

Agenda

Excel for Tax Auditors

Location: Institute of Finance

Date: 3 & 4 March 2025

:From 9:30 till 1:30

Time	
Day 1	
9:30 –10:00	Introduction <ul style="list-style-type: none"> ▪ Welcoming participants ▪ Course objectives ▪ Introducing METAC & IOF
10:00-11:30	Creating and Formatting Tables <ul style="list-style-type: none"> ▪ Creating tables from a range of cells ▪ Applying formatting options to tables Advanced Data Analysis <ul style="list-style-type: none"> ▪ Using Subtotal to summarize data ▪ Introduction to logical tests in Excel ▪ Utilizing IF statements for conditional calculations ▪ Applying the AND / OR functions for multiple criteria
11:30 – 12:00	Break
12:00-13:30	Visualization and Dashboards <ul style="list-style-type: none"> ▪ Creating graphs and charts ▪ Customizing graph elements and formatting ▪ Incorporating slicers for interactive dashboards Advanced Functions and Formulas <ul style="list-style-type: none"> ▪ Utilizing VLOOKUP for data lookup and retrieval ▪ Exploring HLOOKUP for horizontal lookup ▪ Understanding XLOOKUP as a versatile lookup function
Time	
Day 2	
9:30 –11:00	Data Cleaning and Transformation <ul style="list-style-type: none"> ▪ Leveraging Flash Fill for automated data formatting ▪ Introduction to Power Query Editor for data manipulation Conditional Formatting <ul style="list-style-type: none"> ▪ Applying conditional formatting rules to highlight data ▪ Customizing formatting options for different criteria ▪ Using conditional formatting for data analysis and visualization
11:00 – 11:30	Break
11:30 -13:30	Advanced Analysis with PivotTables <ul style="list-style-type: none"> ▪ Creating PivotTables for data summarization

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	Excel Tips and Tricks <ul style="list-style-type: none">▪ Time-saving shortcuts and techniques▪ Efficiency hacks for working with large datasets▪ Troubleshooting common Excel issues
13:30 – 14:00	Closing