



Excel VBA and Macros Training Course: Automating Workbooks, Reports and UserForms



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Introduction:

Excel VBA and Macros training, automating workbooks, reports and UserForms, is a 5-day course for analysts, finance staff and administrative power users that ends with a Macro-Driven Monthly Reporting Workbook. Units lose hours each month copying data between workbooks, reformatting the same report sheets and emailing files by hand, and every manual step invites errors that reach managers. Nominees already build formulas and tables in Excel every day but have not yet written code, and the course is taught as a hands-on lab in the Visual Basic Editor. CoreConcept Training Center delivers this Excel VBA and macros course.

Course Objectives:

- Record, inspect and clean up macros in the Visual Basic Editor, storing them in macro-enabled workbooks and the Personal Macro Workbook
- Write VBA code that reads and changes workbooks, worksheets and ranges through the Excel object model using variables, conditions and loops
- Build Sub procedures, user-defined functions and UserForms that capture and validate input from colleagues
- Consolidate data from many workbooks in a folder and drive Word and Outlook from Excel to produce and send reports
- Trap and debug runtime errors, then secure, sign and distribute macros as add-ins under Trust Center settings
- Produce a Macro-Driven Monthly Reporting Workbook that imports, builds, exports and emails a recurring report

Target Audience:

- Analysts responsible for recurring operational, sales or performance reports built in Excel
 - Finance and accounting staff who consolidate departmental or branch workbooks each period
 - Administrative and office staff who maintain trackers, registers and standard letters in Excel
 - Reporting and MIS staff who support colleagues with spreadsheet templates and tools
 - Team members who act as the Excel power user for their department
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Course Outline:

Day 1: Macro Recording, the Visual Basic Editor and Automation Candidates

- Automation Candidate Log of Repetitive Workbook Tasks
- Macro Recorder with Relative and Absolute References
- Visual Basic Editor Project Explorer, Properties and Code Windows
- Recorded Macro Clean-Up Removing Select and Activate Statements
- Macro-Enabled XLSM Files and the Personal Macro Workbook

Day 2: Excel Object Model and VBA Language Structure

- Excel Object Model Hierarchy from Application to Range
- Workbook, Worksheet and Range Properties, Methods and Collections
- Dim Statements, Data Types and Option Explicit Declarations
- If Then Else and Select Case Decision Logic
- For Next, For Each and Do While Loop Structures

Day 3: Procedures, UserForms, Consolidation and Office Integration

- Sub and Function Procedures with Arguments and Return Values
- User-Defined Functions Published as Worksheet Formulas
- UserForm Design with TextBox, ComboBox and CommandButton Controls
- Dir Function Folder Loop Consolidating Many Source Workbooks
- Word and Outlook Automation Through Object Library References

Day 4: Error Handling, Debugging, Macro Security and Distribution

- On Error Statements and the Err Object for Failure Handling
- Breakpoints, Watches, Immediate and Locals Window Debugging
- Trust Center Macro Settings, Trusted Locations and Blocked Internet Files
- SelfCert Digital Signature and Trusted Publisher Set-Up
- XLAM Add-In Packaging and Custom Ribbon Button Distribution

Day 5: Lab Building the Macro-Driven Monthly Reporting Workbook

- Reporting Case Brief and Macro Specification Sheet
 - Import Routine Consolidating Monthly Branch Files from a Folder
 - Report Builder Macro Formatting Sheets and Exporting PDF Files
 - Distribution Macro Emailing PDF Reports Through Outlook
 - Macro-Driven Monthly Reporting Workbook Testing, Signing and Handover
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Skills You Will Gain:

- Macro Recording and Editing
- VBA Object Model Navigation
- Procedure and Function Writing
- UserForm Building
- Multi-Workbook Consolidation
- Office Application Automation
- Runtime Error Handling
- Macro Security and Distribution

Why Attend This Course:

- Hand a Macro-Driven Monthly Reporting Workbook to the reporting manager who owns the monthly cycle, ready to run on the next period's files
- Judge which repetitive Excel tasks justify VBA code, which need only a recorded macro and which should stay manual
- Prevent copy-paste errors, broken file links and late reports caused by manual consolidation across many workbooks
- Share signed add-ins, a coding checklist and reusable procedures with colleagues who repeat the same workbook tasks

Conclusion:

Back at work, the participant hands the reporting manager a Macro-Driven Monthly Reporting Workbook that imports branch or department files from a folder, builds formatted report sheets, exports them to PDF and emails them through Outlook. The unit uses it to decide which reporting steps to retire from manual handling and who maintains the code. After the first monthly run, the unit should review the error log, the time taken against the manual baseline, any blocked or unsigned macros and whether source file layouts changed before extending the routine to other reports.

Frequently Asked Questions FAQ:

What should participants know before the Excel VBA and macros course?

Participants should use Excel daily and be comfortable with tables, formulas and sorting; no programming experience is needed. Bringing two or three repetitive workbook tasks from their own job, with sample files stripped of confidential data, helps them aim the lab exercises at real work.

How does the Excel VBA and macros course differ from an Excel data analysis course?

It teaches participants to write code that repeats tasks, builds reports and controls other Office applications. A data analysis course concentrates on formulas, PivotTables, statistics and query tools, which this course uses only lightly as raw material for automation.

Are Excel VBA macros safe to use in an organisation?

Yes, when they are controlled. Macros run with the user's rights, so organisations rely on Trust Center settings, trusted locations, digitally signed code and the default blocking of macros in files downloaded from the internet to stop unknown code from running.

What does a participant take back from the Excel VBA and macros course?

Each participant takes back a Macro-Driven Monthly Reporting Workbook with commented code that imports files from a folder, builds and formats report sheets, exports PDFs and emails them, plus reusable procedures and a signed add-in ready to adapt to their unit's reports.