

## ExecuTrain Course Outline

# Excel for HRD Professionals

1196 v04

2 Days

## Description

Data of an organization's most important asset – PEOPLE – is managed by HR Professionals. From Recruitment to Retirement, the information is stored, retrieved, used, and analyzed. This “domain-focused” course introduces various **techniques of Excel as used to manage information about Employees by Human Resource Professionals**. It uses Intermediate to Advanced level skills in Excel. Delegates will learn to modify worksheets to meet the needs of your Organization or HR Department. It teaches you several concepts, tricks, and techniques like VLOOKUPS, pivot tables, subtotals, functions, shortcuts, data outlining, charts and numerous other powerful tools to audit data from the various systems housing your HR data.

The course **does not use Excel VBA** and is **totally non-technical**.

## Prerequisites

Excel Beyond Basics course or equivalent knowledge.

## Who Should Take This Course?

HR Professionals who are familiar with HR Data and are using Excel for HR domain data.

## Objectives

- ✓ Organizing HR Data
- ✓ Working with Organization data
- ✓ Working with Employee Data
- ✓ Time and Attendance Data
- ✓ Leave Records
- ✓ Salary and Over Time
- ✓ Performance Management
- ✓ End of Service Calculations
- ✓ Recruitment Data
- ✓ Organizational Surveys
- ✓ HR Metrics
- ✓ HR Balance Score Cards

## Outline

### HR Data

HR Data Basics  
HR Data Dump  
Formatting HR Data  
Organization Data  
Employee Data

### Working with Organization Data (eg Grades, Designations)

Creating Masters

Organizational Hierarchy Sorting with Custom Lists  
Data Consistency using Data Validation

### Working with Employee Data (eg, Demographics, Joining date, Birth date, Document Expiry Date, Contact Numbers)

Formatting Lists, Numbers, and Dates  
Concatenation (Join Columns) and 'Text to Column'  
(Split Columns)  
Paste Special - Values  
Performing Calculations on Dates

Setting Warnings on Document Renewal Dates via Conditional Formatting  
Data Consistency using LOOKUP Function  
Use Custom Views to Permanently Save Multiple Reports from Same Sheet  
Remove Duplicates with Advanced Filter

### **Time and Attendance Data (Time Sheets, Attendance List, Imported data from Biometric or Other Time Capturing Systems)**

DATE Functions  
TIME Functions  
TIME Formats  
ROUNDING Time  
IF Function – Time worked in an Over-night shift  
Use Pivot Tables to get Project / Job Time Calculations from Time Sheets  
Use Absolute Formulas for Attendance Reports  
Late Comer's Reports  
Over Time Calculations (Time)

### **Leave Records**

Leave Accrued vs Leave Taken,  
Leave History  
Leave Balance  
Leave Report

### **Payroll and Overtime**

Lookup - Using Attendance Data to Calculate Salary  
Over Time Calculations (Money)  
Use IF Function to Calculate Increment  
Use Pivot Tables to get Employee wise Earning History  
Cost Centre Report – use LOOKUP  
Salary Slips  
Bank Letters

### **Performance Management Data**

Performance Appraisal Data  
Normal Distribution Curve

Statistical Analysis  
Training – planned vs actual  
Compare Identical  
Use EXACT Function

### **End of Service - Perform Comprehensive Calculations**

Compute Gratuity  
En cashable Leave

### **Recruitment Data (CV Bank to Appointment Letter)**

Use Filters and Sorting in CV Bank  
Incoming resumes  
Applicant sources  
Generate Appointment Letter  
Track Dates

### **Organizational Surveys – Analysis of Data**

Use of Percentage Analysis  
Use of MIN, MAX, Functions

### **HR Metrics**

Head Count  
Turnover rates  
Revenue Per Employee  
Nationality Diversity Ratio  
Gender Equality  
Youthfulness of Team – Age Ratio  
Years of Experience

### **Powerful Excel Productivity Tools**

Naming Ranges  
Compare two worksheets side by side  
Excel Text / Data to Speech  
GOTO "SPECIAL"  
Use Marcos to automate repetitive tasks