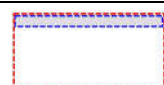
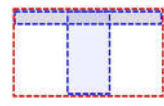


# [Advanced Excel] Masterclass – Revision Notes by [www.yodalearning.com]

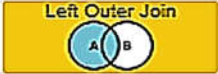
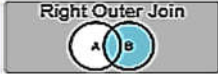

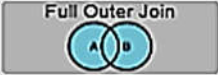

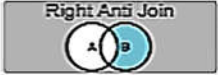
SN	Technique	Description	Remarks
(A) DATA CLEANING			
1	FlashFill (Ctrl E)	Show sample output / pattern – (1) no blank column, (2) three samples, (3) apostrophes for bank account no., IDs, (4) diverse/tough samples	-
2	Go To – Special (Ctrl G)	Ctrl + Enter (to fill Blanks); Constants (hard coded) vs. Formulas	15
3	Find & Replace (Ctrl H)	Wildcard characters (*) and (?); To neutralize, use tilde ~	63-64
4	SUBSTITUTE	Formula version of “Find & Replace”	-
5	Text to Columns	(1) Split text, (2) Cell formats - General vs. Text vs. Date ***; (3) Rectify 22.07.2018 ~ dmy and 20180722 is ~ ymd	67-70
6	Extract characters	LEFT (first n characters), RIGHT (last n characters), MID (n characters from a certain starting point)	71
7	“Cleanse”	TRIM (Yoda Pvt Ltd > Yoda Pvt Ltd), VALUE (Nos. stored as text > No.)	60
8	Check/Validate	LEN (Yoda = 4), SEARCH (start position no. in a cell)	60
(B) LOOKUPS			
9	VLOOKUP “tantrums”	(1) Lookup value in 1 <sup>st</sup> column of table array, (2) F4 and comma, (3) Format = Nos. stored as text vs. General/Number -> Use T2C ***	50
10	VLOOKUP with TRUE / 1	3 conditions – [Slabs] in [≥] [Nos. in Asc. Order]; Used for [Nos./Dates]	51
11	VLOOKUP with 1 MATCH	<ul style="list-style-type: none"><li>2D lookup with 90° table (Cross-tab)</li><li>Junior (MATCH) follows Senior (VLOOKUP)</li></ul>	 53
12	INDEX with 2 MATCH	<ul style="list-style-type: none"><li>T-form / Reverse lookup</li><li>Array (Map) + 1<sup>st</sup> MATCH for row (Vertical) + 2<sup>nd</sup> MATCH for column (Horizontal)</li></ul>	 57
13	Fuzzy Lookup (MS Add-in)	Ctrl + T; Matching same names with different spellings – Rajeev vs. Rajiv	-
(C) AGGREGATORS & LOGICALS			
14	SUMIFS / COUNTIFS	SAME Heights of all Ranges, Use \$ for ranges, “>=”&A1	58-59
15	Running Count	=COUNTIFS(\$A\$1:A1,A1) – Used to lookup for duplicate value	59
16	Logical Statements	<ul style="list-style-type: none"><li>IF(AND(), __, __); IF(OR(), __, __); IFERROR( __, “NA”)</li><li>Logical = TRUE/FALSE; TRUE = 1 and FALSE is 0</li></ul>	72-73
(D) PIVOT TABLE (Alt D P) – 38-48			
17	<div><div><div>1. Options: Classic, Autofit Column</div><div>2. Mathematical Calculations (SUM vs COUNT, %)</div><div>3. Grouping: Dates (Year, Months etc.), Numbers (Slabs)</div><div>4. Heatmap (Conditional Formatting – Color Scale)</div><div>5. Slicer (Color Styles, Increase Columns Nos.)</div><div>6. Sparklines (High Pt. vs. Low Pt.)</div><div>7. F11 (Chart)</div></div><div><div>8. Refresh vs. Change Data Source</div><div>9. Move (headers) ~ Hold, Drag and Drop</div><div>10. Cross-tab to Flat file (PQ – Transform – Unpivot Columns)</div><div>11. Show Filter Pages (100s of Pivot reports)</div><div>12. Disable GETPIVOTDATA</div><div>13. Others: _____</div><div>14. Others: _____</div></div></div>		
(E) CALCULATIONS			
18	EDATE	Expiry Date (3 months from now)	29
19	EOMONTH	End of Month (5 <sup>th</sup> of next month)	29
20	TEXT	“ddd” = Sun, “dddd” = Sunday	27   Alternative: WEEKDAY where 1= Sunday
21	Macros (Google Search)	VBA CODE TO [VERB] [OBJECT] [ADDL. LOGIC]	<ul style="list-style-type: none"><li>Youtube Channel – excelsuperstar</li><li>YodaLearning.com – Free Lessons</li></ul>
22	15-mins RECAP Video	<a href="https://courses.yodalearning.com/p/advanced-excel-masterclass-post-training-recap">https://courses.yodalearning.com/p/advanced-excel-masterclass-post-training-recap</a>	

Extra: (1) MS OneNote: Copy text from picture (OCR), (2) Word Macros: Avoid Delete – Space

## [Power Query] for Report Automation – Revision Notes by [www.yodalearning.com]

Note 1: For 2010 & 2013, download as Add-in (32 vs 64 bit); for 2016 Professional – it's under Data > Get & Transform; for Power BI – Home tab > Edit Queries

Note 2: PQ = Case Sensitive; File Source Name is not dynamic \*\*\*

1	Import Data from a "Folder" (CSV and XLSX)
2	Import Data from the "Web" (e.g. AMFI India - MF NAVs – NAV.txt) + Refresh
3	Filter & Sort
4	Applied Steps = ~Undo; See the Steps' results
5	Home – Merge Queries [horizontal] i.e. add more columns sideways (~VLOOKUP or INDEX) Home – Append Queries [vertical] i.e. add more rows below (~copy paste data below)
6	Queries – "Duplicate" to create multi sub-branches, "Rename" for better identification & reference
7	Home – Remove Rows (Duplicates, Blanks)
8	Transform – Use first row as headers, Fill Down, Split Column, Replace Values, Extract*, Format* (TRIM, CLEAN, Case Change)
9	Transform – Unpivot Columns to convert cross-tab to flat file (~semi-transpose)
10	Transform – Transpose Columns
11	Transform – Pivot Column (flat file to cross tab)
12	Transform – Data Type (~Right Click - Format cells)
13	Transform – Group By (~SUMIFS or COUNTIFS or Pivot Table summarization)
14	Add Column – Column from Examples using Programming by Example or PBE (~FlashFill)
15	Add Column – Custom Columns (~new column with a formula)
16	Add Column – Conditional Columns (~IF) with AND / OR
17	Add Column – Index Column (~Serial Number)
18	Right-click on Query > Load to > [Connection] + [Add this data to Data Model] >>> Insert Pivot Table with source as "Connection" button
19	<p>JOIN Types in Merge Queries - e.g. [Invited vs Present in an Event] OR [Own Catalog vs Phy. Stock] OR [Popular Products vs Out of Stock]:</p> <div style="display: flex; align-items: flex-start;"> <div style="display: flex; flex-wrap: wrap; gap: 10px;"> <div style="text-align: center;">  <p>Left Outer Join</p> </div> <div style="text-align: center;">  <p>Right Outer Join</p> </div> <div style="text-align: center;">  <p>Inner Join</p> </div> <div style="text-align: center;">  <p>Full Outer Join</p> </div> <div style="text-align: center;">  <p>Left Anti Join</p> </div> <div style="text-align: center;">  <p>Right Anti Join</p> </div> </div> <div style="margin-left: 20px;"> <p><b>Left Outer (all from first, matching from second)</b></p> <p><b>Right Outer (all from second, matching from first)</b></p> <p><b>Full Outer (all rows from both)</b></p> <p><b>Inner (only matching rows)</b></p> <p><b>Left Anti (rows only in first)</b></p> <p><b>Right Anti (rows only in second)</b></p> </div> </div>
20	Trick to get List of all <b>M-Query</b> commands: New Query > Other Sources > Blank Query > <b>=#shared</b> > Convert into Table
21	

\* also present in the ADD COLUMN tab