

# Basics of Excel in Financial Analysis

## Syllabus

### Course Outcomes

- CO1: Students should know how to create worksheets and workbooks.
- CO2: To apply and customize data formats and layouts.
- CO3: To study table creation and applications in Excel.
- CO4: To understand the operations with formulas and functions.
- CO5: To design charts and objects.

## 1. Manage Workbook Options and Settings

### 1.1 Create Worksheets and Workbooks

- Create a workbook
- Import data from a delimited text file
- Add a worksheet to an existing workbook
- Copy and move a worksheet

### 1.2 Navigate in Worksheets and Workbooks

- Search for data within a workbook
- Navigate to a named cell, range, or workbook element
- Insert and remove hyperlinks

### 1.3 Format Worksheets and Workbooks

- Change worksheet tab color
- Rename a worksheet
- Change worksheet order
- Insert and delete columns or rows
- Change workbook themes
- Adjust row height and column width
- Insert headers and footers

### 1.4 Customize Options and Views for Worksheets and Workbooks

- Hide or unhide worksheets
- Hide or unhide columns and rows
- Customize the Quick Access toolbar
- Modify document properties
- Display formulas

### 1.5 Configure Worksheets and Workbooks for Distribution

- Inspect a workbook for hidden properties or personal information

- Inspect a workbook for accessibility issues
- Inspect a workbook for compatibility issues

## **2. Apply Custom Data Formats and Layouts**

### **2.1 Apply Custom Data Formats and Validation**

- Create custom number formats
- Populate cells by using advanced Fill Series options
- Configure data validation

### **2.2 Apply Advanced Conditional Formatting and Filtering**

- Create custom conditional formatting rules
- Create conditional formatting rules that use formulas
- Manage conditional formatting rules

### **2.3 Create and Modify Custom Workbook Elements**

- Create and modify simple macros
- Insert and configure form controls

## **3. Create Tables**

### **3.1 Create and Manage Tables**

- Create an Excel table from a cell range
- Convert a table to a cell range
- Add or remove table rows and columns

### **3.2 Manage Table Styles and Options**

- Apply styles to tables
- Configure table style options
- Insert total rows

### **3.3 Filter and Sort a Table**

- Filter records
- Sort data by multiple columns
- Change sort order
- Remove duplicate records

## **4. Perform Operations with Formulas and Functions**

### **4.1 Summarize Data by using Functions**

- Insert references
- Perform calculations by using the SUM function
- Perform calculations by using MIN and MAX functions
- Perform calculations by using the COUNT function
- Perform calculations by using the AVERAGE function

#### 4.2 Perform Conditional Operations by using Functions

- Perform logical operations by using the IF function
- Perform logical operations by using the SUMIF function
- Perform logical operations by using the AVERAGEIF function
- Perform statistical operations by using the COUNTIF function

#### 4.3 Format and Modify Text by using Functions

- Format text by using RIGHT, LEFT, and MID functions
- Format text by using UPPER, LOWER, and PROPER functions
- Format text by using the CONCATENATE function

### 5. Create Charts and Objects

#### 5.1 Create Charts

- Create a new chart
- Add additional data series
- Switch between rows and columns in source data
- Analyze data by using Quick Analysis

#### 5.2 Format Charts

- Resize charts
- Add and modify chart elements
- Apply chart layouts and styles
- Move charts to a chart sheet

#### 5.3 Insert and Format Objects

- Insert text boxes and shapes
- Insert images
- Modify object properties
- Add alternative text to objects for accessibility