

# Excel Managing Data



## Overview:

This course is designed to enable basic users of Excel to enhance their knowledge to maintain lists of data in Excel using tables, sorting and filtering data, adding subtotals, and eliminating duplicate data and analysing the data.

## Prerequisites:

Participants must have basic knowledge of entering data formatting and simple formulas.

## Who should attend:

This course is designed for people who have a basic knowledge of Excel and wish to use more advanced features of Excel

## Benefits:

Learn to use Excel to:

- calculate with date and times for scheduling
- perform statistical analysis
- calculate financial data such as payments, or investment returns
- manage lists of data with various filters
- work with large workbooks


## Learning Outcomes:

- Understand which functions to use for a particular need
- Manage large, multiple sheet workbooks with confidence
- Create formulas across multiple sheets
- Use Range Names to navigate a workbook and improve the 'readability' of functions

## Version(s):

2013, 2016, 2019, 365



## 1 day



 440.00


## Course times:

9:00am-4:30pm

## Delivery Options

 Public Schedule  Live Online

 Group Training  In-house

 **Certificate upon Completion**  
Non-accredited course



## To book this course:

Call: **1300-2GO-CTS**

Web: [www.ctstraining.com.au](http://www.ctstraining.com.au)

Email: [info@ctstraining.com.au](mailto:info@ctstraining.com.au)



# Content:

## Managing data with Tables

- Setting up an Excel Table
- Adding Rows
- Using Dynamic Headings
- Table Tools and Formats
- Using the Table Style Gallery
- Deleting Table Records
- Find Duplicates
- Adding a Total Row

## Sort and Filter

- Using the Filter
- Sorting Data
- Sort or Filter by Colour

## Functions

- Function techniques
- Date & Time Functions
  - NOW, TODAY, YEAR, MONTH, DATE,
  - WORKDAY, WEEKDAY
- Statistical Functions
- Count Functions
  - COUNT, COUNTA
- Financial Functions
  - PMT, FV
- Logical Functions
  - IF, SUMIF, SUMIFS

## Absolute References

- Understand how to use Relative vs. Absolute references
- Use Absolute References in Formulas
- Creating and Using Mixed References

## Range Names

- Navigating with Range Names
- Creating Names with the Name Box
- Managing Names
- Applying Names to Formulas
- Scoping Names

## Data Validation

- Restricting cells entries with lists

## Paste Special

- Copying Formats between Worksheets
- Copying Values between Worksheets
- Copying Formulas between Worksheets
- Copying Column Widths
- Transposing Data

## Linking

- Copying and Pasting Links
- Entering Linked Formulas
- Updating and Managing Links
- Creating and Using Hyperlinks

## Working with Large Worksheets

- Changing Worksheet Views
  - Viewing/Hiding Ruler, Gridlines, Formula Bar
  - Splitting Windows
  - Freezing Panes
  - Using an Outline
  - Clearing an Outline
- Using Auto Outline

## Managing Multiple Worksheets

- Arranging windows and workbooks
- Protecting formulas
- Protecting worksheet structure
- Protecting Windows



# Excel Presenting Data



## Overview:

This course is designed for people who have sound knowledge of Excel, and who want to improve the presentation of data in Excel. By the completion of this course participants will have a thorough knowledge of Excel Tables and Charts

## Prerequisites:

Participants must have basic knowledge of entering data formatting and simple formulas.

## Who should attend:

This course is designed for users of Excel who wish to design Excel

## Benefits:

- Automatically display alerts for KPIs
- Produce schedules and activity charts
- Manage data using the Excel Table feature
- Simplify complex formulas using Tables
- Learn quick efficient techniques for charting
- Develop simple interactive charts


## Learning Outcomes:

- Become proficient in the presentation of data
- Setup automatic flags and alerts for data
- Learn quick charting techniques to improve chart presentation
- Develop interactive charts to select the data to be displayed
- Use relevant functions to summarise data

## Version(s):

2013, 2016, 2019, 365



## 1 day



 440.00


## Course times:

9:00am-4:30pm

## Delivery Options

 Public Schedule  Live Online

 Group Training  In-house

 **Certificate upon Completion**  
Non-accredited course



## To book this course:

Call: **1300-2GO-CTS**

Web: [www.ctstraining.com.au](http://www.ctstraining.com.au)

Email: [info@ctstraining.com.au](mailto:info@ctstraining.com.au)



# Content:

## Conditional Formatting

- Understanding Conditional Formatting
- Highlighting Top or Bottom Values
- Working with Data Bars, Colour scales & Icon sets
- Creating a Schedule using Conditional Formatting

## Charts based on Tables

- Creating a Table
- Filtering a Table
- Creating Charts based on Tables
- Dynamic charts with Tables
- Using structured references with tables
- Calculated columns in Tables

## Formulas to Manage Data

- CHOOSE() function
- NA() function
- SUMIFS()
- LARGE() and SMALL()

## Quick Charting Techniques

- Simple chart formatting
- Row/Column control
- Resizing charts
- Adding more data
- Creating combination charts
- User defined charts and templates

## Creating Simple Interactive Charts

- Overview of worksheet controls
- Using a checkbox to include/exclude a data series
- Using a combo box to select data to be displayed
- Creating dynamic linked charts using option buttons
- Using a combo box to display different charts
- Using data validation for data selection
- Adding a scrollbar to control the display of a chart

## Reporting Progress in Charts

- Actual v Target
- Sparklines
- Creating a dynamic Conditional Chart

## Creating Dynamic Labels and Legends

- Adding a dynamic message to a chart
- Managing Titles and Labels with formulas
- Managing Legends with formulas
- Using Symbols for Legends
- Using Conditional Formatting.



# Excel Tables & PivotTables

## Intermediate



### Overview:

This course is designed to develop experience and confidence in using Excel pivot tables to analyse data and produce sophisticated management reports. Learn to create and work with Pivot Tables to view and analyse your data in a variety of ways. Discover how to perform a variety of calculations with Pivot Table Data. You will learn how to construct Pivot Tables and Charts to consolidate and summarise your data.



### Prerequisites:

Intermediate level knowledge and experience with Microsoft Excel.



### Who should attend:

Users needing to manipulate and analyse data stored in Excel lists using pivot tables.



### Benefits:

- Gain quick insights into your data
- Perform powerful data analysis
- Create powerful data models



### Learning Outcomes:

- Create and manipulate PivotTables
- Present data in a variety of ways
- Create calculations in PivotTables
- Create various views of data
- Create PivotTables from external data
- Summarise data from multiple sources using PowerPivot



### Version(s):

2010, 2013, 2016, 2019, 365



1 day



440.00



### Course times:

9:00am-4:30pm

### Delivery Options



Public Schedule



Live Online



Group Training



In-house



### To book this course:

Call: **1300-2-GO-CTS**

Web: [www.ctstraining.com.au](http://www.ctstraining.com.au)

Email: [info@ctstraining.com.au](mailto:info@ctstraining.com.au)



### Certificate of Attendance

Non-accredited course



# Content:

## \* PivotTable Fundamentals

- What is a PivotTable?
- Why should I use a Pivot Table?
- What are the advantages?
- PivotTable Terminology
- Preparing your data for use in a PivotTable

## \* Creating a PivotTable

- Selecting the Data Source
- PivotTable Fields List
- Filtering data with Page Fields
- Adding Fields
- Removing Fields
- Understanding the Field icons

## \* Presenting Data in PivotTables

- PivotTable Toolbar
- Hiding and Unhiding Items
- Sorting Data in a PivotTable
- Using AutoSort
- Advanced AutoSort
- Refreshing a PivotTable Report
- Inserting Data into the Data Source
- Formatting Numerical Data
- Selecting Parts of a PivotTable
- PivotTable Formats
- PivotTable Options
- Change the Summary Function
- Adding Multiple Data Fields
- Changing Calculations
- Hiding and Showing Row/Column Details
- Displaying Data Details

## \* Grouping Data

- Grouping Data
- Group by Dates
- Group by Number
- Ungrouping Data

## \* Calculations in PivotTables

- Changing custom calculations
- Creating Calculated Fields
- Calculated Items
- Using GetPivotData() function to extract information from the PivotTable

## \* Using Other Sources of Data

- Selecting data from another Excel workbook
- Connecting to an Database i.e. Microsoft Access database
- Using a Saved Query as the data source
- Using a Comma-delimited text file as the source of a PivotTable

## \* Using PivotCharts

- PivotChart terms
- Modifying the Chart
- Caution - Loss of Formatting in PivotCharts

## \* Publishing PivotTables to the Web

- Saving a PivotTable as a web page
- Creating Interactive PivotCharts - Web
- Adding Fields to a PivotChart - Browser

## \* Analysing Data from Multiple Ranges

- Setting up the PivotTable using multiple ranges
- Using Multiple Page Fields

## \* Re-using PivotTables

- Requerying data
- Using Saved queries
- Automating PivotTable Updates
- Saving a PivotTable Template

