



Modern Excel

The

TRANSFORMATIVE

Advanced Skills



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Modern Excel – The TRANSFORMATIVE Advanced Skills

Modern Excel | Modern Excel | Modern Excel

An in-house developed course that can be customized according to your company's requirements.

Duration

2 days (4 sessions of 3.5 hours each)

Objectives



The course aims to transform your experience and engagement with Excel. We introduce transformative features of Excel.



The Modern Excel



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The course starts from foundations of data as accepted by a cell in Excel.

Transform Excel surface – use **Tables** instead of Range

Transform filtering - use playful **Slicers**.

Transform reporting: use **Pivot Tables**

Transform data lookup: VLOOKUP and **XLOOKUP**



Transform logical formulas: IF to **IFS**



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Transform default settings of Excel – **settings** that make **Excel easier to use**.

Transform Data cleaning – use Power Query

And, so on.

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



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You must have worked on Excel for at least 6 months.



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Table



Slicer



PivotTable



PivotChart



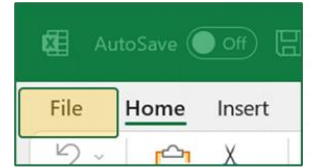
Interactive Dashboards



Outline of TRANSFORMATIVE Advanced Skills

1. Transform Excel - FIVE “Must Change” Excel Options

1. Get cell address reference in formulas in Tables: File >> Options >>
2. Eliminate “GETPIVOTDATA” when referencing data from PivotTable: File >> Options >>
3. Move away from “inches” to “millimeters”: File >> Options >>
4. Stop wasting 5 seconds every time you open Excel: File >> Options >>
5. Disable the “never used” Quick Analysis Feature: File >> Options >>



2. Transform Foundational Understanding

Understanding The Raw Material - 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 and Spaces

Numbers:

The ideal and recommended formatting – Accounting,

Why Accounting is our recommendation?

Understanding The Sources of Data

Raw Data

Calculated Data

Understanding Excel Surface

Range or Table

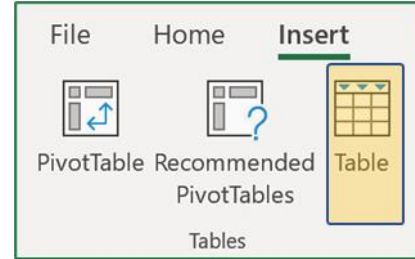




3. Transform the Excel Surface – Tables!

20th Century way of “Range” vs 21st Century way of “Table”
Why double-click to copy formulas?

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

Automatically add a formula to all rows within a table
Benefits of using an Excel table to create a PivotTable.

4. Transform Data Analysis – Pivot Tables (with data in a Table)

The Problem of Pivot Report not taking New Data

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.

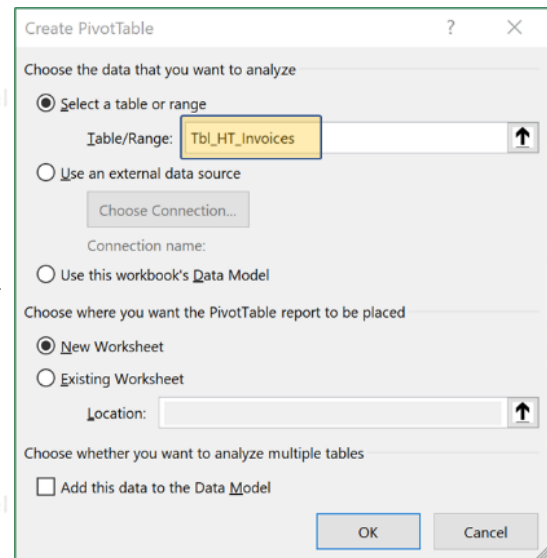
The commonly faced challenges in a Pivot, and solutions for them.
Challenge #1: There are lot of empty cells in the report – how to have “zero” value in all of them.
Challenge #2: The column width keeps changing on Refresh.
Challenge #3: Users can see the data by double clicking on any cell in Pivot Table.

The solutions:

1. The **FIVE** Critical Pivot Table Options
2. Format **Numbers** (Not Cells)
3. Report format: Style and Design Components to Format a Report

The Report: Sum, Count
The Report: Concept of Data Cubes

Show Amount as % Of Total
% Of Grand Total or % of Column Total – which is better?





5. Transform Variance Analysis – calculate AS

Analysis of Variance: Year on Year (YoY)
Analysis of Growth Rate: Year on Year (YoY)

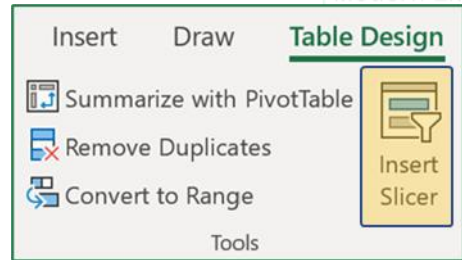
6. Transform Filtering – Slicers

Slicers for Data

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 cannot move them.



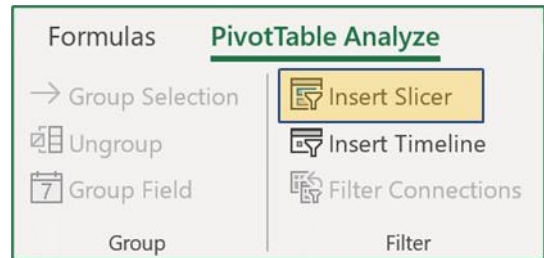
Slicer Settings – best practices

Slicers for Pivot Reports and Pivot Charts

Slicers: One Pivot - Multiple Reports

Super glue your slicers so that even Excel cannot move them
Positioning of Slicer with Pivot Tables

To Print or Not to Print Slicers.
Unlocking Slicers while Protecting a Sheet





7. Transform Formulas & Functions

Transformational Function: =SUBTOTAL()

Use SUBTOTAL(), you will never stop using it.

Transform LOOKUP skills – move to XLOOKUP()

=XLOOKUP()

Lookup LEFT as well as RIGHT! [No need for MATCH() and INDEX()]

Handle NA ERROR with in XLOOKUP()

Default match type is "EXACT". No need for fourth argument – Exact Match / FALSE / 0.

Use wildcards within XLOOKUP().

=VLOOKUP() – the most used and easy to use function

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

1. #N/A Reason: Unwanted Blank Spaces
2. #N/A Reason: Transactional Data is text whereas looked up data is numbers.
3. #N/A Reason: Transactional Data is number whereas looked up data is text
4. #N/A Reason: Spelling Mistakes

VLOOKUP() across two files without "\$A\$1:\$M\$500" range way.

Use Tables

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

Must Know Excel Functions

1. SUBTOTAL()
2. XLOOKUP()
3. VLOOKUP()
4. IFERROR()
5. IF()
6. IFS()
7. AND()
8. OR()
9. TRIM()
10. TEXT()
11. &
12. MONTH()
13. YEAR()
14. DATEVALUE()
15. DATEDIF()
16. VALUE()



Transform Logical Functions – use IFS() instead of Nested IF()

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

=IF(IF(IF)) – Nested IF. Too many brackets! Here is the transformation. Use IFS().

=IFS()



Text Functions

- =TEXT()
- =PROPER()
- =TRIM()
- =CONCATENATE() (or "&")

Date Functions



Is it a Date?

If NOT, convert into Date using =DATEVALUE() function

Extract Month Number with=MONTH() and Year Number with =YEAR() for calculations

Calculate the exact service length in YEARS, MONTHS, DAYS without dividing by 365! Use function DATEDIF().





8. Transform Data cleaning – use POWER QUERY

The powerhouse of Power Pivots and Power BI
Harmonize data
Extract and Transform data
Merge and Append Data from Multiple sources

