



WORKING WITH REPORTS IN EXCEL FOR ORGANISATIONAL REPORTING - IMPROVERS WORKSHOP

Designed for: KSF Leads, e-KSF Leads, ESR /OLM Leads and anyone keen to improve their Excel skills and take the pain out of organisational reporting

Workshop Overview

Although there are a number of systems being deployed within the NHS to make organisational HR and L&D reporting easier, the output of systems often needs to be manipulated to provide the data required to meet local needs, and data from these systems often needs to be compared and consolidated to give a holistic view. The purpose of this workshop is to demonstrate how functionality within Excel can be effectively used to help reduce the time required to automate common tasks and reduce the time required to complete reporting requirements.

The workshop will use sample extracts from the e-KSF, ESR and LMS systems to provide a practical demonstration of how functions can be used so you will be able to immediately practice and benefit from the skills that you will acquire from attending this workshop. The workshop is a hands-on session so you will be able to practice each of the functions that we will demonstrate during the day.

Workshop Programme

The workshop is structured into the following core sections:

| Session | What you will learn |
|----------------------------------|---|
| Sorting & filtering | We will show how advanced sorting and filtering techniques can be used to separate data for organisational reporting. |
| Conditional formatting | We will look at how you can use formulas to format reports to more easily show key data within a report. For example, highlight departments that are under a defined compliance level for KSF reviews or mandatory training. |
| Text formatting | We will look at how to increase the professional look of reports by using standard Excel formatting processes. This is particularly useful for reports exported from systems which contain a range of formatting styles. |
| Comparing lists | Within Excel it is possible to compare two lists and determine which items are duplicated (or not). This is a good way of trying to try and solve problems within reports generated manually or by systems. |
| Comparing and consolidating data | We will look at how the '=vlookup' function will help you to compare and consolidate multiple sources of data into a single report. This is of particular benefit for data cleansing. |
| Useful formulas | We will look at some more advanced formulas in Excel such as: <ul style="list-style-type: none">• How to compare data in different columns to determine when data is different or whether it meets the set criteria.• How to find out the minimum or maximum value quickly and easily within a series of data.• How to sum the numbers that meet specified criteria.• How to count the number of unique items in a series. |

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|---------------------------------|---|
| Preventing duplicate data entry | We will show how the data validation feature can be used to prevent duplicate entry within a range of cells. |
| Standardising list entries | To increase the consistency of data entry, a drop down list can be added to cells in a spreadsheet that contains a range of possible entries. This is particularly useful when spreadsheets are to be completed for a system upload. |
| Pivot tables | Pivot tables are a powerful reporting tool that can sort and sum data within a report quickly and easily to avoid the need to run multiple reports. We will take an example extract of staff data to quickly report on any number of factors, for example the number of staff with more than one assignment, the number of staff within each directorate with a post outline by ethnicity and gender. |
| Manipulating column data | There are two functions in Excel that are particularly useful for manipulating data within reports. These functions enable you to separate data held within a column into multiple columns or combine the data in multiple columns into a single column. Using these functions in conjunction with pivot tables we will show you how this can be practically applied. |
| Questions and answers | At the end of the workshop you will have the opportunity to ask questions on any of the functionality covered in the day or discuss any local reporting needs that maybe simplified by the use of advanced excel functions. |

Workshop Prerequisites

In order to benefit from the topics covered in this workshop we recommend that you have ECDL/NOS Level 2 equivalent competence in Excel. If you are unsure if you meet these requirements please contact us to discuss this in further detail.

Who will run the workshop?

The workshop will be facilitated by a trainer from the e-KSF National Account Management team, meaning that you will benefit from learning first hand from the tool experts.

What will the workshops cost?

In-House Training

We can run this workshop in-house for a fixed daily rate of £950+VAT (plus reasonable travel expenses) for up to 10 delegates per session. For additional details on running this workshop in-house please contact your regional e-KSF Account Manager or email info@e-ksf.org.

Public Workshops

We also host public workshops for £250+VAT per delegate. For additional details on upcoming public workshops please contact info@e-ksf.org or look at www.think-workshops.co.uk for upcoming dates.