basics of Formulas

- Logical formulas
- Order of operations
- Absolute and relative addressing
- Dynamic Spreadsheet models

Module 2

Filtering, Sorting, Duplicates

Filtering

- Basic Filtering: number, date, text, colour, and using multiple filters at once

Sorting and Removing Duplicates

- Basic Sorting: cell or font colour, alphabetically, case sensitive, custom lists,
- Removing duplicates

Module 3

Basic Charts

Fundamental Charts

- Column, Bar, Pie, Stacked and Combo Charts
- Adding labels
- Handling missing or hidden data in charts

Intermediate Charts

- Line, Stacked, Scatter, Bubble, Radar, BMI Charts
- Adding and deleting elements on charts

Module 4

Range Names and the Auditing Tool

Range Name Basics

- Creating, modifying, and applying range names
- Range name tips and tricks
- Row and columns

Advanced Range Name Topics

- Using formulas to create range names
- Naming rows or columns
- Implicit intersection
- Worksheet level names

The Auditing Tool

- Trace precedents and dependents
- Auditing tool with multiple worksheets

Module 5

VLOOKUP, HLOOKUP, CHOOSE, MATCH, and INDEX Function

VLOOKUP, HLOOKUP and CHOOSE

- VLOOKUP True/False
- HLOOKUP
- Grades & Passing1
- CHOOSE Function

MATCH and INDEX

- EX Function
- MATCH and MATCH/INDEX Combination functions
- Copying formulas involving MATCH and INDEX
- Combining VLOOKUP and MATCH functions

Module 6

Tables

Auto-Update Formulas and Charts

- Range Names
- Tables and Charts
- Sales and Bill Lookup
- CHOOSE Function

Table Filters and Slicers

- Table Filters
- Sums and Charts with Slicers

Module 7

IF, IFS, IFERROR, SWITCH and IS Functions

IF and IFS Basics

- IFS Introduction
- OR, AND, with IF statements
- Odds and Evens
- Hedging

Advanced IF and IS Applications

- Bidding
- Quarter of the year
- SWITCH function
- Audit month
- Sales and units



ABOUT YOUR INSTRUCTOR **Wayne Winston**

Dr. Wayne Winston is a Professor Emeritus of Decision Sciences at the Kelley School of Business at Indiana University. He holds a B.S. in Mathematics from M.I.T. and a PhD in operations research from Yale. He won more than 40 teaching awards at Indiana University. He has written more than a dozen books including "Marketing Analytics", "Data Analysis and Decision Making", "Operations Research", "Practical Management Science", "Excel 2019 Data Analysis and Business Modeling", and "Mathletics." Dr. Winston has taught classes and consulted for many leading global organizations. He is also a two-time Jeopardy! champion and has consulted for the NBA's Dallas Mavericks and New York Knicks.

Have Questions? Speak to an Advisor.

To speak to one of our advisors, please fill out this [form](#).