

Excel Advanced

(Versions: 2013, 2016)

(Contents of this course have been created based on practical requirements)

2 Days

1. The Foundations & Concept of Data in Excel - our “3-2-1” Framework of Data

Three Types of Data

Dates

The challenge of “looks like date but does not behave like date”

What is a DATE?

Recommended Date Formatting - dd-mmm-yyyy

Extracting Month Name, Year, Day Name, Week Number, etc from a date.

Text

The main challenges

Cases

Spaces

Numbers

The ideal and recommended formatting - Accounting

Why Accounting is our recommendation

Formatting large numbers as thousands (1,234,567 as 1,234 k)

Formatting large numbers as millions with a decimal (1,234,567 as 1.2 M)

Two Sources of Data

Raw Data

Calculated Data

One Cell type - Range or Table

2. Data in “Excel Range” or in “Excel Tables” : The 1978 way of “Range” vs 2010 way of “Table”

Why copy formulas in the column after you have typed one?

Why expand “range” after addition of new row or column to data.

Use of Excel Tables - end of Excel “range” way.

Understand the benefits of using an Excel table over a range of data

Convert a data range into an Excel table

Review of the Excel table contextual tab

Quickly format a table with pre-defined table styles

Filter data within a table

Quickly add columns and rows into an existing table

Add a Total row to a table for quick calculations

Automatically add a function to all rows within a table

Learn the benefits of using an Excel table to create a PivotTable

Why name a Table with “tbl”?

3. The New era of PivotTables

The NEW way of Pivot Tables: Create a Pivot Table that works for LIFE -on

refresh, all new rows and columns of data should get included.

The commonly faced challenges in a Pivot, and solutions for them.

Challenge #1: There are lot of empty cells in the report - how to have “zero” value in all of them.

The FIVE Critical Pivot Table Options

Format Numbers (Not Cells)

Report format: Style and Design

Components to Format a Report

The Report: Sum, Count

The Report: Concept Of Data Cubes

The Problem Of Pivot Report not taking New Data

Show Amount as % Of Total

% of Grand Total or % of Column Total - which is better?

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4. Slicers for Data - avoid old FILTERS

Old Way of FILTERs vs NEW Way of SLICERS
 Concept of Horizontal Slicers
 Best practices for Slicer position and size
 Use of multiple columns
 Formatting Slicers using Styles
 Setting Default Slicer Style
 Deleting Slicers
 Glue your slicers so that even Excel can not move them
 Slicer Settings - best practices

5. Slicers for Reports

Slicers: One Pivot - Multiple Reports
 Super glue your slicers so that even Excel can not move them
 Positioning of Slicer with Pivot Tables
 To Print or Not to Print Slicers.
 Unlocking Slicers while Protecting a Sheet

6. Slicers for Pivot Charts and Dashboards

Slicers: One Slicers - Multiple Charts
 Controlling Multiple Pivot Tables / Pivot Charts with one Slicer
 Where to place slicers on the Canvas of Dashboard
 The concept of "Connections"

7. Logical Functions

=IF()
 =OR()
 =AND()
 =IF(IF(IF)) - Nested IF
 =IFERROR()

8. The daily grind of data warriors - Lookup Functions

=VLOOKUP()
 How to lookup Vertically for data - data in other columns.
 Eliminate the fixed range challenge created by "\$A\$1:\$M\$500" range way of VLOOKUP. Use TABLES
 Using VLOOKUP to find exact matches
 How to provide insurance against current and future "#N/A" errors
 Root Cause Analysis of why we get "#N/A" error and solutions to the root cause
 #N/A Reason: Unwanted Blank Spaces (bsp)
 #N/A Reason: Spaces that are NOT spaces in reality (Non Blank Spaces - nbsp)
 #N/A Reason: Transactional Data is text where as lookedup data is numbers.

#N/A Reason: Transactional Data is number where as lookedup data is text
 #N/A Reason: Spelling Mistakes

Looking across two different files without "\$A\$1:\$M\$500" range way.

Using VLOOKUP to Group number oriented data like Revenue, Stock, Accounts Receivables, Employee Tenure, etc using APPROXIMATE match component of VLOOKUP.

9. Text Functions to clean data

=SEARCH()
 =SUBSTITUTE()
 =LEN()
 =LEFT()
 =RIGHT()
 =MID()
 =TEXT()
 =PROPER()
 =TRIM()
 =CONCATENATE() (or "&")

10. Date Functions

Is it a Date?
 Calculate the exact service length in YEARS, MONTHS, DAYS without dividing by 365! Use function DATEDIF().
 Find the number of days between two dates using =NETWORKDAYS.INTL()
 Calander days
 Working Days (without FRI-SAT as weekends)
 Working Days (without Public Holidays and FRI-SAT as weekends)

11. Protection

Multiple Layers of Protecting your work in Excel
 Layer 1: Protecting a complete worksheet
 Objects Locked
 Tables
 Slicers
 Layer 2: Protecting a part of a worksheet
 Objects Locked
 Tables
 Objects Open
 Slicers
 Layer 3: Protecting a part of a worksheet
 Objects Locked
 Tables
 Slicers

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Objects Open
Any specific column

Layer 4: Protecting a Report
Objects Locked
Pivot Tables
Objects Open
Silcers

Layer 5: Protecting your Logic (Formulas)
Objects Locked
Cells with Formulas
Objects Open
Rest of the worksheet

Layer 6: Protecting your Structure of
Workbook
Structure Locked
Move
Copy
Hide

12. Creating Interactive Dashboards Screenshots

Dashboard planning
Use of Filters inside Pivots.
Using Pivot Charts
Why keep formatting all Charts manually -
let Excel do this work!
Using Slicers
Multiple Charts being controlled by several
Slicers - the inter-activity
Protecting your Dashboard

13. Keyboard Shortcuts

Total keyboard shortcuts - nearly 485,
classified into 36 categories by Team
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Which ones to Master - the priority
Absolutely Basic
Must Know
Nice to Know
Rarely Used
Use Mouse instead