

Course Name	: EXCEL FOR HR AND ADMINISTRATIVE PERSONNEL
Duration	: 2 days (Physical Classroom / Virtual Live instructor)
Skill Level	: Intermediate

COURSE DESCRIPTION:

This 2-day Excel training program is designed for HR and Administrative personnel who manage employee records, attendance, leave tracking, and headcount reporting in daily operations. The course provides practical and structured approaches to organizing HR data, maintaining accurate records, and generating reliable HR reports to support management decision-making. The training begins with proper HR data structuring and controlled data entry methods, followed by hands-on exercises using intermediate Excel formulas and lookup functions. Participants will learn to analyze HR data using sorting, filtering, Subtotals, and PivotTables, before presenting information through clear charts and simple HR dashboards. Realistic HR datasets and scenarios are used throughout the course to ensure immediate workplace applicability.

WHAT WILL YOU LEARN?

Throughout the course, participants will develop the skills to structure, analyze, and report HR data effectively using Microsoft Excel. Key learning areas include maintaining clean employee databases, automating attendance and leave calculations, applying intermediate formulas for HR metrics, and transforming raw HR data into meaningful summaries and visual reports suitable for management review.

PREREQUISITE:

Participants should have basic Microsoft Excel knowledge, including data entry, worksheet formatting, and simple formulas such as SUM and AVERAGE. No programming or VBA experience is required.

METHODOLOGY:

This program will be conducted with interactive lectures, guided demonstrations, discussions, and practical hands-on exercises using HR-related datasets. The course can be delivered as instructor-led training (ILT) or virtual instructor-led training (VILT).

JOB SCOPE:

This training enhances productivity and reporting capability for roles such as:

- HR Executive
- HR Officer
- HR Assistant
- Administrative Executive
- Administrative Assistant
- HR Generalist
- Office Manager
- People Operations Support Staff

MODULE 1: TROUBLESHOOTING AND ENHANCING PROFESSIONAL WORKBOOKS

- Welcome
- Course Overview
- Introduction to HR data structure and workbook organization
- Designing a staff master list including Employee ID, Name, Department, Position, Status, and Join Date
- Converting HR data ranges into Excel Tables
- Using filters to retrieve HR information by department, employment status, or contract type
- Identifying and cleaning common HR data issues such as duplicates and missing records

MODULE 2: DATA VALIDATION AND CONTROLLED HR INPUT

- Understanding relative and absolute cell references in HR calculations
- Creating named ranges for departments, job grades, and leave types
- Applying Data Validation to control HR data entry
- Creating drop-down lists for standardized HR inputs
- Building a simple HR input form linked to a structured database

MODULE 3: HR CALCULATIONS USING INTERMEDIATE FORMULAS

- Applying IF, nested IF, IFS, AND, and OR formulas for HR rules and conditions
- Using SUMIFS and COUNTIFS for headcount and attendance calculations
- Calculating HR metrics such as department headcount and total absences
- Using IFERROR to manage incomplete or inconsistent HR data

MODULE 4: LOOKUP FUNCTIONS FOR HR REPORTING

- Understanding the importance of lookup functions in HR data management
- Using VLOOKUP or XLOOKUP to retrieve employee details from master records
- Applying INDEX and MATCH for flexible HR lookups
- Linking attendance and leave records to the staff master list

MODULE 5: MANAGING ATTENDANCE AND LEAVE IN EXCEL

- Designing attendance and leave tracking templates
- Standardizing attendance and leave codes
- Calculating days present, absent, and on leave using formulas
- Applying Conditional Formatting to highlight attendance patterns

MODULE 6: SORTING, FILTERING, AND SUBTOTALS FOR HR REPORTING

- Applying multi-level sorting for HR datasets
- Using AutoFilter and Custom Filter for HR-related queries
- Applying Subtotals to summarize HR data by department or location
- Creating a basic monthly HR summary report

MODULE 7: PIVOTTABLES FOR HR DATA ANALYSIS

- Preparing HR datasets for PivotTable analysis
- Creating PivotTables for headcount and attendance reporting
- Grouping data by month, quarter, or year
- Analyzing HR trends using PivotTables

MODULE 8: HR DASHBOARDS AND BASIC WHAT-IF ANALYSIS

- Creating PivotCharts for HR reporting
- Adding slicers to create interactive HR dashboards
- Performing basic What-If analysis for simple HR planning scenarios
- Best practices for protecting HR files and templates

CONCLUSION

- QA
- Useful HR Excel templates and references
- Feedback

Excel for HR: From Data to Decisions

A high-level summary of a 2-day Excel training course for HR and Administrative professionals, highlighting key skills and the target audience.

