



An Expert Knowledge course **Working with data lists in** **Microsoft® Excel**

Level: Stage 3

About this course

This course has been designed to introduce the Microsoft® Excel features used to save time formatting, referencing and reporting on large data lists. The aim is to ensure attendees gain a good grounding in the more advanced data manipulation tools.

Who should attend?

This course is aimed at people who work with large data lists – usually extracted from in-house databases and then imported into Excel.

Learning objectives

By the end of this course, participants should be able to confidently:

- ✓ Give a range a name so as to quickly identify it in formulas and functions
- ✓ Import data files into Excel, including linking to external files
- ✓ Use data cleaning techniques to manipulate data formats
- ✓ Manipulate and extract data using Advanced Filter commands and the Table feature
- ✓ Extract and match data using Lookup and Reference functions
- ✓ Change data formats depending on cell content
- ✓ Collapse and expand data tables using Group and Outline and Subtotals
- ✓ Create powerful reports using Pivot Tables and Pivot Charts
- ✓ Chart data using advanced techniques

Learning method

This course is designed to be instructor led. Instruction follows a “hands-on” approach. Each delegate will require a PC with Microsoft® Excel software installed. The course can be complemented with user reference manuals (optional). Use of a whiteboard and data projector would be beneficial.

Course pre-requisites

This course is designed for users who are proficient at using the Microsoft® Windows environment, a mouse and keyboard and who already have the essential skills needed to create, format, edit, save and print an Excel workbook. This includes the ability to create formulas and functions.

Course duration

Course delivery consists of 8 hours hands-on tuition. This can be delivered in one session or 2 x 4hr sessions. Please note the duration is set for a maximum of 8 persons. If you are thinking of running this course for a smaller or larger group please contact us for confirmation of the required duration.

Skill check

The instructor will provide practical exercises and practice files. Delegates can request assistance when working through the exercises. The aim is to confirm a skill has been developed to ensure the learning objectives have been met, therefore, where ever possible delegates are encouraged to repeat the exercise unassisted.

Safety check

The instructor will explain the benefit of good posture with recommended safety checks to be made during the session and when working on a PC in general.

Course content

Topics covered in this course include the following:

Naming ranges

- Creating and working with named ranges
- Use a range name in a formula or function, e.g. =SUM(Sales_Budgets)
- Quickly go to named ranges
- Delete a range name

Importing a file into Excel

- Importing and saving a delimited file as an Excel file
- Creating a link to an external data source
- Placing delimited text into columns
- Removing unwanted spaces (TRIM)
- Changing numbers formatted as text back to numbers

Filtering data in a list

- Copying filtered data using complex criteria
- Creating SUBTOTALS using Tables
- Using the VLOOKUP, MATCH and INDEX functions to return values from a data list

Identifying data with Conditional formats

- Apply a conditional format to a range
- Managing Rules
- Creating a new Rule
- Clear conditional formatting

Customise data formats

- Create customised formats
- Apply and copy customised formats

Group rows and Columns

- Group and Outline automatically
- Creating a manual outline
- Inserting and removing Subtotals

Pivot Tables

- Consolidating data using Pivot Tables
- Changing the formatting of a Pivot Table Report
- Filtering data
- Creating calculations within the Pivot Table area
- Grouping data by date
- Creating Pivot Charts
- Understanding the relationship between Pivot Tables and Charts

Advanced Charting

- Charting non-adjacent data
- Including additional data
- Creating line-column combination chart
- Using a secondary axis
- Add a trend line