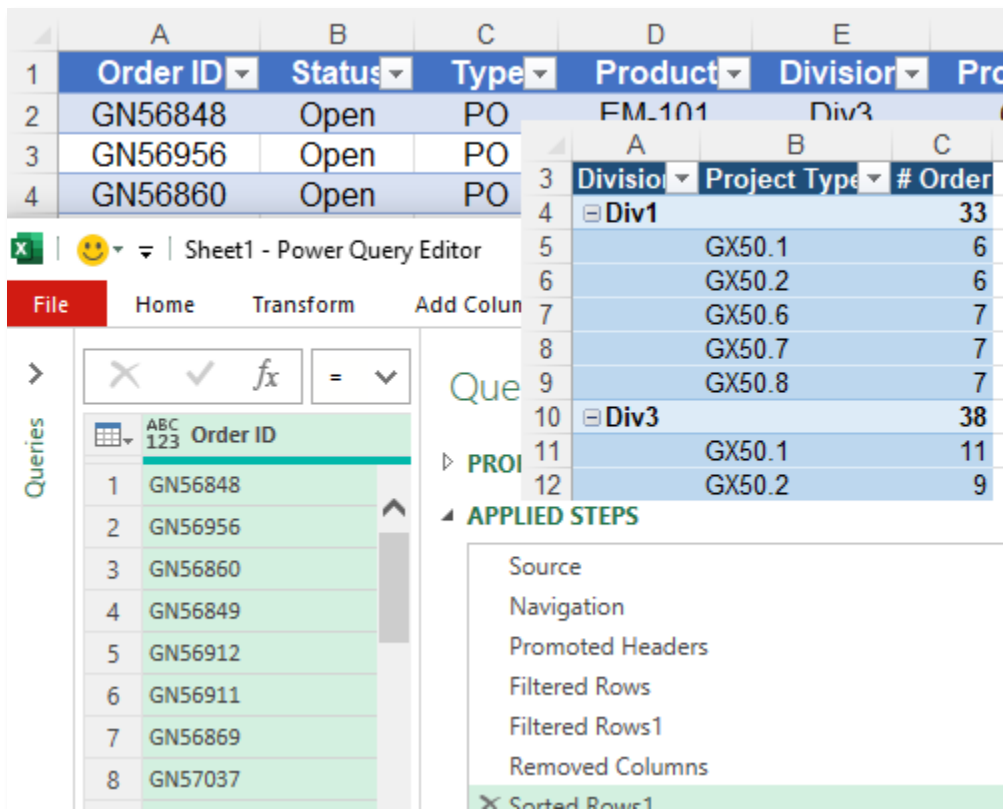


For a video presentation of our class, please visit

<https://emagenit.com/advancedexcel.htm> >

Questions? 1.805.498.7162

Advanced Excel for Business and Industry



Learn about Excel's advanced querying, formula, and data processing capabilities and use them to build automated calculation and reporting tools.

How our class can help you.

Our 1-day class shows you the key Excel elements you need to start building automated analysis and reporting tools.

It covers essential topics like table construction; key analysis formulas / functions; and report filters. Our class also covers unique topics like using advanced logic to color cells; merging text and date time values; and using array formulas to analyze complex datasets.

We'll also show you how to combine Power Query, PivotTables, Pivot Charts, Excel tables, and formulas to build automated reports that automatically filter, summarize, and update their data from changing source files.

Join us and our class will show you how to combine all these Excel elements and more to build the flexible analysis tools that make your job easier.

Key Excel topics covered in class.

- Using relative, mixed, and absolute references to perform various formula fills
- How to manage and use cell / range names to rapidly build analysis formulas and link data
- Using Excel tables, slicers, structured references, and charts to quickly build adaptive analysis tools
- Creating worksheet UIs to control your Excel tools using Data Validation, ActiveX Controls, and shapes
- Building adaptive formulas that react to changing logic and data using names, structured references, concatenation, and functions
- Using Power Query to rapidly import, merge, and shape data from workbooks, text files, and databases
- Dynamically changing cell format and placing bars, arrows, circles... in cells using Conditional Formatting and logic
- Creating advanced logic for your formulas and Conditional Formatting
- Using array formulas to analyze complex worksheet data sets and perform multi-condition lookups
- Using slicers, timelines, PivotTables, Pivot Charts, and Excel tables to construct adaptive data reports
- How to link Excel with Word and PowerPoint to create dynamic reports

Excel skills needed for our class.

Select this Excel training if you or your group have:

- Formatted a worksheet using colors, fonts, borders, alignments, number formats...
- Typed in formulas and used worksheet functions like VLOOKUP, IF, MAX, MIN, COUNTIF...
- Built a worksheet table before and performed drag and fill operations on formulas
- Used logic before in formulas and know the relational operators <, >, <=, >=, <>, =
- Used basic Excel data tools before like Sort and AutoFilter
- Built and formatted charts
- Built basic PivotTables and Pivot Charts

Who should attend?

- All disciplines welcome with class problems determined by those in attendance.

How we run the class.

We focus our training on what our customers need. When training begins, we analyze those needs and shift our outline appropriately. We will stress topics or add topics that our customers want. No two training sessions are ever the same with EMAGENIT.

Detailed class syllabus.

Advanced Formula Design, Names, and Linking Data

- Using operators, relative, mixed, and absolute cell references to build analysis formulas
- Building formulas that drag and fill horizontally and vertically using relative and mixed references
- How does Excel really store numbers, text, and dates and how they affect your formulas
- Using range and cell names in your formulas to easily track data
- Passing data between workbooks and worksheets using cell references and names
- Using the relational operators: <, >, <=, >=, <>, = to build basic logic formulas

- How to use string concatenation to merge worksheet text data and date time values

Using Excel Tables to Quickly Build Automated Analysis Tools

- Using an Excel table's quick analysis tools and slicers to report table data
- How to create formulas in Excel tables that reference other worksheet and Excel tables
- Using structured references to build formulas that adapt to changing data size and arrangement
- Using structured references to lock onto part of an Excel table, great for lookups
- Piggy backing names on top of Excel tables so they self-adjust, alternate to structured references
- Designing Excel tables and Slicers to quickly control charts in a dashboard

Creating Worksheet UIs from Data Validation, ActiveX Controls, and Shapes

- Using Data Validation to create cell drop down lists and control number, date, and text entry in a cell
- Creating adjustable Data Validation cell drop lists using names
- What is the difference between ActiveX controls and Form controls?
- Creating and using check box, spinner, scrollbar... controls to control user entry on the worksheet
- Dynamically displaying cell values in shapes and creating linked pictures that update

Building Adaptive Data Analysis Formulas that Lookup, Sum, or Count

- How adaptive formulas will help you get rid of duplicated worksheets, extra columns, extra formulas...
- Review of nesting formulas and functions to create self-adjusting formulas
- What is string concatenation and how is it used to quickly build self-adjusting formulas?
- Using concatenation to build names, cell references, and logic from user selections and data

- Using concatenation and text functions to build adaptive lookup values for VLOOKUP, XLOOKUP...
- Creating adaptive logic for SUMIFS, COUNTIFS... from selections, data, and concatenation; great for fill downs with changing logic
- Using INDIRECT and OFFSET to automatically toggle between tables, columns, cells... in your formulas and functions

Using Power Query to Rapidly Access, Merge, and Shape Your Worksheet Data

- What is Power Query and how is it used to import and rapidly shape (filter, parse, clean, trim, merge...) worksheet data?
- How to refresh a Power Query table at the click of a button and update its source
- Using Power Query to link with and process data in a workbook, text file, and database
- Performing various Power Query shaping tasks like merging data, filtering data, replacing characters, sorting, splitting dates, cleaning text...
- Design strategies for using Power Query to filter data through a series of tables so the final table can be used in calculations, charts, reports...
- Performing formula calculations inside a Power Query table

Creating Advanced Logic Formulas and Using Conditional Formatting to Flag Data

- Logic review including relational operators: <, >, <=, >=, <>, = and using the IF, AND, OR... logical worksheet functions
- Creating logical formulas using the IF and IS functions that determine if cells are blank, contain numbers, contain text, have errors...
- Using the IFS function to evaluate an IF, ELSEIF, ELSEIF... type of logic decision
- Developing advanced logical tests for your IF functions that analyze parts of text, parts of dates, test for data existence... in worksheet data
- How to use Conditional Formatting and logic to automatically flag worksheet data with colors, icons, bars....
- How to create a Conditional Formatting rule that formats a cell based on value or formula
- Modifying and deleting Conditional Formatting rules

Using Array Formulas to Process Complex Worksheet Data Sets

- What is an array formula and how are they used to analyze worksheet data?
- How to tell when a worksheet function or formula can take an array and produce an array
- How simple array formulas can be used to pre-process data for use in functions like VLOOKUP, MATCH, SUM, MAX,...
- Creating array formulas that process complex logic data sets using the IF worksheet function
- Using array formulas to clean, replace, merge, and split worksheet data while simultaneously processing it
- Creating array formulas that perform multi-condition lookups and return entire rows and columns from tables

Creating Advanced PivotTables and Pivot Charts That Summarize and View Your Data

- Creating a connection to a database, text file, Excel table... for use in a PivotTable / Pivot Chart
- Creating running totals, % OF, differences, ranks... in your PivotTables
- Creating formulas that reference PivotTable data including how to use the GETPIVOTDATA function
- Creating and using relationships from Excel tables and external data sources to build PivotTables and Pivot Charts
- Using slicers, timelines, PivotTables, and Pivot Charts to rapidly construct dashboards
- Getting creative with PivotTables and using them for other things besides summarizing data

Linking Excel with Word / PowerPoint to Quickly Build Reports

- Using Excel with Word or PowerPoint to make dynamic reporting tools
- Linking cell values, ranges, and charts to a Word document
- Linking cell values, ranges, and charts to a PowerPoint presentation
- How to save your linked files, open them, and break those links when emailing