

**Excel Advanced – 2 days**



**This course outline is used to cover topics taught in all versions of Excel. The names and exact details may vary slightly depending on the version you are using**

**Course Objectives**

- create and use defined names in a workbook
- work with logical function in Excel
- use a variety of data validation techniques
- use a range of lookup and reference functions
- create summaries in your spreadsheets using subtotals
- understand and create simple PivotTables
- construct and operate PivotTables using some of the more advanced techniques
- perform a variety of analytical tasks using PowerPivot
- use the Data Consolidation feature to combine data from several workbooks into one
- create and work with scenarios and the Scenario Manager
- use Solver to solve more complex and intricate problems
- import data into Excel and export data from Excel
- create and use a range of controls in a worksheet
- create recorded macros in Excel
- import data into Excel and export data from **Excel**

**Exercises**

This course is instructor led, involving the utilisation of examples and exercises in a workshop environment.

**Prerequisites**

It is recommended that students have experience with the fundamental use and features of Microsoft Excel including the ability to:

- Create formulae and basic functions
- Use Absolute Cell references
- Edit data using formatting and layout techniques including Charting
- Work with database tools, including database filtering and functions

If you have not attended our Essential or Intermediate training courses we do send out an exercise once you have booked this course. This is just to double-check that you are familiar with all the topics covered previously.

**Defined Names**

- Understanding Defined Names
- Defining Names From Worksheet Labels
- Using Names in Typed Formulas
- Applying Names to Existing Formulas
- Creating Names Using the Name Box
- Using Names to Select Ranges
- Pasting Defined Names Into Formulas
- Defining Names for Constant Values
- Creating Names From a Selection
- Scoping Names to a Worksheet
- Using the Name Manager
- Documenting Defined Names

**Logical Functions**

- Understanding Logical Functions
- Using IF With Text
- Using IF With Numbers
- Nesting IF Functions
- Using IFERROR
- Using TRUE and FALSE
- Using AND
- Using OR
- Using NOT

**PivotTables**

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#### Validating Data

- Understanding Data Validation
- Creating a Number Range Validation
- Testing a Validation
- Creating an Input Message
- Creating an Error Message
- Creating a Drop Down List
- Using Formulas as Validation Criteria
- Circling Invalid Data
- Removing Invalid Circles
- Copying Validation Settings

#### Lookup Functions

- Understanding Data Lookup Functions
- Using CHOOSE
- Using VLOOKUP
- Using VLOOKUP for Exact Matches
- Using HLOOKUP
- Using INDEX
- Using Match
- Understanding Reference Functions
- Using ROW and ROWS
- Using COLUMN and COLUMNS
- Using ADDRESS
- Using INDIRECT
- Using OFFSET

#### Summarising and Subtotalling

- Creating Subtotals
- Using a Subtotalled Worksheet
- Creating Nested Subtotals
- Copying Subtotals
- Using Subtotals With AutoFilter
- Creating Relative Names for Subtotals
- Using Relative Names for Subtotals

- Understanding Pivot Tables
- Recommended Pivot Tables
- Creating Your Own PivotTable
- Defining the PivotTable Structure
- Filtering a PivotTable
- Clearing a Report Filter
- Switching PivotTable Fields
- Formatting a PivotTable
- Understanding Slicers
- Creating Slicers
- Inserting a Timeline Filter

#### PivotTable Features

- Using Compound Fields
- Counting in a PivotTable
- Formatting PivotTable Values
- Working With PivotTable Grand Totals
- Working With PivotTable Subtotals
- Finding the Percentage of Total
- Finding the Difference From
- Grouping in PivotTable Reports
- Creating Running Totals
- Creating Calculated Fields
- Providing Custom Names
- Creating Calculated Items
- PivotTable Options
- Sorting in a PivotTable
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#### Controls

- Understanding Types of Controls
- Understanding How Controls Work
- Preparing a Worksheet for Controls
- Adding a Combo Box Control
- Changing Control Properties
- Using the Cell Link to Display the Selection
- Adding a List Box Control
- Adding a Scroll Bar Control
- Adding a Spin Button Control
- Adding Option Button Controls
- Adding a Group Box Control
- Adding a Check Box Control
- Protecting a Worksheet With Controls

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**Data Consolidation**

- Understanding Data Consolidation
- Consolidating With Identical Layouts
- Creating a Linked Consolidation
- Consolidating From Different Layouts
- Consolidating Data Using the SUM Function

**Scenarios**

- Understanding Scenarios
- Creating a Default Scenario
- Creating Scenarios
- Using Names in Scenarios
- Displaying Scenarios
- Creating a Scenario Summary Report
- Merging Scenarios

**Solver**

- Understanding How Solver Works
- Installing the Solver Add
- Setting Solver Parameters
- Adding Solver Constraints
- Performing the Solver Operation
- Running Solver Reports

**Importing and Exporting**

- Understanding Data Importing
- Importing From an Earlier Version
- Understanding Text File Formats
- Importing Tab Delimited Text
- Importing Comma Delimited Text
- Importing Space Delimited Text
- Importing Access Data
- Working With Connected Data
- Unlinking Connections
- Exporting to Microsoft Word
- Exporting Data as Text
- Inserting a Picture
- Modifying an Inserted Picture

**Recorded Macros**

- Understanding Excel Macros
- Setting Macro Security
- Saving a Document as Macro Enabled
- Recording a Simple Macro
- Running a Recorded Macro
- Relative Cell References
- Running a Macro With Relative References
- Viewing a Macro
- Editing a Macro
- Assigning a Macro to the Toolbar
- Running a Macro From the Toolbar
- Assigning a Macro to the Ribbon
- Assigning a Keyboard Shortcut to a Macro
- Deleting a Macro
- Copying a Macro