

Fundamentals of MS Excel for Professionals CA Ankita Mondkar Pawar,

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Topics Covered

- » Formatting
- » Basic Functions
- » Cell Linking
- » Table & List Management

Formatting

- » Formatting Functions
- » Need for Formatting
- » Basic Formatting
- » Conditional Formatting
- » Tips and Tricks

Basic Formatting

» Fonts

- » Bold / Italic / Underlined / Struck Through / Sub Script / Super Script
- » Borders
- » Text Alignment
- » Text Indentation
- » Wrap Text
- » Merge Text
- » Number Formats



Need for Formatting

Unformatted Data

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5	С	5	5	4	6	4	5
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Data formatted to automatically track the change in marks attained

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- » Professional Look
- » Tracking the trend in data
- » Highlighting anomalies & errors in data

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- » Clipboard Functions like Cut, Copy, Paste & Format Painter
- » Font formatting functions like Bold, Italics, Cell borders, Text Size, Font, etc.
- » Text alignment, Indentation, Text angle, Text wrapping, Cell merge, etc.
- » Cell Formats, Number formats, Date formats, Increase / Decrease Decimal
- » Cell styles, Conditional formatting, Table styles
- » Data sorting, Filtering, Fill series, Auto sum, etc.



Conditional Formatting

Cells containing values which are

- » Greater than certain value
- » Lower than certain value
- » Equal to a certain value
- » Between two values
- » Highlighting Low, Medium and High values
- » Highlighting errors using the ISERROR formula
- » Highlighting repetitions using the COUNTIF formula



Formatting Tips & Tricks

- » Use "Format as Table" setting
- » Use "Format Painter" to quickly copy formats between two cells
- » Use "Cell Styles" which are ready formatted cell styles
- » Use the Fill handle to copy formatting
- » Usage of short cuts

Use "Format as Table" setting

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Use "Cell Style" setting

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Basic Functions

Function Name	Formulae
Sum function	{SUM(Number 1, Number 2, Number 3,)}
Count function	{COUNT(Range)}
Average function	{AVERAGE(Range)}
Minimum function	{MIN(Range)}
Maximum function	{MAX(Range)}
Round function	{ROUND(Number, Number of digits to which rounded off to)
If function	<pre>{IF(Logical Test, Value if test is true, Value if test is false)}</pre>
And function	{AND(Logical Test 1, Logical Test 2,)}
Or function	{OR(Logical Test 1, Logical Test 2,)}

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Cell Linking

- » Need of Linking
- » Cell referencing (Usage of \$)
- » Functions for Text Linking
- » Functions for Number Linking
- » Value Lookup formulae

Need for Cell Linking

- » Dynamic changes in data are easily captured
- » Efficient usage of time and efforts
- » Increases accuracy
- » Easy reference to source data
- » Facilitates sensitivity analysis
- » Creation of an audit trail

Cell Referencing

- » Usage of \$ for efficient cell referencing
- » Absolute Row & Relative Column: Row reference is locked but column reference is dynamic : eg.A\$1
- » Relative Row & Absolute Column : Row reference is dynamic but column reference is locked : eg.\$A1
- » Absolute Referencing : Both Row and Column references are locked : eg.\$A\$1
- » Relative Referencing : Both Row and Column references are unlocked : eg.A1



Functions For Text Linking

- » Concatenate : to join multiple text strings together
- » Exact : To compare two text strings and find out if they are exactly the same.
- » Left : Returns the specified number of characters from the start of the text string.
- » Right : Returns the specified number of characters from the end of the text string.

Value Lookups

- » Hlookup : Looks in the top row of an array and moves across the columns to return the value of the indicated cell : Hlookup(Lookup Value, Table Array, Row Index Number, Range Lookup)
- » Vlookup : Looks in the first column of an array and moves across the row to return the value of the indicated cell : Vlookup(Lookup Value, Table Array, Column Index Number, Range Lookup)

Table & List Management

- » Sorting of Values
- » Application of Filters
- » Pivot Table
- » Data Validation



Sorting of Values

- » Values can be sorted in the ascending & descending order
- » Days & Months can be sorted in the calendar series

Application of Filters

- » Filters play a crucial role in analysis of data
- » Used in simple scenarios like data sorting and even in pivot tables
- » Information for a particular class of data can be viewed and analyzed
- » Proper feeding of data is necessary for correct classification
- » Extensively used in MIS reporting

Pivot Table

- » Strong means of analysis and reporting of data
- » Extracting useful data from huge database in required form
- » Easy grouping of/ classification of information
- » Both detailed and broader views possible depending upon analytical requirement
- » Efficient and effective tool for MIS reporting
- » Database to be maintained in proper manner to avoid any errors in the table

Data Validation

- » Used for restricting the values that can be entered into a cell.
- » Used in creation of forms & databases
- » It throws up an error alert when invalid data is entered into the cell.
- » Data Validation helps prevent errors in cell data entry.
- » Validation criteria can allow whole number, decimal, values specified in a list, date, time, or a specified text length.

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Tips & Tricks

- » All text entered in formulae to be entered within "double inverted commas".
- » Maximise use of keyboard shortcuts
- » Maximise usage of formulae and cell linking
- » Compose text using "&". Eg. =A1&B1&C1 will give a result of combining cells A1, B1 & C1.
- » While creating any model in excel, data flow should be in the following order:
 - 1. Inputs
 - 2. Calculations
 - 3. Output Results
 - 4. Reports & Summaries

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Shortcut key	Action Menu
Ctrl+A	Select All
Ctrl+B	Bold Format
Ctrl+C	Сору
Ctrl+D	Fill Down
Ctrl+F	Find
Ctrl+G	Goto
Ctrl+H	Replace
Ctrl+I	Italic Format
Ctrl+K	Insert Hyperlink
Ctrl+N	New Workbook
Ctrl+O	Open File
Ctrl+P	Print File
Ctrl+R	Fill Right
Ctrl+S	Save File
Ctrl+U	Underline
Ctrl+V	Paste
Ctrl W	Close File
Ctrl+X	Cut
Ctrl+Y	Repeat
Ctrl+Z	Undo
Alt+D+F+F	Apply / Remove Filters
Ctrl + Page Down	Move to Next Sheet
Ctrl + Page Up	Move to Prior Sheet

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THANK YOU!!!

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