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## Microsoft Excel Advanced – Level 4

### Course Outline

This is the second Advanced level Excel course. The aim is to continue developing Excel skills, deepening the understanding of advanced features.

This course is suitable for PCs using Windows.

### Prerequisites

Attendees will be well familiar with the Excel environment and Excel basics. They will have a strong understanding of Excel workbooks and worksheets and be able to use Zoom

### Technical Requirements

It is recommended attendees utilise two screens on the day of training; one to view the facilitator's presentation and one to complete the exercises.

A computer or laptop with Microsoft 365 installed and an internet connection is necessary. Zoom needs to be installed, the free version is sufficient.

### Learning Outcomes

Participants will learn more about advanced Excel features and how to use them effectively.

At the completion of this course the attendees will be able to:

- Understand and create Pivot Tables
- Use advanced Pivot Table techniques
- Create Pivot Charts
- Perform calculations on loans and investments using financial functions
- Work with Microsoft 365 Functions
- Record and Run Macros

### Course Duration

This is a half-day 3½ hour course.

### Delivery Mode

The course is hands-on, facilitator led, online or onsite.

The facilitator will step participants through the course. Participants will be able to communicate with the facilitator at all times and questions are encouraged.

Course material and exercise files will be provided.

## Contents

### Pivot Tables

- Creating Pivot Tables
- Adding Fields
- Filtering Pivot Tables
- Switching Labels
- Formatting a Pivot Table
- Slicers

### PivotTable Techniques

- Compound Fields
- Using Count
- Formatting Values
- Pivot Table Grand Totals
- PivotTable Subtotals
- Percentages
- PivotTable Grouping
- Running Totals
- Calculated Fields
- Custom Names
- PivotTable Options
- Sorting

### Pivot Charts

- Insert a pivot chart
- Add Fields
- Name the Chart
- Pivot the Chart Fields
- Sort and Filter
- Insert Slicers and Timelines
- Chart Elements
- Chart types
- Embedded charts

### Microsoft 365 Functions

- IFS
- FILTER

### Financial Functions

- PMT
- FV
- NPV
- PV
- RATE
- Goal Seek

### Recording Macros

- Saving a Document as Macro Enabled
- Recording a Simple Macro
- Running a Macro
- Viewing a Macro
- Editing a Macro
- Running a Macro from the Ribbon
- Assigning a Keyboard Shortcut
- Assigning a Macro to a Button