

Overview

This day course prepares the participant to work with data tools, including Vlookup, automatic subtotals, autofilter and the indispensable autosum function. Information is derived from data with sorting, tables and pivot tables. Data consolidation is explored. Hands-on practice familiarizes attendees with these powerful Excel tools for extracting information from data.

Prerequisites

Excel Intermediate

Objectives

- Ⓞ Understand through experience some of the issues around linking and embedding documents.
- Ⓞ Use filters and autosum to manage data and extract information from it.
- Ⓞ Investigate some common file formats used in importing and exporting data
- Ⓞ Investigate all of the Vlookup function's features including placing data into categories and working with hidden data
- Ⓞ Create Tables and create summary worksheets to flexibly consolidate data
- Ⓞ Analyze Multi-dimensional Data with PivotTables

Outline

Skills Review

Managing Lists, Data Consolidation

- Document Linking and Embedding
- Setting Up a Table
- Sorting a Table
- AutoFilter
- Automatic Subtotals
- Conditions in Formulas
- COUNTIF, SUMIF

Importing and Exporting Data

Importing from an External File

- Compatible File Types
- Delimiters
- Programs Often Imported From
- Importing Data from Access and from the Web

Working with Lookup and Vlookup functions

- Pitfalls to avoid
- Working with hidden data

Exporting Data

Data Consolidation

- Developing 3D Formulas that leverage a function's range inclusion
- Understanding a 3D formula's worksheet and file referencing syntax
- Built-in Data Consolidation Tool

When to Use a Real Database Tool Pivot Tables

- How a PivotTable Organizes Data
- PivotTable Fields
- Text Fields and Numeric Fields
- Creating PivotTables
- Selection in PivotTables
- PivotTable Tools Tab
- Table Options Tab
- PivotTable Field Settings
- PivotTable Field Grouping
- Using the Report Filter (formerly) Page Field to View Subsets of the Data
- Updating a PivotTable
- More Than Three Dimensions
- PivotCharts

File Protection