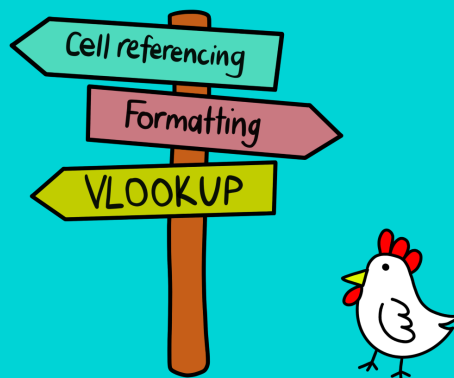


Learn with Lucy

Excel



Pack 1: Learning objectives

By the end of this pack you will be able to understand the following:

Types

- Four of the data types that Excel recognises – strings, numbers, Booleans, and functions.

Functions and formulas

- The structure of a basic function.

Cell referencing

- The concept of a cell reference and how to apply this to a maths problem.

Pack 1: The problem

Chicken expenses

By the end of this pack, we will have used the above concepts and some other Excel features to solve our real-life problem:

- *Given all the expenses we've had after getting chickens, when will we break even on eggs?*

Pack 2: Learning objectives

By the end of this pack you will be able to understand the following:

Layout and printing

- The 'view' buttons – normal, page layout, and print break preview – and the handier features in the page layout tab.
- Excel's pagination quirks and the basics of smart printing including: how to use page breaks, orientation, size, print area, selection, and scale to fit.

The fill handle

- Using the fill handle and auto-fill helper to fill numbers, dates, and formulas.
- The basics of flash-fill and custom lists.

Borders and simple formatting

- Using the format cells box and border tool.
- Adjusting column width and row height for consistent spacing.
- Different ways to align text – vertically, horizontally, indenting, wrapping, merging, line breaks, and orientation.
- Different ways to copy-paste formatting.

Tables

- The concept of structured versus unstructured data.
- Inserting a table and working within the 'structured' data world.
- The basic features of tables, with a focus on data filtering.
- Manipulating data in a table using CONCAT and ISNUMBER.
- The concept of an 'if statement' and using the IF function in a table.
- Nesting functions in a table.

- The difference between standard cell referencing (for unstructured data) and 'structured referencing' in tables.
 - The notation for referencing a column in a table using [square brackets].
 - The notation for referencing a cell in a table using '@'.
-

Charts

- The basics of how to make and format charts.
-

Pack 2: The problem

Weight tracking 🏋️

By the end of this pack, we will have used the above concepts and some other Excel features to solve our real-life problem:

- *We need to make a print-friendly sheet to write our weight on each morning, and a log to record these weights for later analysis.*

Pack 3: Learning objectives

By the end of this pack you will be able to understand the following:

Importing data

- Using (and troubleshooting) Excel's importing features.
- The difference between importing and copy-pasting data.
- Comma separated values (CSV) and the .csv file format, and how to open and re-save these files as Excel Workbooks (.xlsx).
- Importing data the newer way with Power Query.
- Importing data the older way with Text Import Wizard.
- Pasting data so it formats into columns ('import lite').

Advanced cell referencing

- How to enter 'formula view' mode and go behind the scenes to see how Excel really handles cell referencing.
- How Excel's default 'relative referencing' style works (for unstructured data).
- R1C1 reference style – how Excel talks to itself.
- How to enter and leave the R1C1 view.
- Using '\$' to lock a cell reference and applying this in different scenarios.

VLOOKUP

- Using the VLOOKUP function and applying this in different scenarios

Pivot Tables

- How to create a basic Pivot Table.
- The various features on the associated ribbon tab – Pivot Table Analyse.
- How to use the GETPIVOTDATA function.

Conditional Formatting

- How conditional formatting can help show patterns and trends in data.
- What's inside the conditional formatting menu.
- Applying and editing a basic formatting rule.
- Creating a new rule with Boolean-related formulas.

Naming cells

- Making, editing, and deleting names for cells and ranges.
- How to use a name in a formula.

Validating data

- What data validation is, how to apply it (without overdoing it), and why it can help data hygiene.

Find & Replace

- How to use Excel's Find & Replace feature effectively.

Pack 3: The problem

Finance tracking

By the end of this pack, we will have used the above concepts and some other Excel features to solve our real-life problem:

- *We need to set up some basic, automated financial tracking sheets for a busy freelancer.*

Bonus lessons

Business Class 1

The problem: Build a simple email generator.

The scenario: HR sends us a large, imperfect sheet of staff names to generate email addresses according to a set of specific requirements.

- We complete each requirement with a small set of functions, including IF.
- We also learn the basics of Boolean logic, then use the AND function.

This task teaches us how to: work methodically across table columns, and use basic text manipulation skills that can be applied in numerous work situations.

Business Class 2

The problem: Build an inventory sheet for a stocktake.

The scenario: Head office asks us to fix our small company's inventory and do a stocktake to ensure the data is accurate.

- We complete the task using a small set of useful features and functions.

This task teaches us basic techniques for tracking, comparing, and correcting data that can be applied in numerous work situations.

Don't panic 🤔

An introduction to:

- The main formula errors #VALUE!, #N/A, #NAME?, #REF!, #DIV/0!, #NUM!, #NULL!, #SPILL!, and #CALC!.
- The concept of 'catching' errors using the functions ISERROR, ISERR, and IFERROR.

Mostly harmless 📁

A collection of tips and tricks relating to:

- Excel features inside and outside the main grid, keyboard shortcuts, formatting, and tables.

Miscellaneous

The following **functions** are used during the course:

AND	ISERROR	RIGHT
AVERAGE	ISNUMBER	SUBSTITUTE
CONCAT	LEFT	SUM
COUNTIF	LOWER	SUMIF
EXACT	MAX	TEXTJOIN
FILTER	MID	TODAY
FIND	MIN	TYPE
GETPIVOTDATA	NA	UPPER
IF	NOT	VLOOKUP
IFERROR	OR	XLOOKUP
ISERR	PRODUCT	

A selection of **keyboard shortcuts** are used during the course for basic commands, moving around the grid, and common operators.

Learn with Lucy

