Microsoft Excel Update & Tips for CPAs

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Description

Microsoft Excel users always benefit from new features, functions, and power tools added to Excel.

This presentation incorporates examples of managing data, reporting on data with analysis and visualizations, new productivity features for CPAs, and how Excel works with the other apps within Microsoft 365.

The tips in this demonstration will help you, your team, and your organization work more efficiently in Excel.

Attendees will receive practical information and take-aways for immediate use.



Today's Demo Topics

1. New Excel Features

- PDF content to cells, Intelligent Services - Analyze, Power BI data connection, Show Changes to a workbook

2. New and Important Excel Functions

- Xlookup, Xmatch, Fuzzy Lookup, EOMonth, TEXTSPLIT, use of Vlookup with QuickBooks exports, and more

3. Data Visualization Features

- Chart Variations, Pivot Chart, Slicer Filters, Conditional Format uses, tips for Dashboards as interactive reports

4. Analyze Data with Pivot Tables and the PowerPivot Data Model

- Custom Calculations, (PowerPivot) Data Model, Relate Data, Pivot from multiple data sets, formatting tips, refresh settings,
- 5. Power Query Uses
 - Combining sets of data, manipulating and transforming data, unpivot data

Notes to this presentation

The Windows desktop version of Excel in Microsoft 365 Business will be featured. If you have an older version of Excel, are using the online version of Excel, or using a MacBook, you might not have all the features mentioned in this class.

If your questions are not answered during the class, please send your question after class to:

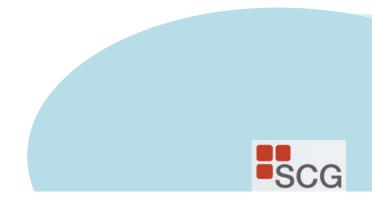
Judy@SCG-training.com



Take-Aways

Follow this link for access to the files used in this presentation and continuous learning take-away Excel files, PDFs, and tutorials.

tinyurl.com/yss6y34x



1. New Features in Excel

PDF content to cells Intelligent Services - Analyze Power BI data connection Show Changes to a workbook



Analyze Data (formerly IDEAS)



Ideas

Ideas in **Excel** will analyze your data, and return interesting visuals about it in a task pane.

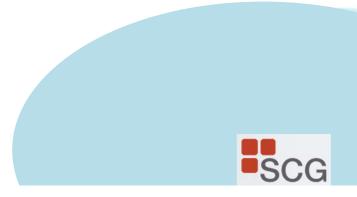
https://support.microsoft.com/en-us/office/ideas-in-excel-3223aab8-f543-4fda-85ed-76bb0295ffc4?ui=en-us&rs=en-us&ad=us#:~:text=Simply%20click%20a%20cell%20in,it%20in%20a%20task%20pane.



Ideas

Video example

https://support.microsoft.com/en-us/office/ideas-in-excel-3223aab8f543-4fda-85ed-76bb0295ffc4



Insert Data from Picture or PDF



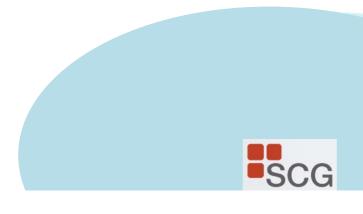
With the new Data from Picture feature, turn images that have table data into data that you can edit in Excel



Open Excel on your phone or tablet and tap the **Insert data from picture** button to get started



Next, narrow in on your data until you see it surrounded by a red border, then tap the capture button. If needed, you can use the sizing handles around the edges of the image to crop it to size first.



Australia 144500 Canada 5795 183975 Canada 5795 99 573705 France 4100 36 147600 Germany 7526 86 647236 United Kingdom 9528 45 428706 United States 10788 17 183396 Total 40190 2154672	Australia 2453 75 183975 Canada 5795 99 573705 France 4100 36 147600 Germany 7526 86 647236 United Kingdom 9528 45 428760 United Kingdom 17 183396	Country	Units Sold	Price	Revenue
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		Total	40190	17	183396
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		Total	40190	17	183396



Excel's powerful AI engine will process the image and convert it to a table. When it first imports your data, it will give you a chance to correct any issues it discovered during the conversion process. Tap **Ignore** to move on to the next issue, or **Edit** to correct the issue.



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	Germany		7526	86	647236
	United Kingdo	m	9528	45	428760
	United States		10788	17	183396
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Ca	nada		5795	99	573705
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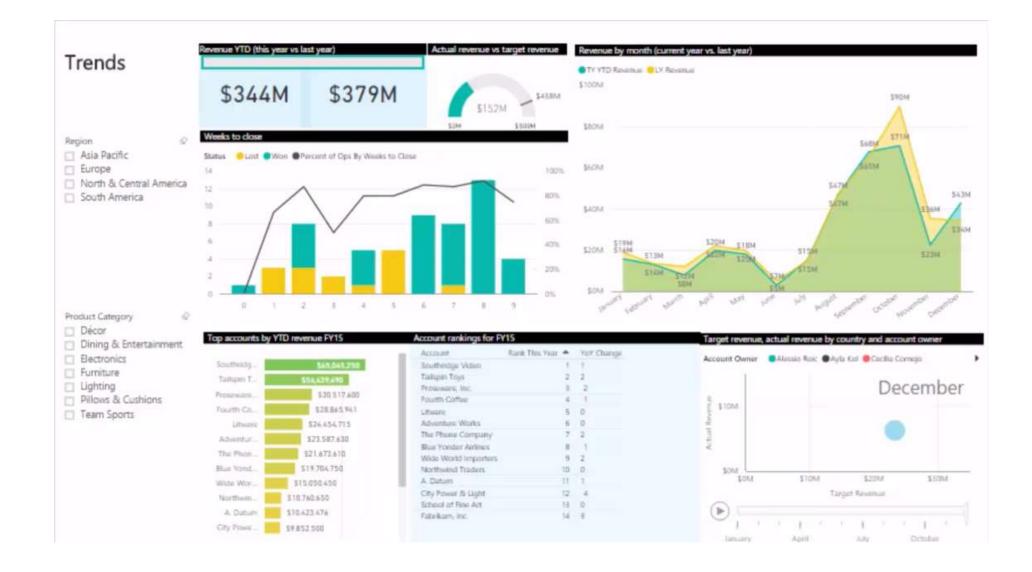
Press **Insert** when you're done, and Excel will finish the conversion process, and display your data.

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6	United Kingdom	9528	45	428760	
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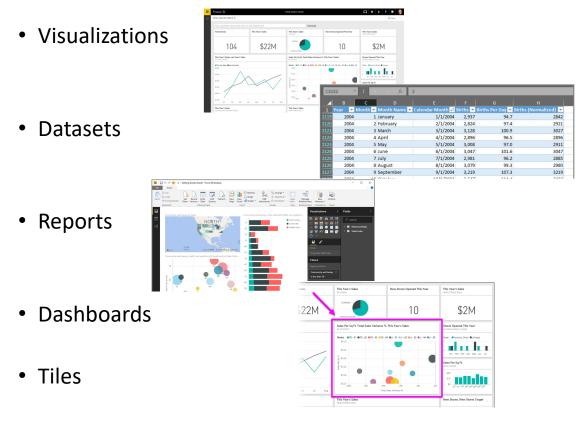
Excel Data Connection to Power BI





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Terminology



When you're *creating* a report or a dashboard, you can move, resize or arrange tiles.

When you're *viewing*, or *consuming*, a dashboard or report which means you're not the creator or owner, but the report or dashboard has been shared with you—you can interact with it, but you can't change the size of the tiles or their arrangement.

The parts of Power BI

Power BI consists of a Windows desktop application called **Power BI Desktop**, an online SaaS (*Software as a Service*) service called the **Power BI service**, and Power BI **mobile apps** for Windows, iOS, and Android devices.



A fourth element, **Power BI Report Server**, allows you to publish Power BI reports to an on-premises report server, after creating them in Power BI Desktop. Read more about <u>Power BI Report Server</u>.

2. New Functions in Excel

Xlookup, Xmatch Fuzzy Lookup EOMonth TEXTSPLIT Use of Vlookup with QuickBooks exports and more



Excel Function – XLOOKUP

=XLOOKUP(lookup_value, lookup_array, return_array, [if_not_found], [match_mode], [search_mode])

https://www.microsoft.com/en-us/videoplayer/embed/RE3RKR7?pid=ocpVideo0-innerdivoneplayer&postJsllMsg=true&maskLevel=20&market=en-us

No more counting column numbers! No need to rearrange columns!



XLOOKUP (example 1)

With XLOOKUP, you can look in one column for a search term, and return a result from the same row in another column, regardless of which side the return column is on.

This example uses a simple XLOOKUP to look up a country name, then return its telephone country code. It only includes the lookup_value (cell F2), lookup_array (range B2:B11), and return_array (range D2:D11) arguments. It does not include the match_mode argument, as XLOOKUP defaults to an exact match.

1	A	В	С	D	E	F	G
1		Country	Abr	Prefix		What is th	e dial code
2		China	CN	+86		Brazil	+55
3		India	IN	+91			
4		United States	US	+1			
5		Indonesia	ID	+62			
6		Brazil	BR	+55			
7		Pakistan	PK	+92			
8		Nigeria	NG	+234			
9		Bangladesh	BD	+880			
10		Russia	RU	+7			
11		Mexico	MX	+52			

XLOOKUP is different from VLOOKUP in that it uses separate lookup and return arrays, where VLOOKUP uses a single table array followed by a column index number. The equivalent VLOOKUP formula in this case would be: =VLOOKUP(F2,B2:D11,3,FALSE)

XLOOKUP (example 2)

Unlike VLOOKUP, XLOOKUP is able to return an array with multiple items, which allows a single formula to return both employee name and department from cells C5:D14.

C2	• ;	$\times \sqrt{f_x} = XLOC$	DKUP(B2,B5:B14,C5:D14)
A	В	С	D
1	Emp ID	Employee Name	Department
2	8389	Dianne Pugh	Finance
3			
4	Emp ID	Employee Name	Department
5	4390	Ned Lanning	Marketing
6	8604	Margo Hendrix	Sales
7	8389	Dianne Pugh	Finance
8	4937	Earlene McCarty	Accounting
9	8299	Mia Arnold	Operations
10	2643	Jorge Fellows	Executive
11	5243	Rose Winters	Sales
12	9693	Carmela Hahn	Finance
13	1636	Delia Cochran	Accounting
14	6703	Marguerite Cervantes	Marketing

XLOOKUP (example 3)

This example adds the if_not_found argument to the example.

A	В	С	D
1	Emp ID	Employee Name	Department
2	1234	ID not found	
3		No. Contraction of the second s	
4	Emp ID	Employee Name	Department
5	4390	Ned Lanning	Marketing
6	8604	Margo Hendrix	Sales
7	8389	Dianne Pugh	Finance
8	4937	Earlene McCarty	Accounting
9	8299	Mia Arnold	Operations
10	2643	Jorge Fellows	Executive
11	5243	Rose Winters	Sales
12	9693	Carmela Hahn	Finance
13	1636	Delia Cochran	Accounting
14	6703	Marguerite Cervantes	Marketing

XLOOKUP (example 4)

This example looks in column C for the personal income entered in cell E2, and finds a matching tax rate in column B.

It sets the if-not_found argument to return a 0 if nothing is found.

The match_mode argument is set to 1, which means the function will look for an exact match, and if it can't find one, it will return the next larger item.

The search_mode argument is set to 1, which means the function will search from the first item to the last.

F2 *	XVI	fx =XLOOKI	JP(E2	,C2:C7,B2:B7,0,1	.,1)
A	В	С	D	E	F
1	Tax Rate	Max Income		Income	Tax Rate
2	10%	\$9,700		\$46,523	24%
3	22%	\$39,475	20		
4	24%	\$84,200			
5	32%	\$160,726			
6	35%	\$204,100			
7	37%	\$510,300			

Note: Unlike VLOOKUP, the lookup_array column is to the right of the return_array column, where VLOOKUP can only look from left-to-right.

XLOOKUP (example 5)

This example uses a nested XLOOKUP function to perform both a vertical and horizontal match. It will first look for Gross Profit in column B, then look for Qtr1 in the top row of the table (range C5:F5), and return the value at the intersection of the two.

This is similar to using the INDEX and MATCH functions in conjunction.

You can also use XLOOKUP to replace the HLOOKUP function.

The formula in cells D3:F3 is:

=XLOOKUP(D2,\$B6:\$B17,XLOOKUP(\$C3,\$C5:\$G5,\$C6:\$G17))

D3 1	• : × ✓ fx	=XLOOKUP	(D2,\$86:\$817,)	KLOOKUP(\$C3	\$C5:\$G5,\$C6	:\$G17))
A	В	с	D	E	F	G
1						
2		Quarter	Gross Profit	Net Profit	Profit %	
3		Qtr1	\$25,000	\$19,342	29.3%	
5	Income Statement	Qtr1	Qtr2	Qtr3	Qtr4	Total
6	Total sales	\$50,000	\$78,200	\$89,500	\$91,250	\$308,950
7	Cost of sales	(\$25,000)	(\$42,050)	(\$59,450)	(\$60,450)	(\$186,950)
8	Gross profit	\$25,000	\$36,150	\$30,050	\$30,800	\$122,000
10	Depreciation	(\$899)	(\$791)	(\$202)	(\$412)	(\$2,304)
11	Interest	(\$513)	(\$853)	(\$150)	(\$956)	(\$2,472)
12	Earnings before Tax	\$23,588	\$34,506	\$29,698	\$29,432	\$117,224
14	Tax	(\$4,246)	(\$6,211)	(\$5,346)	(\$5,298)	(\$21,100)
16	Net profit	\$19,342	\$28,295	\$24,352	\$24,134	\$96,124
17	Profit %	29.3%	27.8%	23.4%	27.6%	26.9%

3. Excel Data Visualization

Chart Variations Pivot Chart, Slicer Filters Conditional Format uses Tips for Dashboards as interactive reports



Excel Quick Analysis – Charts (Windows)

1. Select a range of cells.

2. Select the Quick Analysis button that appears at the bottom right corner of the selected data.

Or, press Ctrl + Q.

File	Home Insert P	age Layout Formulas Data	Review
A1	• 1 × 4	∫∝ Daily rainfall	
1	А	В	0
1 2	Daily rainfall	Particulate	
2	(centimeters)	(micrograms/cubic meter)	6
3	4.1	122	
4	4.3	117	
5	5.7	112	
6	5.4	114	
7	5.9	110	
8	53	114	
9	3.6	128	
10	1.9	137	
11	7.3	104	
12			1
13			13

3. Select Charts.

12	dh		四門	昌	12
tter	Clustere	Clustere	Stacked	Stacked	More

4. Hover over the chart types to preview a chart, and then select the chart you want.

Quick Analysis features save a lot of time when analyzing data and creating graphs.

For detailed steps of the quick analysis new features, click this link to watch short videos at the Microsoft website:

https://support.office.com/en-us/article/analyze-your-datainstantly-9e382e73-7f5e-495a-a8dc-be8225b1bb78

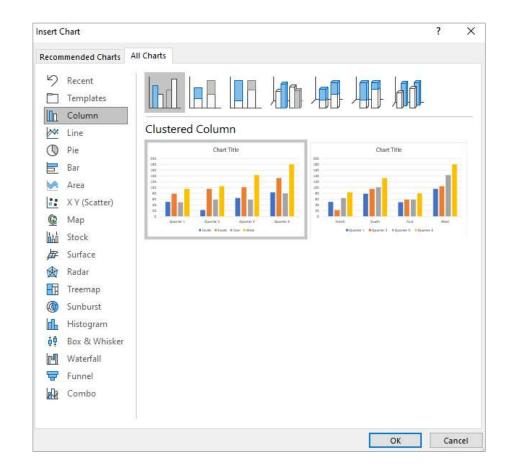


List of Excel Chart Types

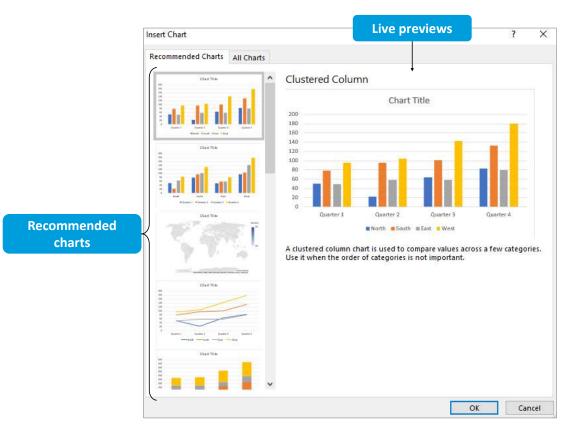
Column

- imes Line
- Pie
- 📕 Bar
- Area
- X Y (Scatter)
- 🖉 Мар
- Stock
- Surface
- 🖄 Radar
- Treemap
- Sunburst
- Histogram
- Box & Whisker
- Waterfall
- 🖶 Funnel
- Combo

Chart Types



Recommended Charts



Dual-Axis Charts



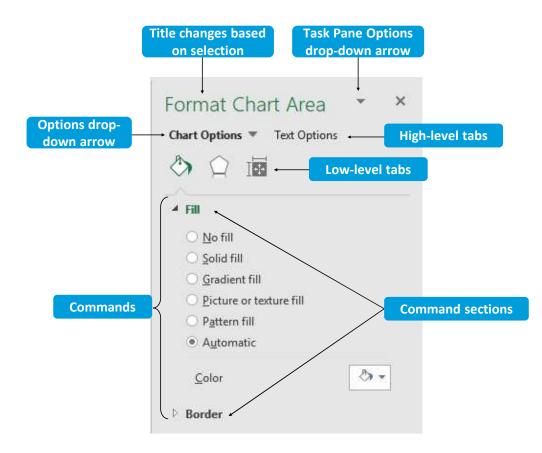
Combo chart: A chart that contains data series of differing chart types.



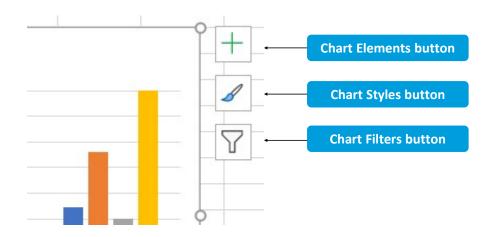
Chart Elements



The Format Task Pane



The Chart Tools Buttons



PivotCharts

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PivotCharts: Graphical representations of numerical values in a PivotTable and relationships among those values.

1	А		В	C	D		E	F		G
3	Sum of Total Sales	Col	umn Labels 🕞		1 	-		· · · · · ·		
4	Row Labels 📃 👻	Mid	dwest	Northeast	Southeast	Sc	outhwest	West	Gr	and Total
5	Anderson	\$	123,808.10	\$ 129,478.30	\$ 118,149.12	\$	91,555.50	\$ 203,747.65	\$	666,738.66
6	Brooks	\$	107,433.43	\$ 117,530.72	\$ 134,949.80	\$	52,105.48	\$ 174,619.46	\$	586,638.88
7	Cooper	\$	195,272.12	\$ 118,659.71	\$ 164,689.90	\$	66,255.71	\$ 166,763.15	\$	711,640.58
8	Powell	\$	134,965.15	\$ 122,076.86	\$ 114,145.24	\$	25, <mark>4</mark> 20.33	\$ 148,436.07	\$	545,043.66
9	Ross	\$	186,446.54	\$ 124,632.56	\$ 186,098.27	\$	39,787.49	\$ 131,173.24	\$	668,138.10
10	Watson	\$	137,833.20	\$ 147,446.58	\$ 143,026.39	\$	36,803.84	\$ 91,580.07	\$	556,690.08
11	Grand Total	\$	885,758.54	\$ 759,824.74	\$ 861,058.71	\$	311,928.35	\$ 916,319.63	\$ 3	3,734,889.96
12	Sum of Total Sales									
13	\$250,000.00									
14	\$250,000.00									
15	\$200,000.00	11			Region -					
16	\$150,000.00				Midwest					
17	\$100,000.00				Northeast					
18					Southeast					
19	\$50,000.00				Southwest					
20	\$-				West					
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The PivotChart Fields Task Pane

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Region		
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Products		
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Total Sales		
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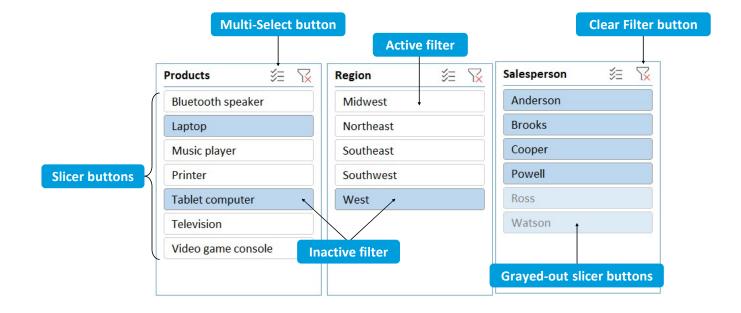
PivotChart Filters

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4	Row Labels 🚽	Mic	west	Northeast	Southeast	Southwest	West	Grand Total
5	Anderson	\$	123,808.10	\$ 129,478.30	\$ 118,149.12	\$ 91,555.50	\$ 203,747.65	\$ 666,738.66
6	Brooks	\$	107,433.43	\$ 117,530.72	\$ 134,949.80	\$ 52,105.48	\$ 174,619.46	\$ 586,638.88
7	Cooper	\$	195,272.12	\$ 118,659.71	\$ 164,689.90	\$ 66,255.71	\$ 166,763.15	\$ 711,640.58
8	Powell	\$	134,965.15	\$ 122,076.86	\$ 114,145.24	\$ 25,420.33	\$ 148,436.07	\$ 545,043.66
9	Ross	\$	186,446.54	\$ 124,632.56	\$ 186,0 <mark>98.2</mark> 7	\$ 39,787.49	\$ 131,173.24	\$ 668,138.10
10	Watson	\$	137,833.20	\$ 147,446.58	\$ 143,026.39	\$ 36,803.84	\$ 91,580.07	\$ 556,690.08
11	Grand Total	\$	885,758.54	\$ 759,824.74	\$ 861,058.71	\$ 311,928.35	\$ 916,319.63	\$ 3,734,889.96
12	Sum of Total Sales							
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14	4000 000 00							
15	\$200,000.00		1.1.	11	Region 💌			
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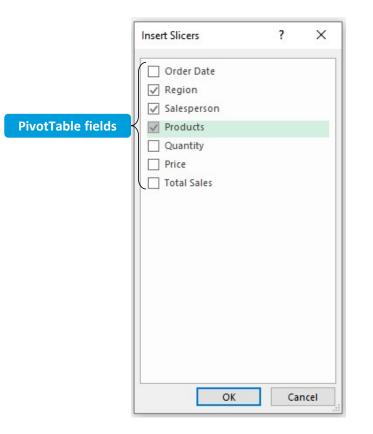
Slicers



Slicers: Individual Excel objects used to filter the data in PivotTables.



The Insert Slicers Dialog Box



The Slicer Contextual Tab

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The Report Connections Dialog Box

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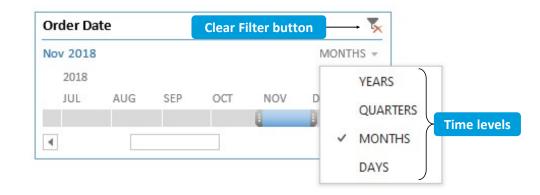
Shared slicers: Slicers that are connected to and that filter multiple PivotTables based on a common dataset simultaneously.

Name	rt reports to connect to thi Sheet	
PivotTable3	Sheet4	
PivotTable4	Sheet5	

Timelines



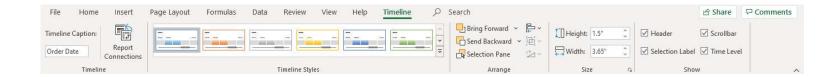
Timelines: Individual Excel objects used to filter date-related data in PivotTables.



The Insert Timelines Dialog Box

Insert Timelines	?	×
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Shipped Date		

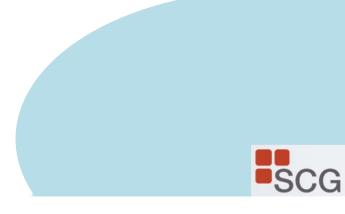
The Timeline Contextual Tab



Planning a Dashboard in Excel

Planning a dashboard in Excel usually involves the following:

- 1. Excel Tables
- 2. Conditional Formatting
- 3. Charts
- 4. Filters or Slicers



Excel Pivot Table, Chart, Slicer

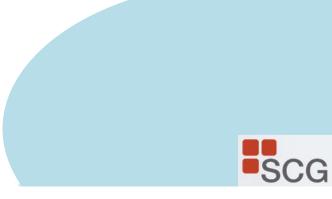
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Row Labels 💌 T			75+ 39	99				AK	AL	AR	AZ	CA	СО	СТ
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22-25	1,887		65-69	594				DC	DE	FL	GA	HI	IA	ID
26-29	1,646		60-64					IL	IN	KS	KY	LA	MA	MD
30-39	838			984										
40-49	1,428	AGE -	50-59				2,639	ME	MI	MN	MO	MP	MS	MT
50-59	2,639		40-49		1,428			NC	ND	NE	NH	NJ	NM	NV
60-64	984		30-39	838						-			-	
65-69	594		26-29		1,646			NY	OH	OK	OR	PA	RI	SC
70-74	366		22-25			1,887		SD	TN	TX	UT	VA	VT	WA
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https://support.office.com/en-us/article/video-create-apivottable-and-analyze-your-data-7810597d-0837-41f7-9699-

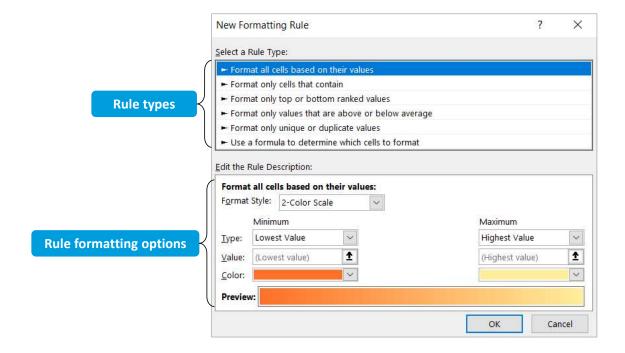
5911aa282760

SCG

Conditional Formatting to Detect Patterns and Anomalies in data



The New Formatting Rule Dialog Box



The Conditional Formatting Rules Manager Dialog Box

	Conditional Formatting Rules M	1anager -			?	\times
	Show formatting rules for:	s Table 🔍 🐱				
	Mew Rule	ule 🛛 🔀 Delete Rule	•			
Formatting miles applied	Rule (applied in order shown)	Format	Applies to		Stop If Tr	ue
Formatting rules applied to the current table	Graded Color Scale		=\$B\$2:\$B\$19	Ţ		
	Above Average	AaBbCcYyZz	= \$E\$2:\$E\$19	1		
			ОК	Cancel	Ap	ply

Rule Precedence

4	A		в		С		D		E		E	G	н	I.	J	- E
1	Sales															
2																
3	Sales Rep	Qua	arter 1	Qua	arter 2	Qui	arter 3	Qua	arter 4	Tot	al					
4	Grace	\$	4,674	\$	3,840	\$	4,272	\$	5,224	\$	18,010					
5	Matthew	\$	3,623	\$	4,871	\$	4,490	\$	5,298	\$	18,282					
6	Daniel	\$	4,345	\$	4,807	\$	4,584	\$	4,606	\$	18,342					
7					12-12 AC	1	and the second								-	
8			Condit	ional	Formatti	ing R	ules Mani	ager							?	×
9			Show f	orma	tting rule	s for:	This W	orkst	eet		~					
10							0.000									
11	5			ew R	ule		Edit Rule.		× Del	ete R	ule	*				
12			Rule (appli	ed in ord	er sho	own) Fo	ormat			Applie	s to		-	Stop If Tru	e
Rule with higher prece	dence		+ 0	ell Va	lue >= 50	000		Aa	BbCcYy	Zz	= \$B\$4:	SE\$6		Ť		
14				-11.1/-	lue > = 4(000		٨	BbCcYy	77	= \$B\$4:	erec		Ť		- 1
15	20		0	eli va	1Ue >= 40	000		Aa	BUCCTY	<i>LL</i>	= 3054;	3530		<u> </u>		- 1
16																- 11
17	s															- 11
18			Rule v	vitł	ו lowe	er p	reced	len	ce							- 11
19																- 11
20	0.20											_		1240		_
21												(ОК	Close	App	Iy
22			L	1		1		_		1					-	_

The Use a Formula to Determine Which Cells to Format Rule (Slide 1 of 2)

New Formatting	g Rule	?	\times
Select a Rule Type			
► Format all cell	s based on their values		
Format only c	ells that contain		
Format only to	op or bottom ranked values		
Format only v	alues that are above or below aver	age	
Format only u	nique or duplicate values		
► Use a formula	to determine which cells to forma	t	
dit the Rule Desc F <u>o</u> rmat values v	ription: where this formula is true:		1
Preview:	No Format Set	Eorm	nat
	ОК	Ca	ncel

The Use a Formula to Determine Which Cells to Format Rule (Slide 2 of 2)

Formula applies formatting to same cell Excel is evaluating

E	Format only t	op or bottom ranked values	
Annual Sales	► Format only v	alues that are above or below	/ average
\$432,653	Format only u	inique or duplicate values	and a second second
\$547,089	🕨 Use a formula	a to determine which cells to f	ormat
\$395,263	Edit the Rule Des	cription:	
\$620,444	The second		
\$392,224	Format values v	where this formula is true:	provide the second s
\$321,015	=\$E2<500000		Ť
\$529,591			
\$534,560			
\$428,643	Preview:	AaBbCcYyZz	<u>F</u> ormat
\$481,062			
		OK	Cancel

Formula applies formatting to different cells than Excel is evaluating

á	A	В	C	D	E	72.	top or bottom ranked values	
1	Salesperson	Employee ID	Start Date	Years w/ Co.	Annual Sales		values that are above or below unique or duplicate values	w average
2	Ernestine	1002	2/25/2005	13.68	\$432,653		la to determine which cells to	format
3	Becky	1001	11/13/2001	16.97	\$547,089	- osc a tonina	a to getermine when eeus to	ronnuc
4	Noah	1007	7/6/2013	5.32	\$395,263	Edit the Rule De	scription:	
5	Bernice	1010	11/13/2005	12.97	\$620,444	Format values	where this formula is true:	
6	Maurice	1008	9/6/2013	5.15	\$392,224	=\$E2<500000		Î
7	Winston	1004	12/13/2004	13.89	\$321,015	-322 500000		- L
8	Glenn	1003	11/11/2009	8.97	\$529,591	-		32
9	Monique	1005	1/2/2003	15.84	\$534,560			
10	Rosie	1009	3/24/2010	8.61	\$428,643	Preview:	AaBbCcYyZz	<u>F</u> ormat
11	Jack	1006	6/19/2006	12.37	\$481,062			
12							0	(Cancel

Cell References and Conditional Formatting (Slide 1 of 2)

2	А	В	C	D	E	 Format only values that are above or below average Format only unique or duplicate values
1	Salesperson	Employee ID	Start Date	Years w/ Co.	Annual Sales	Use a formula to determine which cells to format
2	Ernestine	1002	2/25/2005	13.69	\$432,653	Editates Bude Descriptions
1	Becky	1001	11/13/2001	16.98	\$547,089	Edit the Rule Description:
	Noah	1007	7/6/2013	5.32	\$395,263	Format values where this formula is true:
	Bernice	1010	11/13/2005	12.97	\$620,444	=3032>10
	Maurice	1008	9/6/2013	5.15	\$392,224	
	Winston	1004	12/13/2004	13.89	\$321,015	Preview: AaBbCcYyZz Eormat
1	Glenn	1003	11/11/2009	8.98	\$529,591	
	Monique	1005	1/2/2003	15.84	\$534,560	OK Cancel
D	Rosie	1009	3/24/2010	8.61	\$428,643	
1	Jack	1006	6/19/2006	12.38	\$481,062	

Copied formatting down a column with an absolute reference

Copied formatting down a column with a relative reference

4	A	В	С	D	E	Format only values that are above or below average Format only unique or duplicate values
1	Salesperson	Employee ID	Start Date	Years w/ Co.	Annual Sales	Use a formula to determine which cells to format
2	Ernestine	1002	2/25/2005	13.69	\$432,653	Editate Dela Description
3	Becky	1001	11/13/2001	16.98	\$547,089	Edit the Rule Description:
4	Noah	1007	7/6/2013	5.32	\$395,263	Format values where this formula is true:
5	Bernice	1010	11/13/2005	12.97	\$620,444	=02>10
6	Maurice	1008	9/6/2013	5.15	\$392,224	
7	Winston	1004	12/13/2004	13.89	\$321,015	Preview: AaBbCcYyZz Eormat
8	Glenn	1003	11/11/2009	8.98	\$529,591	
9	Monique	1005	1/2/2003	15.84	\$534,560	OK Cancel
10	Rosie	1009	3/24/2010	8.61	\$428,643	
		1006	6/19/2006	12.38	\$481,062	

Cell References and Conditional Formatting (Slide 2 of 2)

Copied formatting across columns with a relative reference

B2	2 - :	$\times \checkmark f_x$	1002			► Format only cells that contain ► Format only top or bottom ranked values
4	A	В	с	D	E	► Format only values that are above or below average
1	Salesperson	Employee ID	Start Date	Years w/ Co.	Annual Sales	Format only unique or duplicate values Use a formula to determine which cells to format
2	Ernestine	1002	2/25/2005	13.69	\$432,653	
3	Becky	1001	11/13/2001	16.98	\$547,089	Edit the Rule Description:
4	Noah	1007	7/6/2013	5.32	\$395,263	Format values where this formula is true:
5	Bernice	1010	11/13/2005	12.97	\$620,444	<u>=E1>10</u> ±
6	Maurice	1008	9/6/2013	5.15	\$392,224	
7	Winston	1004	12/13/2004	13.89	\$321,015	Preview: AaBbCcYyZz Format
8	Glenn	1003	11/11/2009	8.98	\$529,591	
9	Monique	1005	1/2/2003	15.84	\$534,560	OK Cancel
10	Rosie	1009	3/24/2010	8.61	\$428,643	
11	Jack	1006	6/19/2006	12.38	\$481,062	

Copied formatting across columns with a mixed reference

1	A	В	С	D	E	► Format only values that are above or below average
1	Salesperson	Employee ID	Start Date	Years w/ Co.	Annual Sales	Format only unique or duplicate values Use a formula to determine which cells to format
2	Ernestine	1002	2/25/2005	13.69	\$432,653	
3	Becky	1001	11/13/2001	16.98	\$547,089	Edit the Rule Description:
4	Noah	1007	7/6/2013	5.32	\$395,263	Format values where this formula is true:
5	Bernice	1010	11/13/2005	12.97	\$620,444	= SD2>10
6	Maurice	1008	9/6/2013	5.15	\$392,224	
7	Winston	1004	12/13/2004	13.89	\$321,015	Preview: AaBbCcYyZz <u>F</u> ormat
в	Glenn	1003	11/11/2009	8.98	\$529,591	
9	Monique	1005	1/2/2003	15.84	\$534,560	OK Cancel
0	Rosie	1009	3/24/2010	8.61	\$428,643	
		1006	6/19/2006	12.38	\$481,062	

Guidelines for Applying Conditional Formatting to Cells Based on Values in Other Cells (Slide 1 of 2)

- You must use a formula or a function to define the conditional formatting rule.
- You must enter the formula or function in the Format values where this formula is true field in the New Formatting Rule dialog box.
- The formula or function must begin with an equal sign (=).
- If you are applying the rule to a single cell, you can use either a relative or an absolute reference to the evaluated cell in the formula or function.
- If you are applying the rule to multiple cells in a single column and the rule will be evaluating the data in only a single cell:
 - You must use an absolute reference to the evaluated cell in the formula or function.
- If you are applying the rule to multiple cells in a single column and the rule will be evaluating the associated data stored in multiple rows in another column:
 - You must use a mixed reference that locks the column for the evaluated cells, but that is relative for rows, in the formula or function.

Guidelines for Applying Conditional Formatting to Cells Based on Values in Other Cells (Slide 2 of 2)

- If you are applying the rule to a range that includes multiple rows and columns and the rule will be evaluating the associated data stored in a single cell:
 - You must use an absolute reference for the evaluated cell in the formula or function.
- If you are applying the rule to a range that includes multiple rows and columns and the rule will be evaluating the associated data stored in multiple rows in another column:
 - You must use a mixed reference that locks the column for the evaluated cells, but that is relative for rows, in the formula or function.

4. Analyze Data with Pivot Tables and the Power Pivot Data Model **Custom Calculations PowerPivot Data Model advantages Relate Data** Pivot from multiple data sets Formatting tips **Refresh** settings



Pivoting

	_	
_	_	
		-
	_	
		1

Pivoting: A form of data manipulation that can take a column of data and pivot it into a row and vice versa.

-	A	В	С	D	E	F	G	Н
1	Order Date	State	Item #	Qty	Unit Price	Subtotal	Tax	Total Sale
2	1/2/2018	NJ	B107	24	\$154.95	\$3,672.32	9%	\$4,002.82
3	1/3/2018	CT	T110	11	\$325.00	\$3,672.50	4%	\$3,819.40
4	1/3/2018	RI	TV100	13	\$295.19	\$3,926.03	7%	\$4,200.85
5	1/5/2018	NY	B107	10	\$154.95	\$1,549.50	9%	\$1,688.96
6	1/6/2018	MA	V104	9	\$349.00	\$3,210.80	5%	\$3,371.34
7	1/6/2018	MD	TV100	8	\$295.19	\$2,332.00	7%	\$2,495.24
8	1/6/2018	NY	M105	9	\$285.99	\$2,430.92	9%	\$2,649.70
9	1/8/2018	VT	V110	21	\$349.00	\$7,363.90	4%	\$7,658.46
10	1/9/2018	CT	P109	19	\$99.99	\$1,899.81	4%	\$1,975.80
11	1/9/2018	PA	T110	8	\$325.00	\$2,600.00	7%	\$2,782.00
12	1/10/2018	NY	L110	6	\$329.25	\$1,810.88	9%	\$1,973.85
13	1/12/2018	CT	M103	18	\$285.99	\$5,033.42	4%	\$5,234.76
14	1/12/2018	RI	P102	6	\$99.99	\$579.94	7%	\$620.54
15	1/13/2018	NH	P104	23	\$99.99	\$2,259.77	5%	\$2,372.76
16	1/15/2018	MA	R101	16	\$134.99	\$2,213.84	5%	\$2,324.53
17	1/15/2018	PA	T101	19	\$325.00	\$6,142.50	7%	\$6,572.48
18	1/15/2018	RI	TV104	20	\$295.19	\$6,021.88	7%	\$6,443.41

Original data

Pivoted data

Row Labels 👻	Su	im of Total Sale
СТ	\$	179,235.56
DE	\$	134,693.42
MA	\$	197,966.03
MD	\$	199,693.63
ME	\$	143,031.64
NH	\$	159,095.84
NJ	\$	164,755.56
NY	\$	184,262.65
PA	\$	157,996.73
RI	\$	175,510.78
VT	\$	148,850.53
Grand Total	\$	1,845,092.37

PivotTables

-	 -	
	 -	
	 -	

PivotTable: A dynamic Excel data object that enables users to perform data analysis by pivoting columns and rows of raw data without altering the raw data.

					que entries column are		eadings		
		A	В	С	D	E	F	G	н
The PivotTable entries are a	1								
summary of all sales for	2 3	Sum of Total Sale	Months ,T						
each month of orders	4	State 👻	Jan	Feb	Mar	Apr	May	Jun	Grand Total
across each state	5	СТ	\$ 21,827.79	\$ 27,339.16	\$ 23,981.13	\$ 12,760.16	\$ 21,049.90	\$ 7,479.55	\$ 114,437.6
	6	DE	\$ 15,805.75		\$ 11,690.18	\$ 24,727.29	\$ 5,941.73	\$ 23,188.13	\$ 81,353.0
	7	MA	\$ 13,199.27	\$ 25,562.30	\$ 14,922.81	\$ 16,095.37	\$ 31,989.78	\$ 11,243.55	\$ 113,013.0
	8	MD	\$ 2,495.24	\$ 12,675.08	\$ 17,746.36	\$ 25,025.35	\$ 21,172.35	\$ 21,813.15	\$ 100,927.5
	9	ME	\$ 2,771.60	\$ 12,066.45	\$ 19,777.31	\$ 25,639.82	\$ 10,565.35	\$ 715.99	\$ 71,536.5
	10	NH		\$ 37,407.63	\$ 8,730.60		\$ 27,331.12		\$ 85,772.6
	11	NJ		\$ 11,064.84		\$ 11,456.95	\$ 18,512.23	\$ 5,797.61	\$ 84,400.3
	12	NY	\$ 10,977.98	\$ 17,340.74	\$ 7,122.62	\$ 7,485.22	\$ 8,197.80	\$ 5,747.66	\$ 56,872.0
	13	PA		\$ 11,310.60	\$ 18,038.17				\$ 62,861.4
	14	RI	•	\$ 7,789.73	\$ 4,555.85	-	\$ 18,908.08	-	\$ 92,772.1
	15		\$ 10,887.42	\$ 19,676.37	\$ 15,026.51				\$ 69,770.5
	16	Grand Total	\$ 149,629.26	\$ 182,232.90	\$ 155,415.85	\$ 160,109.43	\$ 176,625.33	\$ 109,704.22	\$ 933,717.0
				ntries from nn are row					

Transactional Data

Transactional data: Data that represents each individual transaction, or event, in a series of transactions, and that is not summarized in any way, shape, or form.

1	A	В	С	D	E	F	G	н	I	1	
1	Date	Time	Store #	Item #	Quantity	Price	Subtotal	Tax	Total Sales	1	\$
2	1/2/2018	22:59	S137	L104	20	\$329.25	\$6,486.23	7%	\$6,940.26	2	9
3	1/2/2018	21:01	S316	V107	21	\$349.00	\$7,398.80	7%	\$7,916.72	3	9
4	1/2/2018	07:33	\$323	TV107	17	\$295.19	\$4,900.15	7%	\$5,243.16	4	5
5	1/2/2018	03:11	S352	T107	10	\$325.00	\$3,347.50	4%	\$3,481.40	5	5
6	1/2/2018	15:06	S404	B107	24	\$154.95	\$3,672.32	9%	\$4,002.82	6	5
7	1/2/2018	16:22	S511	R108	14	\$134.99	\$1,822.37	5%	\$1,913.48	7	5
8	1/3/2018	21:05	S162	T110	11	\$325.00	\$3,672.50	4%	\$3,819.40	8	9
9	1/3/2018	07:02	S253	V109	15	\$349.00	\$5,374.60	6%	\$5,697.08	9	5
10	1/3/2018	04:59	S484	TV100	13	\$295.19	\$3,926.03	7%	\$4,200.85	10	5
11	1/3/2018	16:25	S493	B106	6	\$154.95	\$898.71	7%	\$961.62	11	5
12	1/4/2018	04:06	S212	B106	10	\$154.95	\$1,487.52	5%	\$1,561.90	12	5
13	1/4/2018	04:37	S271	R105	8	\$134.99	\$1,052.92	5%	\$1,105.57	13	5
14	1/4/2018	17:39	\$336	R101	6	\$134.99	\$863.94	5%	\$907.13	14	5
15	1/4/2018	06:36	S563	L101	8	\$329.25	\$2,666.93	7%	\$2,853.61	15	9
16	1/4/2018	12:50	S563	V101	11	\$349.00	\$3,839.00	7%	\$4,107.73	16	5
17	1/5/2018	08:04	S111	M107	16	\$285.99	\$4,690.24	6%	\$4,971.65	17	5
18	1/5/2018	13:19	S155	B100	14	\$154.95	\$2,184.80	4%	\$2,272.19	18	S

Transactional data

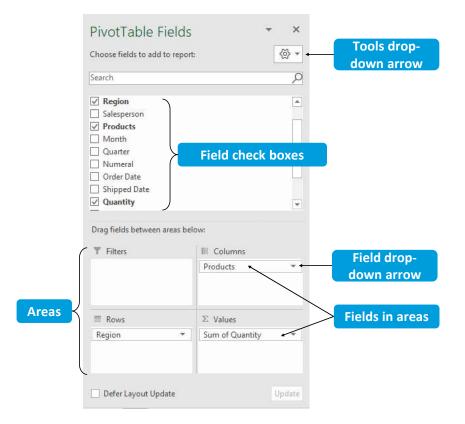
Summarized data

	А	В	с	D
1	Store #	Avg Qty Sold	Avg Price	Total Sales
2	S101	12.9	\$221.32	\$18,033.11
3	S102	17.4	\$236.22	\$27,281.40
4	S103	20.4	\$266.06	\$22,435.28
5	S104	15.4	\$264.50	\$12,171.80
6	S105	16.7	\$233.11	\$34,115.52
7	S106	15.8	\$259.19	\$30,066.48
8	S107	12.8	\$247.88	\$17,097.78
9	S111	9.4	\$270.04	\$14,032.89
10	S112	14.1	\$271.77	\$23,479.52
11	S113	16.7	\$305.89	\$60,857.05
12	S114	12.6	\$276.05	\$15,464.04
13	S115	18.4	\$278.08	\$33,924.89
14	S116	10.9	\$154.95	\$ 3,564.16
15	S117	11.9	\$215.68	\$23,261.96
16	S121	14.7	\$206.58	\$27,011.12
17	S122	17.5	\$312.22	\$11,270.24
18	S123	12.9	\$250.39	\$20,092.18

The Create PivotTable Dialog Box

Create PivotTable		?	×
Choose the data that	you want to analyze		
Select a table or	range		
<u>T</u> able/Range	'Transactional Data'ISAS1:SOS2021	E	1
O Use an external	data source		
Choose Co	nnection		
Connection Use this workbo Choose where you wa New Worksheet	ok's Data Model ant the PivotTable report to be placed		
Location:			Ť
Choose whether you Add this data to	want to analyze multiple tables the Data <u>M</u> odel OK	Ca	ncel

The PivotTable Fields Task Pane



The Value Field Settings Dialog Box

ource Name: Total Cost				
ustom Name: Sum of Total C	ost			
Summarize Values By Show	Values As			
Summarize value field by				
		nt to use	to summa	170
data from the selected field	i that you wa			
	i that you wa			
data from the selected field Sum	i that you wa			
data from the selected field Sum Count	i that you wa			
Count Average Max Min	i that you wa			
data from the selected field Sum Count Average Max				
data from the selected field Sum Count Average Max Min	unat you wa			

urce Name: Total Cost stom Name: Sum of Total	Cost	
Summarize Values By Sh	ow Values As	
– No Calculation		~
Base field:	Base item:	
Date Quarter Region Product	^	^
Rep Sales Price	~	~

SUM

Sum of Total Sal	les Col	umn Labels 🖃]									
Row Labels	- Mi	dwest	No	rtheast	Sou	utheast	So	uthwest	We	st	Gr	and Total
Anderson	\$	123,808.10	\$	129,478.30	\$	118,149.12	\$	91,555.50	\$	203,747.65	\$	666,738.66
Austin	\$	188,287.31	\$	148,298.09	\$	183,735.35	\$	62,406.89	\$	128,036.67	\$	710,764.31
Brooks	\$	107,433.43	\$	117,530.72	\$	134,949.80	\$	52,105.48	\$	174,619.46	\$	586,638.88
Cooper	\$	195,272.12	\$	118,659.71	\$	164,689.90	\$	66,255.71	\$	166,763.15	\$	711,640.58
Powell	\$	134,965.15	\$	122,076.86	\$	114,145.24	\$	25,420.33	\$	148,436.07	\$	545,043.66
Ross	\$	186,446.54	\$	124,632.56	\$	186,098.27	\$	39,787.49	\$	131,173.24	\$	668,138.10
Scott	\$	133,718.36	\$	157,960.38	\$	156,985.35	\$	27,140.63	\$	141,646.94	\$	617,451.65
Watson	\$	137,833.20	\$	147,446.58	\$	143,026.39	\$	36,803.84	\$	91,580.07	\$	556,690.08
West	\$	122,512.21	\$	151,339.21	\$	121,247.06	\$	36,045.86	\$	120,378.62	\$	551,522.96
Grand Total	\$	1,330,276.42	\$:	1,217,422.42	\$:	L,323,026.47	\$	437,521.73	\$:	L,306,381.85	\$ 5	5,614,628.89

Percentage of Total

Sum of Total Sa	ales Column Labels 星]				
Row Labels	 Midwest 	Northeast	Southeast	Southwest	West	Grand Total
Anderson	2.21%	2.31%	2.10%	1.63%	3.63%	11.88%
Austin	3.35%	2.64%	3.27%	1.11%	2.28%	12.66%
Brooks	1.91%	2.09%	2.40%	0.93%	3.11%	10.45%
Cooper	3.48%	2.11%	2.93%	1.18%	2.97%	12.67%
Powell	2.40%	2.17%	2.03%	0.45%	2.64%	9.71%
Ross	3.32%	2.22%	3.31%	0.71%	2.34%	11.90%
Scott	2.38%	2.81%	2.80%	0.48%	2.52%	11.00%
Watson	2.45%	2.63%	2.55%	0.66%	1.63%	9.91%
West	2.18%	2.70%	2.16%	0.64%	2.14%	9.82%
Grand Total	23.69%	21.68%	23.56%	7.79%	23.27%	100.00%

The PivotTable Analyze Contextual Tab

File Home	Insert Page Layout Form	ulas Data Revi	iew View Help	PivotTable Analyze	Design 🔎	Search		🖻 Share 🛛 🖓 Comm	ments
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The Design Contextual Tab for PivotTables



The GETPIVOTDATA Function

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4	A		В	Ļ	с		D		E	9	F		G
3	Sum of Total Sales	Co	lumn Labels 👻										
4	Row Labels 🚽	Mi	idwest	No	ortheast	So	utheast	Sc	outhwest	W	est	Gr	and Total
5	Bluetooth speaker	\$	135,147.39	\$	103,351.65	\$	99,508.89	\$	46,128.61	\$	95,294.25	\$	<mark>479,430.80</mark>
6	Laptop	\$	261,654.98	\$	260,798.93	\$	311,865.60	\$	97,392.15	\$	270,972.75	\$:	1,202,684.40
7	Music player	\$	110,948.28	\$	119,938.62	\$	133,910.08	\$	36,501.30	\$	100,851.03	\$	502,149.30
8	Printer	\$	62,843.72	\$	57,614.24	\$	73,512.65	\$	36,846.32	\$	82,361.76	\$	313,178.68
9	Tablet computer	\$	225,452.50	\$	190,385.00	\$	286,812.50	\$	87,100.00	\$	253,500.00	\$:	1,043,250.00
10	Television	\$	257,996.06	\$	232,727.80	\$	230,631.95	\$	62,845.95	\$	237,952.66	\$:	l,022,154.41
11	Video game console	\$	276,233.50	\$	252,606.20	\$	186,784.80	\$	70,707.40	\$	265,449.40	\$:	1,051, <mark>781</mark> .30
12	Grand Total	\$	1,330,276.42	\$:	1,217,422.42	\$:	1,323,026.47	\$	437,521.73	\$:	1,306,381.85	\$ 5	6,614,628.89
13													
14	Laptop Sales in South	\$	97,392.15										

Protect a Pivot Table so other users cannot change the Pivot Table layout or format

If you plan to send a pivot table file to someone or upload to a Team, you can add sheet protection (with a password). Then no one can modify the pivot table or access the underlying data source. They will be able to click and tap the slicers to run the filtering.

- 1. Select all slicers using the CTRL key to multiple select
- 2. Right click on a Slicer and select Size & Properties
- 3. Under Properties, uncheck the Locked box and press Close
- 4. From the ribbon, select the **Protect Sheet** tool
- 5. Uncheck the Select Locked Cells and check the Select Unlocked Cells & Use Pivot Table Reports
- 6. Optionally, enter a password and press OK

Note: The slicers are not locked and could be altered or deleted.

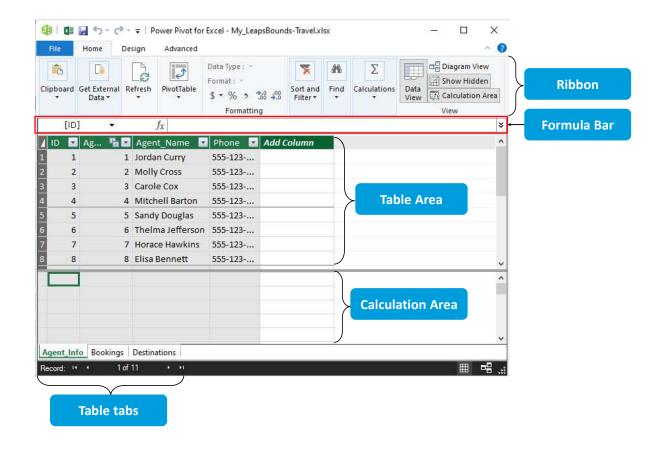
Power Pivot Data Model discussion and Distinct Count vs. Count



The Power Pivot Tab

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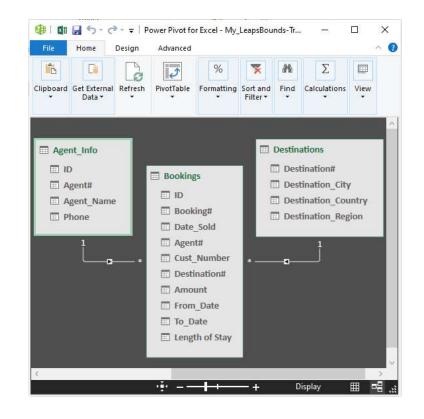
The Power Pivot Window



PowerPivot: Relating Data



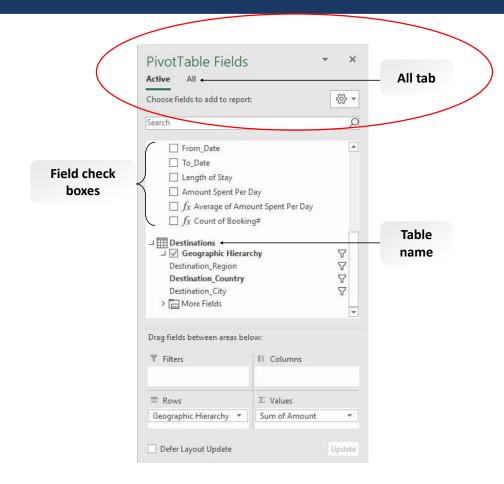
Table Views in the Power Pivot Window



The Home Tab

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The PivotTable Fields Task Pane



5. Excel Power Query (Get and Transform) Combining sets of data manipulating and transforming data unpivoting data



Introduction to Microsoft Power Query for Excel (Get and Transform)

Power Query is used to connect to external data, transform data, and create a data model.

https://support.office.com/en-us/article/Introduction-to-Microsoft-Power-Query-for-Excel-6E92E2F4-2079-4E1F-BAD5-89F6269CD605?omkt=en-US&ui=en-US&rs=en-US&ad=US

Excel Power Query Editor

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Microsoft Excel Update & Tips for CPAs

Thank you for your attendance!

Questions/information/consulting/training: Judy@SCG-Training.com

