



Modern Excel

The ESSENTIAL Skills



Table



Slicer



PivotTable



PivotChart



Interactive Dashboards



Table of Contents

Modern Excel – The ESSENTIAL Skills

Duration	3
Objectives	3
Pre-requisite	3

Outline of the ESSENTIAL Skills

1. THREE “Must Change” Excel Options	4
2. Understanding the TYPES and SOURCES of Data	4
The TYPES of Data	4
The Sources of Data	4
3. Foundations of Calculations in Excel	5
4. Cells on a Sheet	5
5. Multiple Sheets	6
6. Filtering & Sorting	6
7. Foundational Functions – an Introduction	6
8. Foundational Data Analysis – a peek	7
9. Printing Best Practices	7



Modern Excel – The ESSENTIAL Skills

A customizable course according to your company's requirements.

Duration

1 day (2 sessions of 3.5 hours each)

Objectives

The course aims to make an Excel user benefit from the inbuilt capabilities of Excel, rather than using it as a mere electronic spreadsheet application for TYPING reports.

The course starts from the foundations of TYPES and SOURCES of data as accepted by a cell in Excel. The focus is on inbuilt calculations and formatting capabilities.

The course delves into the concept of Absolute and Relative Reference while calculating numbers and handling non-numeric data via formulas and functions.

It covers all aspects of working with Cell, Range, Worksheet, and workbook. The course introduces the power of PIVOT TABLES, and IF and VLOOKUP functions.

The course is totally hands-on. No theory! No PowerPoint presentation. Throughout the course you practice the skills on Excel. The exercises are based on real-life data scenarios.

Pre-requisite

You must have worked on Excel for at least 3 months.



Outline of the ESSENTIAL Skills

1. THREE “Must Change” Excel Options

1. Stop wasting 5 seconds every time you open Excel: File >> Options >> General >> Start Up Options
2. Move away from “inches” to “millimeters”: File >> Options >> Advanced: Ruler Units
3. Customize “Quick Access Toolbar”.

2. Understanding the TYPES and SOURCES of Data

The 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

Shortcut to enter date perfectly

Text:

The main challenges: Cases and Spaces

Numbers:

The ideal and recommended formatting – Accounting.

Why Accounting is our recommendation?

Alternative to Accounting format when you want to center align the numbers.

Formatting Overflowing Numbers.

The Sources of Data

Raw Data

Calculated Data



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3. Foundations of Calculations in Excel

Entering Formulas

Entering Functions

The Structure of Functions

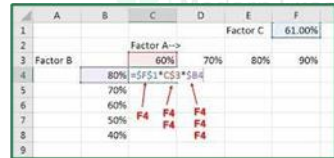
The =SUM() Function

Applying AutoSum

Editing Formulas – Using F2 Key

Types of References in Formulas:

Relative,
Mixed, and
Absolute

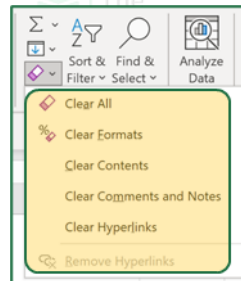


Use of F4 Key

4. Cells on a Sheet

The great Excel ERASER - CLEAR

- All
- Formats
- Contents
- Comments
- Notes
- Hyperlinks



Formatting

- Fills
- Borders

Freeze Panes

Switch Off Grid Lines



5. Multiple Sheets

Sheets within same File

Inserting New

Deleting

Moving

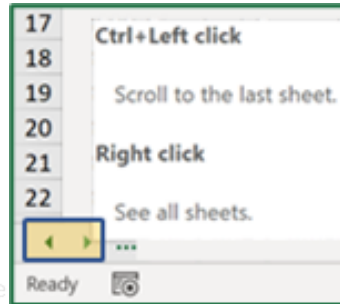
Copying

Hiding

Unhiding

Selecting Multiple Sheets

Navigating Large Number of Sheets



Sheets Across Files

Moving

Copying

To an Existing File

To a new File

6. Filtering & Sorting

Selecting the Range to Sort

Using SORT with multiple Criteria

Filtering Rows of Data

Clearing Multiple Filters in one Go

7. Foundational Functions – an Introduction

TRIM()
&

COUNTIF()

COUNTA()

SUMIF()

VLOOKUP()

IF()

SUBTOTAL()



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8. Foundational Data Analysis – a peek

Use of Pivot Tables

SUM, SUMIF, COUNT, and COUNTIF without formulas

9. Printing Best Practices

Working with Print Area

Headers and Footers

Adding

Removing



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