

Excel for Operational Management (Microsoft 365 Apps)

The Microsoft Office Specialist: Excel for Operational Management Associate certification validates foundational skills in managing and analyzing operational data, planning and monitoring processes, optimizing resources, and communicating insights through reporting and visualization. Workbook examples include operational datasets, resource plans, dashboards, and process tracking models.

An individual earning this certification has approximately 150 hours of instruction and hands-on experience with Excel and operational management concepts. They have demonstrated associate-level proficiency and are prepared to enter the workforce.

Microsoft Office Specialist role-based certification exams assess a candidate's skills and abilities in Microsoft 365 applications through a performance-based format.

- The exam assesses a candidate's ability to integrate technical skills in a Microsoft 365 application with the real-world practices and knowledge of specific job roles.
- Task instructions generally do not include the command name. For example, function names are avoided and replaced with descriptors. This means individuals must understand the purpose and common usage of the program functionality to successfully complete each of the tasks in the projects.

Skills Measured

- Data management
- Process management
- Resource management
- Reporting and visualization

Microsoft Office Specialist Program is the only official Microsoft-recognized certification program for Microsoft Office globally.



Objective Domains

Data Management

Import and export data in Excel

- Import data from various sources
- Save and export workbooks in various file formats

Prepare and clean data in Excel

- Remove duplicate data
- Delete or hide rows, columns, and cells to simplify data
- Format cells for consistency
- Sort and filter data

Verify data integrity in Excel

- Apply Data Validation rules to restrict input
- Identify data outside defined standards or expected values

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Transform data in Excel

- Split a single data column into multiple columns
- Use formulas to combine data into a single worksheet
- Use text functions to extract or combine values
- Use formulas to transform dates and times
- Use Power Query to unpivot data

Prepare workbooks for collaboration in Excel

- Protect workbooks, worksheets, and cells
- Manage comments and notes

Process Management

Plan for operations in Excel

- Use formulas to develop a resource plan
- Calculate critical path from a Gantt chart
- Use Forecast Sheet to estimate future needs

Monitor and control operations in Excel

- Use formulas to track schedules and tasks
- Use statistical functions to monitor quality
- Use formulas to track compliance and escalations

Analyze data to support decisions in Excel

- Use Conditional Formatting to assess basic metrics and KPIs
- Use formulas to detect anomalies, outliers, and exceptions
- Analyze risk

Review and improve processes in Excel

- Identify trends
- Calculate growth metrics

Resource Management

Manage supply chain in Excel

- Use formulas to plan purchases
- Apply What-If Analysis to assess inventory risk
- Use Goal Seek to plan logistics

Manage financials in Excel

- Analyze budget variances
- Calculate profitability
- Use formulas to plan future operating budgets

Manage workforce in Excel

- Analyze employee lifecycle data
- Project workforce needs
- Use formulas to track employee compliance

Reporting and Visualization

Present data visually in Excel

- Create charts
- Create PivotTables to summarize data
- Create PivotCharts
- Evaluate and improve accessibility and usability

Create dashboards in Excel

- Modify dashboards to display accurate data
- Create interactive dashboards