

Microsoft Excel: Intermediate / Advanced

Microsoft Excel Training Series | Level 2

Course Details

Duration: 2 days

Microsoft® Excel® Versions: 2010 | 2013 | 2016 | 2019 | 365 (Windows)

Delivery Methods: Instructor-led classroom (ILC) |

Course Overview

This Microsoft Excel course is designed for users who want to move to the next level and focus on core competencies in Excel. Students will learn shortcuts to enter common functions as well as Excel key concepts and then move on to powerful conditional functions and tools including IF, SUMIF, COUNTIF, VLOOKUP and conditional formatting. Links will be created and managed between worksheets, workbooks and other programs. Students will review strategies to manage list or database data using filtering, sorting, subtotalling and validations. Using Excel data, charts will be generated and formatted and then a chart template will be created to save time. Students will also create pivot tables to summarize list or database data and will create simple macros to automate repetitive tasks. During this hands-on course, students will practice their skills and the instructor will include numerous tips, tricks and shortcuts. Each student will also receive a full course manual.

Prerequisite: Microsoft Excel: Introduction or equivalent knowledge and skills.

Course Topics

Working Effectively in the Microsoft Excel Environment

- Adding buttons to customize the Quick Access Toolbar (QAT)
- Controlling key Excel options
- Navigating and selecting cells using keyboard shortcuts
- Automating formatting using themes

Mastering Key Excel Concepts

- Creating formulas using absolute, relative and mixed referencing
- Naming cells and cell ranges
- Using names in formulas
- Editing named cells and ranges using the Name Manager

Tips and Techniques for Entering Core Excel Functions

- Using different strategies to quickly enter core Excel functions including SUM, AVERAGE, MIN and MAX
- Counting cells containing numeric or text values
- Inserting the current static date or dynamic date
- Extracting date information from cells containing dates using core date functions
- Using keyboard shortcuts to insert and display formulas
- Combining text strings in a formula

Using IF and VLOOKUP Functions to Display Conditional Results

- Using the powerful IF function to output conditional results
- Creating nested IF statements
- Creating formulas using SUMIF and COUNTIF
- Using the VLOOKUP function to look up data vertically in a list or database
- Dealing with VLOOKUP errors

Applying Conditional Formatting

- Highlighting cells using built-in conditional formats
- Clearing conditional formatting
- Editing rules for icon sets

- Writing formulas in conditional formatting rules
- Highlighting entire records using conditional formatting

Protecting and Formatting Worksheets and Workbooks

- Protecting worksheets and workbooks
- Using cell styles and themes to speed up formatting in multiple worksheets

Linking Worksheets and Workbooks

- Using link cells in formulas to link worksheets and workbooks
- Managing and updating links between workbooks
- Importing linked and unlinked Excel data into Microsoft Word

Summarizing Cells or Ranges from Multiple Sheets

- Understanding 3D references
- Inserting formulas that extract totals from multiple sheets using 3D references
- Considerations when inserting, moving and deleting sheets

Manipulating and Extracting List or Database Data

- Identifying the parts of an Excel list or database
- Best practices for setting up lists or databases correctly in Excel
- Inserting records on a worksheet or adding records using a data form
- Sorting records using the Sort feature with multiple sort keys
- Using a custom sort to sort records
- Inserting subtotals using the Subtotal feature
- Applying filters with multiple criteria
- Using custom criteria when filtering text, number and date fields
- Setting up advanced filters for more complex filtering such as overcoming the two criteria custom filter maximum

Converting Data Sets to Tables

- Why you should be using Excel tables
- Converting lists to tables in 3 different ways
- Creating formulas in tables
- Displaying totals for filtered records

- Converting tables back to normal ranges

Reducing Errors with Validations

- Applying validations to ensure users enter the correct type of data in cells
- Creating custom dialogs if users attempt to enter incorrect data
- Creating drop-down lists to make data entry easier and more accurate

Visualizing Data using Charts and Sparklines

- Inserting charts on a spreadsheet or on a new Excel sheet
- Applying chart formats to improve the appearance of your charts
- Changing the chart type
- Applying different types of formatting using various tips and tricks
- Saving time by creating a chart template
- Displaying trends using miniature charts in cells called Sparklines (in Excel 2010 and later)

Summarizing Data using Pivot Tables

- Creating pivot tables to summarize Excel list or database data
- Rearranging fields in a pivot table
- Applying formatting to pivot tables and fields
- Filtering a pivot table
- Creating a pivot chart
- Updating or refreshing a pivot table
- Applying filtering using Excel's slicers (in Excel 2010 and later)
- Adding a pivot table button to the Quick Access Toolbar