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COURSE BROCHURE

Spreadsheet Data Handling and Cleaning Essentials Training Course

5 – 9 July 2027
New York

Spreadsheet Data Handling and Cleaning Essentials Training Course

Ref: 2669_101726 **Date:** 5 – 9 July 2027 **Location:** New York **Fees:** 9500 GBP

Spreadsheet Data Handling and Cleaning Essentials is a 1-week training course for office professionals and junior analysts who receive, tidy and summarise business records, and it builds a clean reference workbook with a documented cleaning log. Reliable everyday decisions depend on tables that are complete, consistent and easy to check, yet many records still arrive messy from exports, forms and colleagues. Jupiter Prime Training offers this course for spreadsheet data handling at a foundation level.

Why Spreadsheet Data Handling and Cleaning Essentials Matters Now

Two forces shape spreadsheet data handling today. Records now arrive from many systems, each exporting dates, codes and names in its own format. Managers expect quick answers from these tables. Careful handling means quick reconciliations and trusted reports; careless handling means hours chasing duplicates and broken references. The course rests on a simple sequence of import, inspect, clean, structure, summarise and present, applied to tables from finance and operations.

Who Gains Most from Spreadsheet Data Handling and Cleaning Essentials

- Staff who receive exported lists and must prepare them for colleagues each week
- Administrators who keep registers of suppliers, assets, staff or customers up to date
- Coordinators who combine figures from several sources into one status sheet
- Junior analysts who answer routine questions about sales, costs or volumes
- Assistants who check submitted forms and expense records for errors

Back-office teams sharing registers gain most when several members attend together.

Spreadsheet Data Handling and Cleaning Essentials Capabilities

Participants move from untidy exports to tables colleagues can filter, total and audit.

- Apply import settings for delimiters, dates and leading zeros — the first check on every received file
- Build a tidy table with one header row and one record per row — colleagues who reuse the register
- Test records for blanks, duplicates and stray spaces — the reconciliation owner
- Calculate conditional counts, sums and averages — the manager asking a routine question
- Design a pivot summary and a simple chart — the weekly status meeting
- Specify drop-down lists and entry rules — whoever keys new records next

Key Spreadsheet Data Handling and Cleaning Essentials Terms

- Delimiter — the character, such as a comma or tab, that separates fields in an exported text file.
- Tidy table — a layout with one header row, one record per row and one kind of value per column.
- Lookup — a formula that finds a value in a reference list using a shared key such as a code.
- Conditional summary — a count, sum or average calculated only for rows meeting stated criteria.
- Pivot report — a summary that groups records by chosen fields and totals their values without formulas.
- Entry rule — a restriction on what a cell accepts, such as a date range or list of codes.

Spreadsheet Data Handling and Cleaning Essentials Day by Day

Day 1: Receiving and Importing Records

- Text File Import Settings — Choosing Delimiters, Encodings and Column Types
- Date and Number Recognition — Preventing Swapped Days and Lost Leading Zeros
- Source Inventory Sheet — Recording Where Each Table Came From
- Tidy Table Layout — Deciding Headers, Records and Column Meaning
- Named Table Ranges — Keeping Formulas Stable as Rows Grow

Day 2: Sorting, Filtering and Inspecting

- Multi-Level Sorting — Ordering Records by Region, Date and Amount
- Filter Criteria and Custom Views — Isolating Records for a Single Question
- Conditional Highlighting — Spotting Outliers, Blanks and Repeated Entries
- Freeze Panes and Grouping — Reading Long Registers Without Losing Context
- Quick Profile Counts — Judging Completeness Before Any Summary

Day 3: Cleaning and Restructuring

- Trimming and Case Functions — Removing Stray Spaces and Mixed Capitals
- Splitting and Joining Text — Separating Names, Codes and Addresses
- Duplicate Removal Rules — Deciding Which Repeated Record to Keep
- Find and Replace Patterns — Standardising Units, Spellings and Codes
- Cleaning Log Sheet — Documenting Every Change for Later Audit

Day 4: Lookups, Conditional Summaries and Pivots

- Exact Match Lookups — Pulling Prices, Owners or Categories from Reference Lists
- Lookup Error Handling — Flagging Missing Codes Instead of Hiding Them
- Conditional Count and Sum Formulas — Answering Routine Questions by Criteria
- Pivot Report Building — Grouping Records by Month, Team or Product
- Column and Line Charts — Showing Trends Clearly to Non-Specialists

Day 5: Practising the Clean Reference Workbook

- Drop-Down Lists and Entry Rules — Protecting Registers from Future Keying Errors
- Import and Inspection Rehearsal — Applying Day One and Day Two Checks
- Cleaning Sequence Rehearsal — Applying Day Three Steps to a Fresh Export
- Summary Sheet Assembly — Combining Lookups, Pivots and Charts on One Page
- Clean Reference Workbook — Completing the Tables, Summary and Cleaning Log

Applying Spreadsheet Data Handling and Cleaning Essentials After the Course

- Rebuild one shared register as a tidy table with entry rules, and record the changes in a cleaning log.
- Replace a manually typed weekly total with a pivot report and conditional summaries fed by the cleaned table.

Spreadsheet Data Handling and Cleaning Essentials Questions FAQ

What is Spreadsheet Data Handling and Cleaning Essentials and why does it matter now?

It is the set of foundation skills for importing, inspecting, cleaning and summarising business records in spreadsheets. It matters now because records arrive from more sources than before and managers expect quick, traceable answers.

Which roles gain most from Spreadsheet Data Handling and Cleaning Essentials?

Office professionals and junior analysts gain most. That includes administrators keeping registers, coordinators combining figures and assistants checking forms in finance and operations.

How does Spreadsheet Data Handling and Cleaning Essentials differ from an advanced spreadsheet analysis course?

It concentrates on dependable foundations rather than complex formulas. An advanced course assumes clean tables; this one teaches how to make them clean and summarised.

What do you bring back from Spreadsheet Data Handling and Cleaning Essentials?

You bring back a clean reference workbook built from a real export. It holds a tidy table, lookups, a pivot summary and a cleaning log colleagues can reuse.

Spreadsheet Data Handling and Cleaning Essentials: The Way Forward

The clean reference workbook is the starting point. Its first use is deciding which register a team trusts as its single source for a weekly report, and it serves the people who key, check and read those figures. After a month, revisit the cleaning log: repeated fixes show where an entry rule should change at the source.