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Microsoft Excel

An approach to Excel documents that works for Secretaries, Partners, IT and Trainers alike.

From best practises and guidance on approaches to the red herring of formulas.



Next

AGENDA

- **Data v Summary**
- **5 rules of Excel**
- **BODMAS - Always and forever**
- **Data Quality Control**
- **Best Practise Hints and Tips**
- **Close**



Next

What is the objective of an Excel document?

What does the client and partner need from an Excel document?

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

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Objective of an Excel document?

- 1 **Summarise** data
- 2 **Validation** of data
- 3 **Graphical** representation of data
- 4 **Display** of data
- 5 **Collation** of data

Next

- 1 **Summary** of data
- 2 **Validation** of data
- 3 **Graphical** representation of data
- 4 **Display** of data
- 5 **Collation** of data

- Filter, Pivot Table
- Data Validation
- Chart, Pivot Chart
- Freeze, Data cleanse, Dedupe
- Data Validation, Protection

Next

Objective, Goal, Purpose, End game:

Show me relevant information, in a meaningful manner

List of data



- 
1.
 2.
 3.
 4.
 5.

5 Rules of a data list

As a best practise all data should be structured in a list, therefor they are 5 rules of Excel

List Example

1. Header
2. Unique Header
3. Formatted Header
4. Clear Row
5. Clear Column

5 Rules of a data list

As a best practise all data should be structured in a list, therefore there are 5 rules of Excel

First Name	Last Name	Hire Date	Department	Position	Gender	Mgmt Level	Annual Salary	Performance Rating
Catherine	Flour	19/03/1999	Corporate Management	OMP	Female	1	£55,500	3
Debbie	Kuhr-Jones	13/03/1984	Corporate Management	Senior Partner	Female	2	£60,000	2
Alice	White	05/01/1997	Corporate Management	Partner	Female	2	£65,000	4
Maria	Abbott	18/10/1993	Corporate Management	Partner	Female	2	£70,000	2
Elizabeth	Jones	01/02/1996	Corporate Management	Partner	Female	1	£85,000	5
Eileen	Moore	10/02/1994	Corporate	Location Head	Female	2	£45,000	3
Katherine	Jones	29/04/1999	Corporate	Porter	Female	3	£55,000	2
Evelyn	Smith	10/01/1992	Corporate	Senior Associate	Female	3	£55,000	4
Tyler	Brown	05/09/1994	Corporate	Associate	Female	3	£65,000	3
Liz	Davies	01/02/2008		Trainee	Female	5	£40,000	6
Patricia	Dean	21/06/1996	Management Staff	Accounting Staff	Female	3	£48,000	3
Lois	Green	02/05/1994	Facilities	Office Manager	Female	2	£42,000	4
Jim	Johnson	02/01/1996	Corporate Manager	Office Manager	Male	2	£58,000	5
Robert	Jacobs	01/03/1998	Litigation	Location Head	Male	2	£42,000	4
Patrick	Innes	12/03/1998	Litigation	Partner	Male		£48,000	4
David	Albert	07/04/1986	Litigation	Associate	Male	3		4
John	Kim	03/03/1999	Litigation	Associate	Male	3	£57,500	1
Michael	Cole	06/02/1997	Finance & Projects	Partner	Male	2	£42,000	3
Louis	Tykes	24/05/1996	Finance & Projects	Senior Associate	Male	3	£45,000	3
Mike	Myers	08/02/1999	Finance & Projects	Associate	Male	3	£55,000	2
Keith	William	07/07/2006	IT	IT Manager	Male	3	£48,000	3
George	Feake	01/08/1994	IT	IT Service Desk Advisor	Male	3	£46,000	3
Goran	Ivans	05/04/1995	IT Learning	IT Learning Manager	Male	3	£47,500	2
Michael	Martin	15/02/1998	IT Learning	IT Learning Consultant	Male	3	£48,000	3

BODMAS - Always and forever

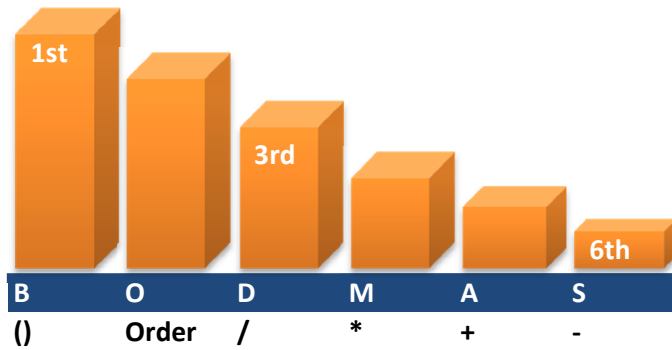
Next

B O D M A S

Next

<i>Bracket</i>	<i>Of</i>	<i>Divide</i>	<i>Multiplication</i>	<i>Addition</i>	<i>Subtraction</i>
B	O	D	M	A	S
()	Order	/	*	+	-

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Additional hours worked on a matter

Associates	4
Snr Associates	2
Average Rate	£200

$$=2+4*200$$

$$=200*2+4$$

$$=(2+4)*200$$

Next

Additional hours worked on a matter

Associate 4
Snr Associate 2
Average Rate £200

=2+4*200 **£802**
=200*2+4 **£404**
=(2+4)*200 **£1,200**

Best Practise
£802
£404
£1,200

Next

Data Quality Control

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

Next

Data Quality Control

- 1 Data Validation - Pre and post data entry _____
- 2 Cell Protection _____
- 3 Sheet Protection _____
- 4 Book Protection _____
- 5 Document Protection _____

- 6 Conditional Formating

Qtr 1 Revenue

Partner	January	February	March
James	£ 23,598.00	£ 49,012.00	£ 50,987.00
Hill	£ 4,356.00	£ 87,120.00	£ 46,890.00
Smith	£ 43,112.00	£ 50,971.00	£ 12,345.00
Khan	£ 34,571.00	£ 87,234.00	
	£ 105,637.00	£ 274,337.00	£ 110,222.00

Contract Dates

Client	Initial	Review	Renewal
AAK LLP			
Jones & Co			
Jamie O		15.10.2014	
Pear			

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Top five quick hints and tips

1. Format columns not cells
2. Build separate lists from reports or calculations
3. Protection - Validate - Conditional Format - Cell, Sheet, Book
4. Always build dynamic formulas and functions
5. Calculate columns not cells



