Working With EXCEL

ADVANCED LEVEL 3

WHO SHOULD ATTEND

This course is designed for anyone who has completed our Microsoft Excel - Intermediate course and is looking to gain a higher proficiency with the tool. This full day workshop focuses on the foundations of working with Pivot Tables and basic Macros. If you work with Excel extensively, this course will benefit you.

This course will teach participants how to better collaborate with colleagues, automate complex or repetitive tasks, and use conditional logic to construct and apply elaborate formulas and functions that will put the full power of Excel right at your fingertips. Upon completing this course, individuals learn about most of the Microsoft Excel functions and can put it to work.

Prerequisite:
- Participants should have successfully completed Microsoft Excel Level 2 course.

Also includes:
- Our pre-workshop Discovery call where we learn how your group currently uses the tool and how we can customize the learning to meet your specific needs
- virtual learning guide
- A Free Follow-up 30-minute Coaching Session
- Lifetime Support with the learning

Course Objectives

By the end of this workshop, participants should be better able to:

- Analyze data with Pivot Tables, Slicers and PivotCharts
- Troubleshoot Pivot Table Report Compatibility Issues
- Automate Worksheet functionally including Macros
- Analyze and present data with Sparklines, Scenarios and What-If analyses
- Work with multiple workbooks
- Export Excel data

Format:
- 1-day instructor-led session or two 3-hour web- based live online classroom sessions
- Optional follow up group Coaching Session to reinforce learning
- Customized options for shorter in-house training are also available

Required Software:
- Microsoft Excel 2016/2019 or Microsoft Office 365

COURSE SYNOPSIS

Unit 1: Automating Worksheet Functionality
This unit teaches you how to
- Protect your data (new)
- Update Workbook Properties
- Introduction to creating and editing a Macro
- Add Data Validation Criteria
- Working with lookup formulas (VLOOKUP, HLOOKUP, XLOOKUP)

Unit 2: Analyzing and Presenting Data
This unit teaches you how to
- Create Sparklines
- Create Scenarios
- Perform a What-If Analysis

Unit 3: Working with Multiple Workbooks
This unit teaches you how to
- Consolidate Data
- Link Cells in Different Workbooks
- Merge Workbooks

Unit 4: Introduction to analyzing Data with Pivot Tables, Slicers, and Pivot Charts
This unit teaches you how to
- Create a PivotTable
- Filter Data by Using Slicers
- Analyze Data with Pivot Charts

Unit 5: Exporting Excel Data
This unit teaches you how to
- Export Excel Data
- Import a Delimited Text File

Unit 6: Enhancing Workbooks
This unit teaches you how to
- Customize Workbooks
- Manage Themes
- Create and Use Templates

Learning Microsoft Excel ⊘

The Working with Microsoft Excel – Level 3 workshop is targeted towards individuals familiar with Excel who wish to expand their knowledge around advanced data analysis tools as well as learn more about Excel's various time-saving features. This course includes creating and using a pivot table to extract different information from one data sample. This course will give you the skills to use a Pivot Table to produce meaningful analysis and charts from a simple table of information.

PRIORITY

LEARNING & DEVELOPMENT