

## Excel Intermediate to Advanced Topics:

Typically, you could get through 8 to 12 topics in a day depending on the level and complexity of the topic (topics shown in **bold**). Look at some of our other 'bespoke' courses to get an idea as to what can be covered in a day/half a day.

Pre-requisites for this level of course require that attendees have attended the Introductory course or they are familiar with the basics of Excel; including how to use Copy and Paste, file basics, use of =SUM and using absolute cell references.

### **Working with Large Worksheets:**

- Navigation shortcut keys
- Changing Zoom levels
- Freeze Panes
- Split Window
- Hiding Columns & Rows
- Printing Large Worksheets
- Setting Page breaks with Page Break view
- Creating Headers & Footers
- Setting Print Titles
- Scaling data
- Setting the Print area
- Printing multiple sheets

### **Advanced Formatting:**

- Using the Format Painter to copy formats
- Using built-in Styles
- Editing Styles
- Creating a new Style
- Applying a 'Theme'
- Editing Themes
- Saving a new Theme

### **Sorting and Filtering Lists:**

- Setting up a List
- Editing data in a list
- Sorting alphabetically/numerically
- Filtering data using Autofilter

### **Summarising and Subtotals:**

- Creating subtotals
- Collapsing & expanding subtotals
- Creating nested subtotals
- Copying subtotals
- Printing & removing subtotals

### **Grouping and Outlining Data:**

- Understanding grouping & outlining
- Creating an automatic outline
- Collapsing & expanding outlines
- Creating manual groups
- Grouping columns & rows
- Removing grouping
- Copying 'visible' data only

### **Data Consolidation:**

- Understanding data consolidation
- Consolidating with identical layouts
- Creating linked consolidation
- Consolidating from different layouts
- Consolidating data using =SUM

### **Tables:**

- Advantages of using Tables
- Table layout
- Inserting & formatting a Table
- Table options
- Enabling the 'Total' row
- Sorting data in a Table
- Custom Sorting
- Using Autofilter to filter data
- Filtering using Slicers
- Removing Duplicates
- Turning the Table back to a 'Range'

### **Range & Label Names:**

- Uses of Range Names
- Creating a Range Name
- Range Name rules
- Using Names to navigate
- Using Names in formulas
- Using the Name Manager
- Range Name labels
- Applying Names retrospectively
- Using Names for Constants
- Editing & Deleting Range Names
- Creating a Name list

### **Hyperlinks:**

- Linking to separate worksheets/Range Names
- Text and picture Hyperlinks
- Editing Hyperlinks & 'ScreenTips'
- Changing the Hyperlink style
- Linking to other workbooks/documents
- Linking to websites/email addresses
- Deleting Hyperlinks

### **Flash Fill:**

- Enabling Flash Fill
- Breaking down text
- Breaking down numbers
- More complicated Flash Fill formats
- Cancelling Flash Fill

### **Text Functions:**

- Text functions to change case
- Text functions to extract data
- Text functions to join data
- Text functions to add data

### **Logical & Conditional Functions:**

- Understanding Logical Functions
- Using =IF with text and values
- Nested IF Functions
- SUMIF, COUNTIF & AVERAGEIF
- Using AND, OR and NOT
- Using IFERROR Function
- SUMIFS

### **Lookup Formulas:**

- Understanding Lookup Formulas
- Using VLOOKUP for exact matches
- Using VLOOKUP for closest match
- Using HLOOKUP

### **Data Validation:**

- Understanding data validation
- Validating a range of numbers
- Creating an Input message
- Creating a bespoke error message
- Drop-down lists
- Using formulas in data-validation
- Circling invalid data
- Identifying data validation

### **Basic Charts:**

- Chart sheets vs Chart objects
- Creating a 'recommended' Chart
- Resizing and moving Charts
- Creating a Chart Sheet
- Creating a Chart Object
- Formatting Charts & Chart Properties
- Printing Charts

### **Advanced Charts:**

- Filtering Chart data
- Mixed Charts
- Adding Trend lines
- Adding a 2<sup>nd</sup> y axis
- Map charts & other chart types

### **PivotTables & PivotCharts:**

- Understanding PivotTables
- Formatting source data as a Table
- Recommended PivotTables
- Creating a PivotTable
- Adding fields & filtering data
- Switching fields
- Refreshing the PivotTable
- Sorting & grouping Data
- Using Slicers to filter data
- Creating a PivotChart from a PivotTable

### **Advanced PivotTables & PivotCharts:**

- Grouping text, dates & numbers
- Collapsing/expanding fields/groups
- Formatting PivotTable data
- Change summary type
- Show totals as %
- Creating running Totals
- Creating calculated fields
- Creating calculated Items
- Using Timelines
- Creating PivotChart Objects & Sheets
- Moving PivotCharts
- Sharing Slicers

### **Protecting Data:**

- Cell & worksheet protection
- Locked & hidden cells
- Protecting workbooks
- Disabling protection
- File protection
- Read Only passwords

### **Templates:**

- Using the built-in templates
- Saving a new template
- Template locations
- Using templates

### **Documenting/Auditing Data:**

- Using Cell Comments
- Showing & selecting formulas
- Tracing cells
- The 'Watch' window
- Error Checking
- Evaluate Formulas

### **Calculating with Date and Time:**

- Understanding date and time formats
- Changing the date/time format
- Simple date/time formulas
- =TODAY() & =NOW() functions
- Other date/time formulas

### **What-if Analysis:**

- Using Goal Seek to reach a target value
- Using the Solver tool;
- Enabling the Solver 'add-in'
- Identifying target cells
- Identifying the 'changing' cells
- Introducing & editing Constraints
- Solver Reports

### **What-if Analysis – Data Tables:**

- Using a simple what-if model
- Creating a one-variable data table
- Creating a two-variable data table
- Using conditional formatting on a data table

### **What-if Analysis – Scenarios:**

- Understanding Scenarios
- Creating a default Scenario
- Adding additional Scenarios
- Displaying & editing Scenarios
- Using Names in Scenarios
- Creating a Scenario summary
- Merging Scenarios

### **Graphics:**

- Inserting & modifying pictures
- Inserting Shapes & Icons
- Using SmartArt diagrams

### **Conditional Formatting:**

- Understanding Conditional Formatting
- Trend-based and Value-based formatting
- Data bars, icon sets and colour scales
- Building value-based rules
- Editing Conditional Formatting
- Top/Bottom Rules
- Showing Duplicates
- Identifying cells with Conditional Formatting
- Clearing and deleting Conditional Formatting rules
- Creating 'Sparklines'
- Formatting, editing and deleting 'Sparklines'

### **Importing and Exporting Data:**

Importing and converting earlier versions  
 Importing text files  
 Text file formats & delimited files  
 Text to columns conversion  
 Importing Access data  
 Using 'connections'  
 Exporting to MS Word  
 Inserting pictures  
 Linking data between applications

### **Working with Multiple Worksheets**

Duplicating Sheets  
 Moving, deleting & hiding sheets  
 Grouping & formatting sheets  
 Displaying sheets side-by-side  
 Copying sheets to other workbooks

### **Linking Multiple Sheets & Workbooks:**

Understanding data linking  
 Linking between worksheets  
 Linking between workbooks  
 Updating links

### **Sharing Workbooks:**

Opening shared Workbooks  
 Enabling 'Track Changes'  
 Accepting or Rejecting changes  
 Disabling Track Changes  
 Adding Worksheet Comments  
 Editing Worksheet Comments  
 Deleting Comments

### **Form Controls & Protecting Data:**

Control types  
 Formatting the worksheet for Controls  
 Label Form Control  
 Option button & Check box Controls  
 Spin button and Scrollbar Controls  
 Combo box and List Box Controls  
 Setting Control properties  
 Protecting a Worksheet with Controls

### **Advanced Filters:**

Understanding Advanced Filtering  
 Extracting records with Advanced Filter  
 Using Formulas in Criteria  
 Using Database Functions  
 DSUM, DMIN, DMAX & DCOUNT Functions

### **Recorded Macros:**

Understanding Recorded Macros  
 Setting Macro Security levels  
 Recording a Workbook Macro  
 Saving a Macro-enabled document  
 Recording a global Macro  
 Relative vs Absolute cell references  
 Viewing the Macro Code  
 Assigning a Macro to a Shortcut key  
 Assigning a Macro to the Quick Access toolbar  
 Deleting a Macro  
 Saving the Personal Macro Workbook