

## ADVANCED MS EXCEL – 4 DAYS

Skills Category: Management Skills  
Unit Standard: 10131,120372, 120379,  
120385  
NQF Level 5  
Credits: 25



**Training & Consulting**  
*Unlocking your hidden Potential*

### *Target Audience*

**Minimum 8 Delegates**

ADVANCED MS EXCEL is ideal for all persons using Excel spreadsheets. Professions that have attended include accountants, actuaries, auditors, business analysts, chartered accountants, civil engineers, construction, consulting, corporate finance, engineers, farming, finance.

### *Course Objectives*

- ❖ To adapt to the differing nature and to utilize application of MS EXCEL.
- ❖ Using the new tools that Microsoft have introduced
- ❖ Easily cleaning up data received to report on
- ❖ Understanding and making use of Pivot Tables, to turn data into reports
- ❖ Reporting findings graphically via charts and other visualisation techniques
- ❖ Ability to create an automated reporting pack that changes month on month with no effort
- ❖ Perform partial lookups where the words aren't exactly the same
- ❖ Get dates to work how you expect them to.
- ❖ For a full listing see the contents below

# Course Outline

## Lesson 1: MS Excel Tips and Tricks

- Viewing many parts of the spreadsheet (at the same time)
- Don't hide rows- group them rather
- See sheet names in portrait style
- Selecting ranges with mouse and arrow keys- short cuts
- Enter date and time stamps- unchanging
- Doing Quick Calculations in a spreadsheet
- The Quick Access Toolbar

## Lesson 2: Filtering and Sorting

- Data sorting-Revision, colour and icon sorting
- Sorting the columns instead of the rows
- Create a custom sorting list
- Data Filtering
- Remove rows with the Filter
- Remove duplicate rows
- Use Advanced Filter for repeating filters

## Lesson 3: The Specials- GOTO and Paste

- GOTO Special- find comments, values, formulas and more
- Find errors, conditional formatting and data validation
- Copy Visible Cells Only
- Fill in all the blanks
- Paste Special- Values, Formulas with/without formatting
- Paste Special- convert negatives to positives
- Switch rows to columns and columns to rows
- Paste without overwriting blank cells
- Re Use the Format Painter

## Lesson 4: Tools for text

- Find Replace- standard uses
- Find Replace- Change formatting on many cells
- Remove between brackets or characters
- Single Column to Multiple Columns
- Import CSV's into the correct columns

- Find partial names or between characters (fuzzy logic)
- Change the \$ signs on multiple cells with FIND/REPLACE
- Import CSV but correct for 'numbers' that start with zero e.g. credit card numbers

## Lesson 4: Pivot Tables

- Required data format for Pivot tables
- Create a Pivot Table- Step by Step
- Inserting Values into a Pivot Table
- Enhancing the values e.g. percentage of another column
- Show the details of a number in the Pivot Table
- Laying out the Pivot Report in completely separate columns
- Working with the rows in a Pivot Table- dropdown
- Working with the rows in a Pivot Table- field settings
- Normalize Pivot Reports to use elsewhere as a copy paste
- Working with the Columns in a Pivot Table
- Working with the Filter in a Pivot Table
- Automatically duplicate your Pivot Tables with different selections
- Slicers in a Pivot Table
- Control all Pivot Tables and Charts at once
- Timelines in a Pivot Table
- Grouping Dates into days, months, quarters and years in a Pivot Table
- Grouping Dates into weeks in a Pivot Table
- Grouping Text in a Pivot Table
- Grouping Numbers in a Pivot Table
- Pivot Charts in Excel
- Problems with grouping in Pivot Tables
- Protect the source data of a pivot table
- Add a calculation INSIDE a Pivot Table
- Conditional Formatting within a Pivot
- Get information out of a Pivot into a cell
- Switching off the GETPIVOTDATA
- Add up ITEMS within a Pivot Table Field

## Lesson 6: Conditional Formatting

- Change cell colour based on value
- Change color based on benchmark in another cell

- Highlight all above average cells
- Add comparative bars into cells
- Create heat maps in Excel
- Add risk robots, milestone, up and down icons to Excel cells
- Control the heat maps, icons and data bars in conditional formatting
- Conditional Formatting- Linking to different cells
- Control what is entered in an Excel cell- Data Validation
- Control the inputs in a cell based on another cell

## Lesson 7: Function and Formula Basics

- Tip- Opening Frequent files
- Enter formula into many cells (at the same time)
- Function Wizard
- Auditing Toolbar
- Referring to fixed cells
- Using the F4 shortcut for \$ signs
- Dollar Sign (\$A\$1) Examples
- The basic "IF" function
- How to (safely) build a nested IF formula
- IF this AND this AND this is True
- See the numbers behind a formula
- Change formula across many sheets at the same time
- Update the calculations on only one sheet (for large spreadsheets)

## Lesson 8: Text Functions

- Fitting text inside a cell
- Quick entry of rows of data
- Quick Drop Down List
- Printing Tips
- Get Excel to read out the text and numbers
- Join text from many cells
- Extract parts of the text from cells
- Force Excel to see the value (instead of text)
- Change text to lower, UPPER or Proper case
- Remove unnecessary spaces
- Create a find/ replace formula
- Find where a certain character is in a cell
- Force excel to treat number as text

## Lesson 9: Key Lookup Functions

- VLOOKUP explained in simple terms
- Build your first VLOOKUP
- The many uses of VLOOKUP

- Vlookup approximate match (True instead of False)
- Vlookup partial text from single cell- fuzzy lookup
- Automatic Sorting in Excel
- Handling Error Messages- Remove the impact of #NA, #DIV/0! and more

## Lesson 10: SUM, COUNT, AVERAGE IFS

- Sum, count or average if certain cells match
- Sum, count or average cells e.g. bigger than
- Sum, count or average with many conditions
- Sum, count or average with partial matches

## Lesson 11: Charting In Excel

- Excel Charting introduction
- Create a chart
- Align chart to the grid lines
- Chart doesn't look right? First thing to try
- Customise the chart title, area, legend and more
- Vertical Axis- force the scale, reverse the order, labels and more
- Horizontal Axis- dates vs text, reverse order, show all labels
- Series- overlapping, big and small series, gaps
- Add more series to the chart- 3 ways
- Show big and small numbers on the same chart (and be able to see them)
- Show months, quarters AND years on the chart axis
- Bar Charts
- Pie Charts
- Area Charts
- Radar Charts (to compare projects?)
- Show mini trend charts for large reports
- Copy the format of one chart to another chart
- Remove Zeros from chart labels
- Combine a column with a line chart (or other combinations)
- Stop charts stretching when the column width changes
- Customise the series marker to your own image
- Add linked commentary directly to the chart
- Add commentary to the axis
- Add commentary to labels and call outs
- Add commentary to labels for older versions of Excel
- Hiding a series with NA()
- Create a waterfall chart (pre Excel 2016)
- Create a waterfall chart (Excel 2016 and higher)
- Understand and use XY charts e.g. Risk Register
- Change the default colour scheme in charts

- Create a chart template for re-use
- Add a trendline to a chart
- Benefit of using a table for chart data
- Link Excel chart to PowerPoint or Word

## *Course Delivery*

Starting time : 08h30  
Mid-morning break : 10h00 – 10h15  
Lunch : 12h00 pm – 12h45  
Mid-afternoon break: 14h30– 14h45  
Knock off : 16h00

### ***Delivery Method:***

On-site & Virtual

The programme is facilitated by a competent subject matter specialist/s, which utilises the following techniques to ensure that the session is practical and experiential: Discussion; Role Plays; Exercises & Case Studies; Simulation; and learner assessment.

### ***Assessment and Certification***

#### ***Formal Assessment:***

Each learner will be provided with an assessment guide on the last day of the programme in which a range of assessment methods and tools will be used to assess the competence level of each individual learner.

#### ***Feedback:***

Learners will receive comprehensive, detailed and accurate feedback on assessment.

#### ***Certification:***

When the learner is found to be competent in the specific field of knowledge a certificate will be issued.

#### ***Language of delivery:***

English

**PLEASE EMAIL COMPLETED REGISTRATION FORM BACK TO:**

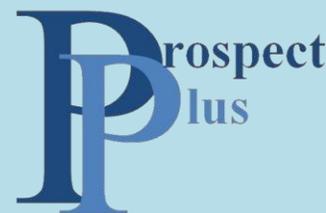
**Email: [info@prospectplus.co.za](mailto:info@prospectplus.co.za)**

**TEL: 072 944 5909**

## Advanced MS EXCEL Workshop

5 Days

In-house or Open Course



**Training & Consulting**  
*Unlocking your hidden Potential*

### COMPANY DETAIL

Company Name: .....Country.....Cell.....

Postal Address.....Postal Code.....

Tel Number.....Fax Number.....

Nature of Business.....

### NOMINEES

|   |
|---|
| 1. Name:.....Surname:.....Position..... |
| 2. Name:.....Surname:.....Position..... |
| 3. Name:.....Surname:.....Position..... |
| 4. Name:.....Surname:.....Position..... |

**(For more Delegates Please Photocopy)**

### ORGANISATION APPROVAL

Approving Manager Name: \_\_\_\_\_

Title: \_\_\_\_\_ Organization: \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ e-mail \_\_\_\_\_

Signature : \_\_\_\_\_ ( This booking is invalid without a signature)

**DELEGATE FEE: 10 500.00 – Fees includes course documentation, Facilitation, assessments & Certificates on completion of Course. An additional cost of R2 000 for laptop hire**

### PAYMENT METHODS

**Bank Transfer payments** to be made payable to: **Prospect Plus (Pty) Ltd, NedBank, Account Number: 1171790759, Branch Code: 19130500**

**please Email this form and proof of Payment to [andries@prospectplus.co.za](mailto:andries@prospectplus.co.za)**

### TERMS AND CONDITIONS

**CANCELLATIONS:** By completing this registration form, the client hereby agrees that Prospect Plus will not be able to mitigate its losses for any less than 50% of the total contract value. Cancellations must be received in writing seven days prior to the event. Only cancellation made in writing and addressed for the attention of the Chief Financial Officer will be recognized by Prospect Plus. Cash alternatives will not be offered although delegate substitutions are welcome any time. Hereafter, the full workshop fee is payable.

If for any reason Prospect Plus decide to amend this workshop, we are not responsible for covering airfare, hotel or other costs incurred by registrants. In the event that I Prospect Plus cancel the event, Prospect Plus reserves the right to transfer this booking to another workshop to be held in the following six months, or to provide a credit of an equivalent amount to another workshop in the same sector within the following six months.

**INDEMNITY:** Should for any reason outside the control of Prospect Plus, the venue or speakers change, or the event be cancelled due to act of terrorism, extreme weather conditions, industrial action Prospect Plus shall Endeavor to reschedule but the client hereby indemnifies and Prospect Plus holds harmless from any costs, damages, and expenses including attorney fees, which are incurred by the client. The construction validity and performance of this Agreement shall be governed in all aspects by the laws of Republic of South Africa to the exclusive jurisdiction of whose course the parties hereby agree to submit.

**PAYMENTS ARE REQUIRED WITHIN 7 DAYS OF INVOICE.**