

# Excels Skills for Business

## Coursera

### Specialization

## Guide

Instructions: This guide is best used by also viewing the Navigation Pane in WORD. To do so go to the View tab, find the 'Show' menu and check the box next to "Navigation Pane." In GoogleDOCS use the "Document Outline." You can then scroll and more easily find and jump to the section you would like to see. There is also an INDEX at the end of this document. I have found clicking around in Coursera for the specific course I want to be cumbersome at times. The Coursera Quiklinks below allow you to go straight to the Course you would like to review in Coursera.

**UPDATE:** Some of the formatting in the INDEX was lost when I uploaded from WORD document to GoogleDocs. Page numbers may be off by 1 (So if it says page 10, it's probably on page 9.) Please tell me what you think about this document. I'm open to all suggestions and edits.

## Coursera Quiklinks

[Coursera Link to Entire Specialization Overview](#)

[Coursera Link to Course 1: Excel Skills for Business: Essentials](#)

[Coursera Link to Course 2: Excel Skills for Business: Intermediate](#)

[Coursera Link to Course 3: Excel Skills for Business: Intermediate II](#)

[Coursera Link to Course 4: Advanced](#)

## Course 1: "Essentials"

# Week 1-- Critical Core of Excel

In this module, you will learn about key foundational features of Excel: The Excel user interface, basic Excel terminology, how to operate essential navigational controls in Excel and how to perform basic data entry with Excel spreadsheets:

- [Taking Charge of Excel](#) - Explanation of Excel layout, tools and tabs and navigation, backstage view, opening files
- [Navigating and Selecting](#)
- [View Options](#)
- [Data Entry, Data Types, Editing and Deleting](#)
- [Fill Handle](#)

# Week 2 – Performing calculations

The syntax of formulas is very important in Excel. In this module, you will get introduced to formulas and functions - learn how to write them, use them to perform calculations and understand the different cell references.

- [Formulas](#)
- [Formulas in Context](#)
- [Functions I: Sum and Autosum](#)
- [Functions II: Average, Min and Max](#)
- [Absolute Cell References](#)
- [Calculations Across Sheets](#)

# Week 3 -- Formatting

Formatting helps to highlight key messages and make the data presentable. This module covers several formatting tools like font formatting, borders, alignment, number formatting, as well as the Excel styles and themes.

- [Formatting](#)
- [Borders](#)
- [Alignment Tools](#)
- [Format Painter](#)
- [Number Formats](#)
- [Styles and Themes](#)

## Week 4 – Working With Data

This module is all about working with data – and making it easy to work with. This week you will learn how you can manage your spreadsheets – find data with Filter and Sort, retrieve and change data using Find and Replace, and use Conditional Formatting to highlight specific data.

- [Managing Rows and Columns](#)
- [Find and Replace](#)
- [Filtering](#)
- [Sorting](#)
- [Conditional Formatting](#)

## Week 5 -- Printing

Sometimes you need to print your spreadsheets and this module will help you with that. Learn how you can optimise your spreadsheet for printing by managing margins, orientation, headers & footers, and more.

- [Print to PDF](#)
- [Print Preview](#)
- [Orientation Margins and Scale](#)
- [Page Breaks](#)
- [Print Titles](#)
- [Headers and Footers](#)
- [Save Options](#)

## Week 6 -- Charts

Charts are one of the most common ways to present data visually. This module walks you through creating and modifying charts in Excel.

- [Basic Chart Types: Pie, Column and Line Charts](#)
- [Move and Resize Charts](#)
- [Change Chart Style & Type](#)
- [Modify Chart Elements](#)
- [Sharing Charts](#)

## COURSE 2: “INTERMEDIATE I”

# **Week 1 -- Working with Multiple Worksheets & Workbooks**

This module is all about working with multiple worksheets and workbooks. Learn how you can combine data, manage datasets and perform calculations across multiple sources. And don't forget the Toolbox with handy shortcuts and ninja tips.

- Multiple Worksheets
- 3D Formulas
- Linking Workbooks
- Consolidating by Position
- Consolidating by Category

# **Week 2 -- Text and Date Functions**

By the end of this module, you will be an expert in Date and Text functions. This module discusses ways you can extract information and manipulate data to fulfil specific business requirements.

- Combining Text (CONCAT, &)
- Changing Text (UPPER, LOWER, PROPER)
- Extracting Text (LEFT, MID, RIGHT)
- Finding Text (FIND)
- Date Calculations (NOW, TODAY, YEARFAC)

# **Week 3 – Named Ranges**

Learn how you can create, manage and apply Named Ranges to enhance your calculations.

- Introducing Named Ranges
- Creating Named Ranges
- Managing Named Ranges in Formulas
- Apply Names

# **Week 4 – Summarizing Data**

Graduate to advanced formulas in this module. Learn how you can use functions like COUNTIFS to extract information from data, as well as generate graphical representations of it.

- COUNT functions
- Counting with Criteria (COUNTIFS)
- Adding with Criteria (SUMIFS)
- Sparklines
- Advanced Charting
- Trendlines

## Week 5 – Tables

Tables, tables, tables. Start with creating, formatting and managing tables and then move on to sorting and filtering tables to get the data you need. Finally, wrap up this module automating your tables to make your work more efficient.

- Creating and Formatting Tables
- Working with Tables
- Sorting and Filtering in Tables
- Automation with Tables
- Converting to Range and Subtotaling

## Week 6 – Pivot Tables, Charts and Slicers

This module deep dives into the popular (and very useful) pivot tables. Learn how you can create and modify them to solve a variety of business problems. Then gain skills to create interactive dashboards with pivot charts and slicers.

- Creating and Modifying a Pivot Table
- Value Field Settings
- Sorting and Filtering a Pivot Table
- Reporting Filter Pages
- Pivoting Charts
- Pivoting Slicers

# COURSE 3: “Intermediate II”

## Week 1 – Data Validation

We kick off this course with data validation and conditional formatting. This module takes you through creating and applying data validation, as well as working with formulas in data validation. This is followed by basic and advanced conditional formatting.

- Data Validation
- Creating Drop-down Lists
- Using Formulas in Data Validation
- Working with Data Validation
- Advanced Conditional Formatting

## Week 2 – Conditional Logic

Excel has several logical functions and this module explores some of them. Start by learning the concept of conditional logic in formulas, followed by how to conduct logic tests and use conditional operations, to your benefit. We will also look at nested IF functions to evaluate data.

- Logical Functions I: IF
- Logical Functions II: AND, OR
- Combining Logical Functions I: IF, AND, OR
- Combining Logical Functions II: Nested IFs
- Handling Errors: IFERROR, IFNA

## **Week 3 – Automating Lookups**

How do you find information from different parts of a workbook? This module introduces you to functions like CHOOSE, VLOOKUP, INDEX, MATCH and other dynamic lookups to find and display data from several sources.

- Introduction to Lookups: CHOOSE
- Approximate Matches: Range VLOOKUP
- Exact Matches: Exact Match VLOOKUP
- Finding a Position: MATCH
- Dynamic Lookups: INDEX, MATCH

## **Week 4 – Formula Auditing and Protection**

If you are worried that errors have crept into your worksheet, this module will show you how to check for errors, trace precedents and dependents, resolve circular references, and finally, protect your worksheets and workbooks from further harm.

- Error Checking
- Formula Calculation Options
- Trace Precedents and Dependents
- Evaluate Formula, Watch Window
- Protecting Workbooks and Worksheets

## **Week 5 – Data Modelling**

This module is all about data modelling. Learn to model different scenarios based on input, assumptions and/or outcomes. Also learn the use of functionalities like Goal Seek, Data Tables and the Scenario Manager to make your models more robust.

- Modelling Functions: SUMPRODUCT
- Data Tables
- Goal Seek
- Scenario Manager
- Solver

## **Week 6 – Recording Macros**

We all love a bit of automation, and this module teaches you just that. By the time you have completed this module, you will be able to identify the uses of macros, as well as create, edit and manage them to increase your efficiency.

- Record a Macro
- Run a Macro
- Edit a Macro
- Working with Macros
- Relative Reference Macros

## **COURSE 4: “Advanced”**

### **Week 1 – Spreadsheet Design and Documentation**

As an intermediate Excel user, you have the basics down. The first module of the Advanced course focusses on creating and maintaining accurate, flexible, responsive and user-friendly spreadsheets. You will learn how to design flexible and auditable spreadsheets, construct transparent calculations, create user-friendly navigation, and use styles, themes and formatting to tie it all up in a nice bow.

- Spreadsheet Design Principles
- Calculations
- Formatting
- Documentation
- Interface and Navigation

### **Week 2 – Advanced Formula Techniques**

Excel often requires you to perform complex analysis on large sets of data. This can be made a lot easier using array formulas, which can perform multiple calculations simultaneously and ensure the accuracy of

your spreadsheet. This module covers the use of array formulas, how to build them and use them effectively.

- Tables and Structured Referencing
- Using Functions to Sort Data
- Introduction to Array Formulas
- Working with an Array Function (TRANSPOSE)
- Solving Problems with Array Formulas

## **Week 3 – Data Cleaning and Preparation**

Been handed a messy spreadsheet? This module focuses on data cleaning and preparation. You will learn how to use dynamic and automated fixes, clean messy data, automate these processes through functions, and ensure data remains clean dynamically. We will use functions to fix dates, replaces blanks and remove unwanted characters from data – all to help us build an efficient solution that lasts.

- Replace blanks with repeating values
- Fix Dates (DATE, MONTH, YEAR, DAY, TEXT)
- Remove Unwanted Spaces (TRIM, CLEAN)
- Diagnostic Tools (ISNUMBER, LEN, CODE)
- Remove Unwanted Characters (SUBSTITUTE, CHAR, VALUE)

## **Week 4 – Financial Functions Working with Dates**

This module introduces financial functions into our Excel knowledge base. Financial functions are often used in businesses and Excel has a variety of tools to help you with that. This week, you will learn to apply date formulas in calculations, create loan schedules with financial functions, as well as use depreciation functions.

- Working with Dates (EOMONTH, EDATE, WORKDAY.INTL)
- Financial Functions (FV, PV, PMT)
- Loan Schedule (PMT, EDATE)
- Net Present Value and Internal Rate of Return (NPV, IRR)
- Depreciation Functions (SLN, SYD, DDB)

## **Week 5 – Advanced Lookup Functions**

It is always a good idea to make your spreadsheets (and work!) more automated. Automated lookups can make your work fast and efficient. This module builds on your array capabilities and explores a range of functions to create dynamic lookup ranges – INDIRECT, ADDRESS, OFFSET and INDEX.

- INDIRECT
- ADDRESS
- Introduction to OFFSET



- Solving Problems with OFFSET

## **Week 6 – Building Professional Dashboards**

To bring it home, this module guides you through the steps of building a professional dashboard. Data is meaningless unless it tells a story and can be used as business intelligence. This module will help you set up a dashboard – learn how to visualise data through graphs and charts, create data models, and add interactivity.

- Dashboard Design
- Prepare Data
- Construct Dashboard
- Creative Charting
- Interactive Dashboard

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