

Microsoft Excel Training

Microsoft Excel Advanced (Level 3)

About The Course

This course covers aspects of Microsoft Excel beyond building, summarising and charting everyday workbooks, and deals with advanced calculation, data control, modelling and automation. Instructors teach advanced techniques in areas such as reference and text functions, advanced dynamic array formulas, data validation, what if analysis and Solver, linking and consolidation, protection, advanced PivotTable features and macros.

The emphasis is on building workbooks that are accurate, controlled and repeatable, on modelling outcomes before committing to them, and on producing reporting that can be refreshed rather than rebuilt. Training is delivered through business scenarios with hands-on practical work throughout.

Duration: 1 day**Class size:** 10 students max**Times:** 9:00am to 5:00pm**Price:** *Refer to our website for current course and package pricing***After the course?**

Each student will receive:

- Certificate of completion
- Training manual
- 12 months FREE email support
- FREE class re-sit (if necessary)

Who Should Do This Course?

This course is intended for experienced Microsoft Excel users who wish to extend their knowledge and skills beyond summarising and presenting data. Upon successful completion of the course, students should be able to construct and audit complex formulas, control the way data is entered, model outcomes, extend PivotTables with their own calculations and automate workbook operations.

Prerequisites

Participants should have already completed the Excel Beginner (Level 1) and Excel Intermediate (Level 2) courses before attending this course, or have equivalent skills. Familiarity with cell referencing, Excel Tables, lookup functions, dynamic arrays and PivotTables is assumed.

Learning Outcomes

Upon successful completion of this course, students will be able to:

- Set and personalise Excel options
- Use advanced lookup and reference functions, including INDEX, MATCH, INDIRECT and OFFSET
- Build advanced dynamic array formulas and simplify them with LET
- Manipulate and clean text using text functions
- Use information functions to test and trap conditions
- Apply financial functions to business calculations
- Construct, audit and document complex formulas
- Control data entry using data validation and dependent lists
- Model outcomes using Goal Seek, data tables, Scenario Manager and Solver
- Link and consolidate data across worksheets and workbooks
- Group and outline a worksheet
- Protect cells, worksheets and workbooks
- Extend PivotTables with calculated fields, grouping and custom calculations
- Import data into Excel and export data from Excel
- Record, run, edit and manage macros

Content

Unit 1: Setting Excel Options

- Understanding Excel Options
- Personalising Excel
- Setting Formula Options
- Understanding and Setting Save Options
- Setting the Default File Location
- Setting Advanced Options

Unit 2: Advanced Lookup and Reference Functions

- Reviewing XLOOKUP and XMATCH
- Nesting XLOOKUP for Two Way Lookups
- Using INDEX
- Using MATCH
- Combining INDEX and MATCH
- Performing a Two Way Lookup with INDEX and MATCH
- Understanding Reference Functions
- Using ROW, ROWS, COLUMN and COLUMNS
- Using INDIRECT
- Using OFFSET
- Building Dynamic Ranges with OFFSET and INDIRECT

Unit 3: Advanced Dynamic Array Techniques

- Reviewing Dynamic Array Behaviour and Spill Ranges
- Nesting FILTER, SORT and UNIQUE
- Filtering Against a List of Values
- Filtering with Criteria from Another Table
- Handling Empty Results in Nested Formulas
- Using SEQUENCE to Build Calculated Series
- Simplifying Formulas with the LET Function
- Creating Charts That Update from a Spill Range
- Troubleshooting Spill and Reference Errors

Unit 4: Text Functions

- Understanding Text Functions
- Using the PROPER, UPPER and LOWER Functions
- Joining Text with CONCAT and the Ampersand Operator
- Using the TEXTJOIN Function
- Using the LEFT and RIGHT Functions
- Using the MID Function
- Using the LEN Function
- Using the FIND and SEARCH Functions
- Using the SUBSTITUTE Function
- Using the TRIM and CLEAN Functions
- Using the TEXT Function
- Using the VALUE Function

Unit 5: Information Functions

- Understanding Information Functions
- Using the ISBLANK Function
- Using the ISERROR and ISNA Functions
- Using the ISNUMBER and ISTEXT Functions
- Using the CELL Function

Unit 6: Financial Functions

- Understanding Financial Functions
- Using PMT
- Using FV
- Using PV
- Using NPV
- Using RATE

Unit 7: Complex Formulas

- Scoping a Formula
- Preparing for Complex Formulas
- Creating the Base Formula
- Adding More Operations
- Editing a Complex Formula
- Copying Nested Functions
- Tracing Precedents and Dependents
- Using Evaluate Formula
- Using the Watch Window
- Switching to Manual Recalculation
- Pasting Values from Formulas
- Documenting Formulas

Unit 8: Data Validation

- Understanding Data Validation
- Creating a Number Range Validation
- Creating a Date and Time Validation
- Creating a Text Length Validation
- Creating a Drop Down List
- Creating a Drop Down List from a Table
- Creating Dependent Drop Down Lists
- Building a Drop Down List from a Dynamic Array
- Using a Formula as a Validation Rule
- Creating Input Messages and Error Alerts
- Circling Invalid Data
- Copying and Removing Validation

Unit 9: What If Analysis

- Understanding What If Analysis
- Understanding Goal Seeking
- Using Goal Seek
- Goal Seeking with a Loan Calculation
- Creating a One Variable Data Table
- Creating a Two Variable Data Table
- Understanding Scenarios
- Creating a Scenario
- Displaying and Editing Scenarios
- Creating a Scenario Summary Report
- Understanding Solver
- Installing and Starting Solver
- Setting Solver Constraints
- Running Solver and Generating Reports

Unit 10: Grouping and Outlining

- Understanding Grouping and Outlining
- Creating an Automatic Outline

- Working with an Outline
- Creating a Manual Group
- Grouping by Columns
- Clearing an Outline

Unit 11: Data Linking and Consolidation

- Understanding Data Linking
- Linking Between Worksheets
- Linking Between Workbooks
- Updating Links Between Workbooks
- Managing and Breaking Links
- Using 3D References Across Worksheets
- Understanding Data Consolidation
- Consolidating with Identical Layouts
- Creating a Linked Consolidation
- Consolidating from Different Layouts

Unit 12: Protecting Data

- Understanding Data Protection
- Protecting a Worksheet
- Working with a Protected Worksheet
- Disabling Worksheet Protection
- Providing Restricted Access to Cells
- Protecting Workbook Structure
- Password Protecting a Workbook
- Removing a Password from a Workbook

Unit 13: Advanced PivotTable Features

- Working with PivotTable Grand Totals and Subtotals
- Finding the Percentage of Total
- Finding the Difference From
- Creating Running Totals
- Grouping in PivotTable Reports
- Grouping by Dates and Numeric Ranges
- Creating Calculated Fields
- Creating Calculated Items
- Sorting in a PivotTable
- Working with PivotTable Options
- Using GETPIVOTDATA

Unit 14: Importing and Exporting Data

- Understanding Data Importing
- Working with Text File Formats
- Importing Comma Delimited Text
- Importing Tab and Space Delimited Text
- Splitting Data with Text to Columns
- Introducing Get and Transform
- Refreshing and Unlinking Connections
- Exporting Data as Text
- Exporting to Microsoft Word
- Exporting to PDF

Unit 15: Recorded Macros

- Understanding Excel Macros
- Setting Macro Security

- Saving a Document as Macro Enabled
- Recording a Simple Macro
- Running a Recorded Macro
- Understanding Relative Cell References
- Running a Macro with Relative References
- Viewing and Editing a Macro
- Assigning a Macro to the Ribbon or Toolbar
- Assigning a Keyboard Shortcut to a Macro
- Copying and Deleting Macros

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