

## Advanced Excel Training: Participant Guide

For a complete explanation of each topic, see the page references in parentheses below to the complete Excel Training Participant Guide (PDF)

**Green Text** – References an Excel feature, keyboard command, or icon

**Blue Text** – References a part of our dataset

### ACTIVITY 1 // Unlocking (and Locking) your Spreadsheet (pg. 8)

**Unlock your sheet:** Navigate to the **Review Ribbon, Unprotect Sheet**, Password is “lock” in lowercase.

**Unlocking only certain cells:** Add specific data or making sure specific cells are not mistakenly altered!

### ACTIVITY 2 // Formulas to Aggregate & Analyze Data (pg. 32)

**VLOOKUP() Equation:** To pull data in from another spreadsheet using a connecting value (pg.34)

- Make a new column in “Working” tab
- On ASQ tab, sort ASQ Completion dates “Z to A”
- Write VLOOKUP() Equation in “Working” tab  
`=VLOOKUP(D2,'ASQ-3'!D:J,7,FALSE)`
- Change column to date values

**IF() Equation:** To only use the above equation if the client is a “Child” (pg. 41)

- Option 1: filter out children, and “Clear Contents”
- Option 2: imbed the VLOOKUP() equation in an If() equation:  
`=IF(E2="Child",VLOOKUP(D2,'ASQ-3'!D:J,7,FALSE),"-")`

**IF() Equation + ISERROR() Equation:** To return a certain value if there is an error, and another if not

- Categories will be “Missing” if there was an error, and “Yes” if not  
`=IF(ISERROR(Y2),"Missing","Yes")`

**COUNTIF() Equation:** To count the number of times a certain value occurs. (pg. 39)

- Go to ASQ tab
- Add column for “ASQ Concern?”  
`=COUNTIF(Q3:U3,"Concern")`

## ACTIVITY 3 // Using PivotTables to Analyze Data (pg. 55)

### Clients by relationship

- Pull in data for PivotTable
- Learn how to add fields in your PivotTable

### Children by gender

- Copy and paste PivotTable from “Clients by relationship”
- Learn how to add a filter

### Number of families

- Create PivotTable with “Data Modeling” box checked
- Change the values to “Distinct Count” to have each family counted only once
- Add filter to ensure no blanks are counted (you need to make sure blanks are unclicked somewhere!)

### Relationship & Race/ethnicity

- First, pull into PivotTable “Race/ethnicity” and then “Relationship” underneath
- Then, pull “Relationship” to columns, and filter out “Child”
- Learn how to change the values to percentages of total column
- Make an additional table below, remove “Relationship” from PivotTable, and change contents to number values

### Average monthly incomes

- Change filter to adults only (remove “Child” by unchecking box”)
- Right click and select to group column items
  - o 0 - \$15000 range; Group by income in \$3000 intervals
- Learn how to ungroup items
- Learn how to remove “Grand Total”
- Right-click values and select “Show Details” to get complete record of that specific data

*\*Note: Refresh PivotTables every time you want to use PivotTable data!*

## ACTIVITY 4 // Make Charts & Graphs for a Visual Dashboard

### Complete formatting changes (pg. 24)

- Learn how to remove gridlines, merge cells, pull in an image, and use the “Format Paintbrush”

### Pull data in from PivotTables

- For most tables, use the =[source cell] to automatically create the GETPIVOTDATA equation you need
- For the “Race/Ethnicity by Relationship” table, learn how to Copy and Paste the values only

### Create Charts and Graphs (pg. 52)

Learn the basics of how to add and edit chart elements and edit visually:

- How to select and change chart type
- How to add in data and edit the data that is brought in
- How to bring in and remove chart elements
- How to format the chart visually