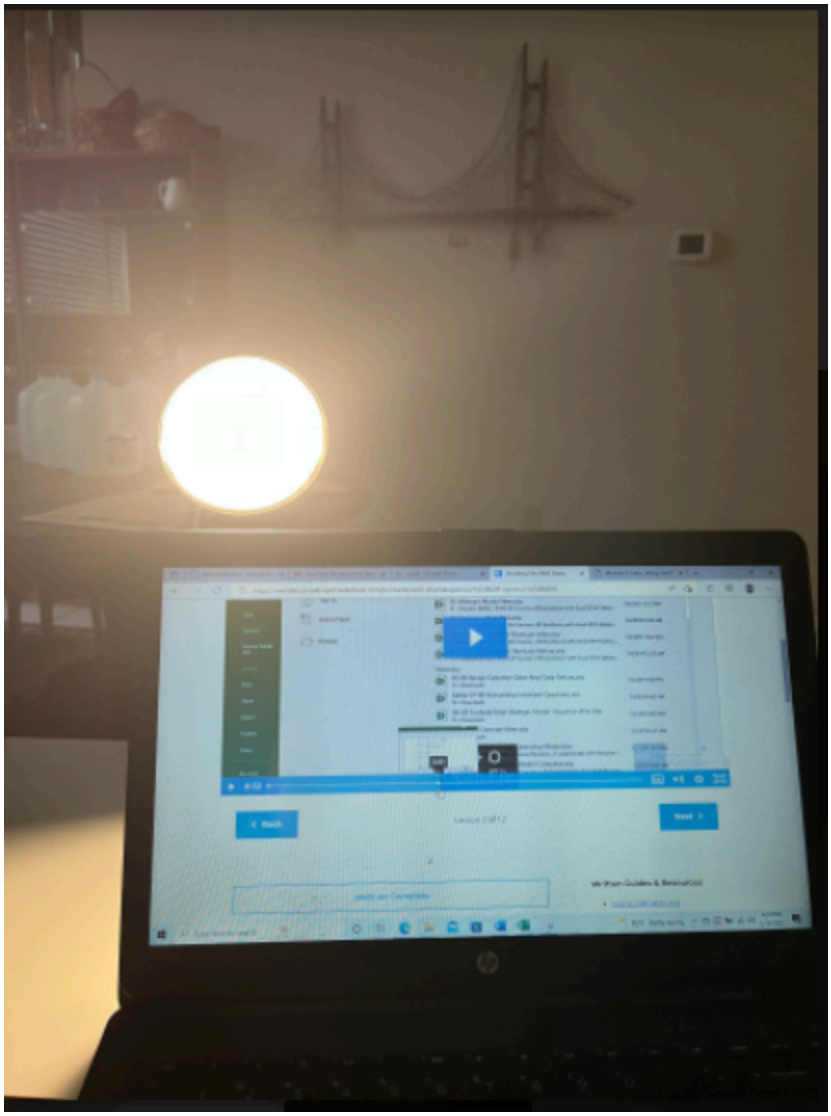
Excellence with Excel 3.0 (PC/Windows Tutorials):

Course Overview and How to Save Hours of Time in 5 Minutes with the Quick Access Toolbar (QAT)

Wall Street



This Course: Should You Complete This Module?

- **This Module:** This is for the *PC or Windows version of Excel* – we now cover the Mac version separately in the first 2 modules
- **Works For:** Desktop, one-time-purchase versions of Excel; the subscription-based Excel 365; and PC versions of Excel run through Parallels on the Mac
- **Minimum Version:** Can complete most of this course in Excel 2007 or 2010, but ideally you'll have 2013 or higher... or Excel 365 (the videos in this course use Excel 2019 or Excel 365)

This Course: Why Excel?

- Probably the **single most important program** in any finance role, even those that involve programming or "real math"



- If you *don't* know Excel, you are going to spend many hours in misery fumbling through work, and your bonus will suffer



- You use Excel for **financial models** and **data analysis** in the finance roles covered on this site (investment banking, private equity, hedge funds, equity research, corp. dev.)

Walmart

- So, you'll learn Excel via two case studies: a **financial model and valuation of Walmart**, and an **analysis of customer order data**



This Course: How Should You Learn Excel?

- **Most** lessons in this course have an exercise at the end, or simply walk you through a tutorial (check the Table of Contents)



- **Exercise:** Watch the video up through the Exercise, download the "Before" and "After" files, compare them, try to complete it yourself, and then watch the solution in the video



- **No Exercise:** Download the "Before" and "After" files first, compare them, watch the video, and then try to replicate those steps



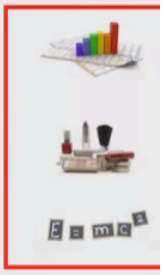
- **Also:** Practice quiz at the end of each module and Certification Quiz at the end of the entire course



This Course: How Should You Learn Excel?

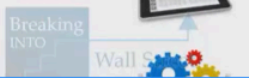
- **To Save Time:** Take a look at the "Course Highlights and Quick Start" Quick Reference Guide in this lesson for tips and study plans
- **High Level:** If you only have a few days (or less), focus on Modules 1 – 3 and skip most of Modules 4 and 5 and all of Module 6
- **Why:** You *really* need to know navigation, formatting, and formulas, but the data analysis, graph, and VBA/macro parts are less important, and the shortcuts there are less relevant







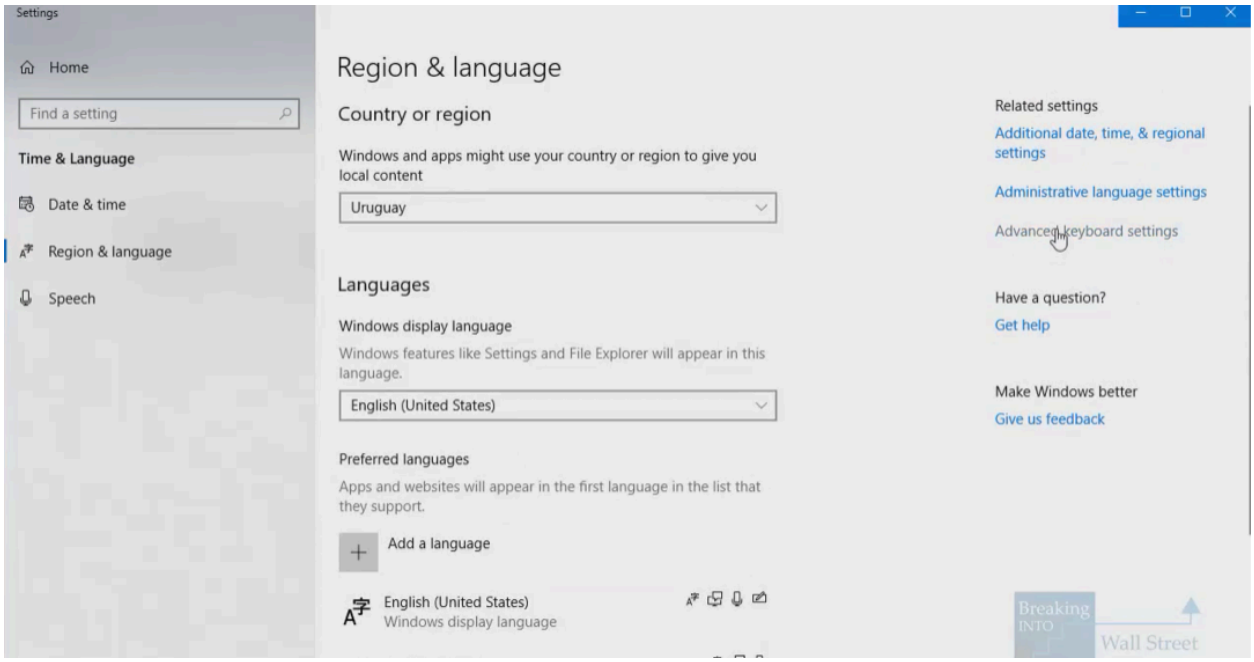


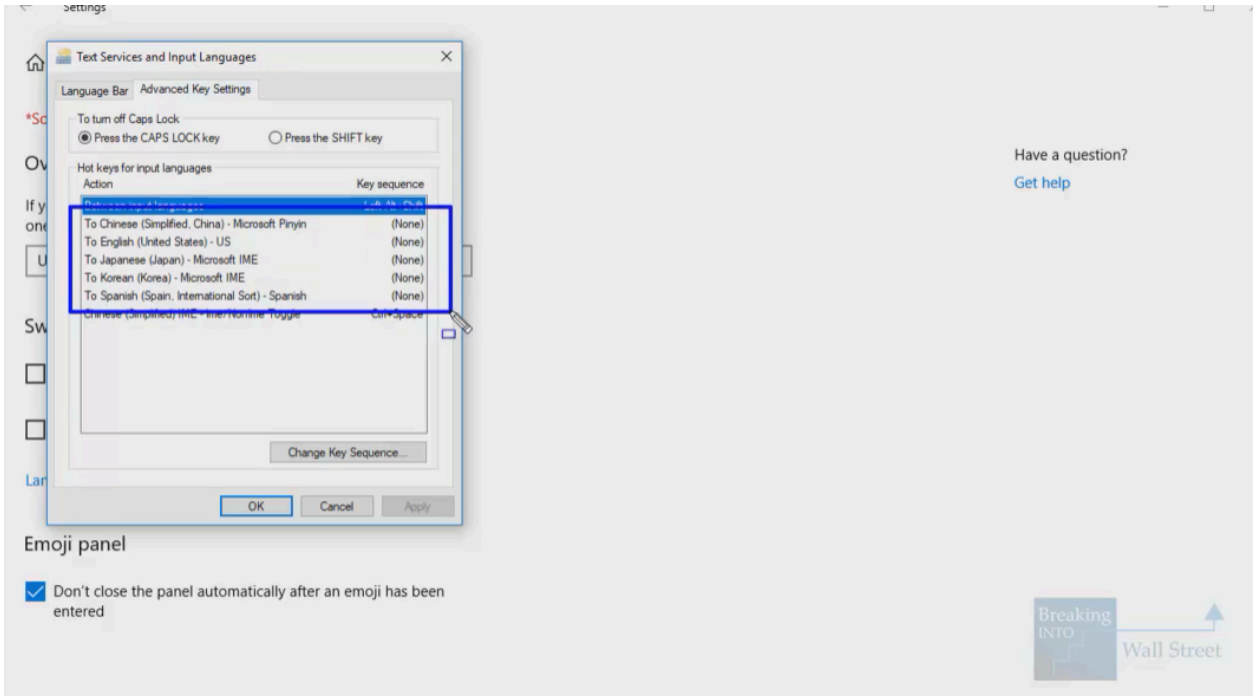


Excel Setup 101: Computer Settings

- **See** the Quick Reference Guide for the full details… summary:
- **Disable** Scroll Lock and the Language Bar, and ideally use the English-language version of Excel




Settings
Home
Find a setting
Time & Language
Date & time
Region & language
Speech
Region & language
Country or region
Windows and apps might use your country or region to give you local content
Uruguay
Languages
Windows display language
Windows features like Settings and File Explorer will appear in this language.
English (United States)
Preferred languages
Apps and websites will appear in the first language in the list that they support.
Add a language
English (United States)
Windows display language
Related settings
Additional date, time, & regional settings
Administrative language settings
Advanced keyboard settings
Have a question?
Get help
Make Windows better
Give us feedback
Breaking INTO Wall Street


Settings
Text Services and Input Languages
Language Bar
Advanced Key Settings
To turn off Caps Lock
Press the CAPS LOCK key
Press the SHIFT key
Hot keys for input languages
Action
Key sequence
To Chinese (Simplified, China) - Microsoft Pinyin (None)
To English (United States) - US (None)
To Japanese (Japan) - Microsoft IME (None)
To Korean (Korea) - Microsoft IME (None)
To Spanish (Spain, International Sort) - Spanish (None)
Change Key Sequence...
OK
Cancel
Apply
Emoji panel
Don't close the panel automatically after an emoji has been entered
Have a question?
Get help
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Excel Setup 101: Computer Settings

- **See** the Quick Reference Guide for the full details… summary:
- **Disable** Scroll Lock and the Language Bar, and ideally use the English-language version of Excel



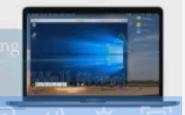
- **Laptops:** If your F2, F4, etc. keys do not work, read the Guide

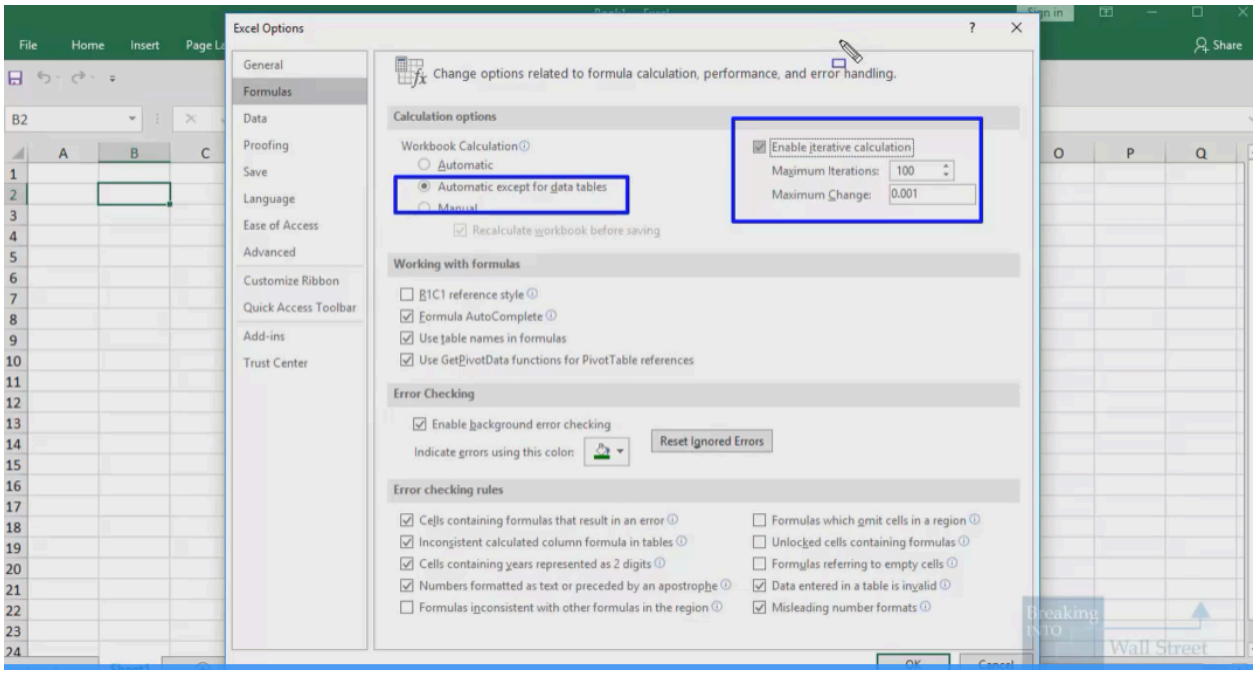


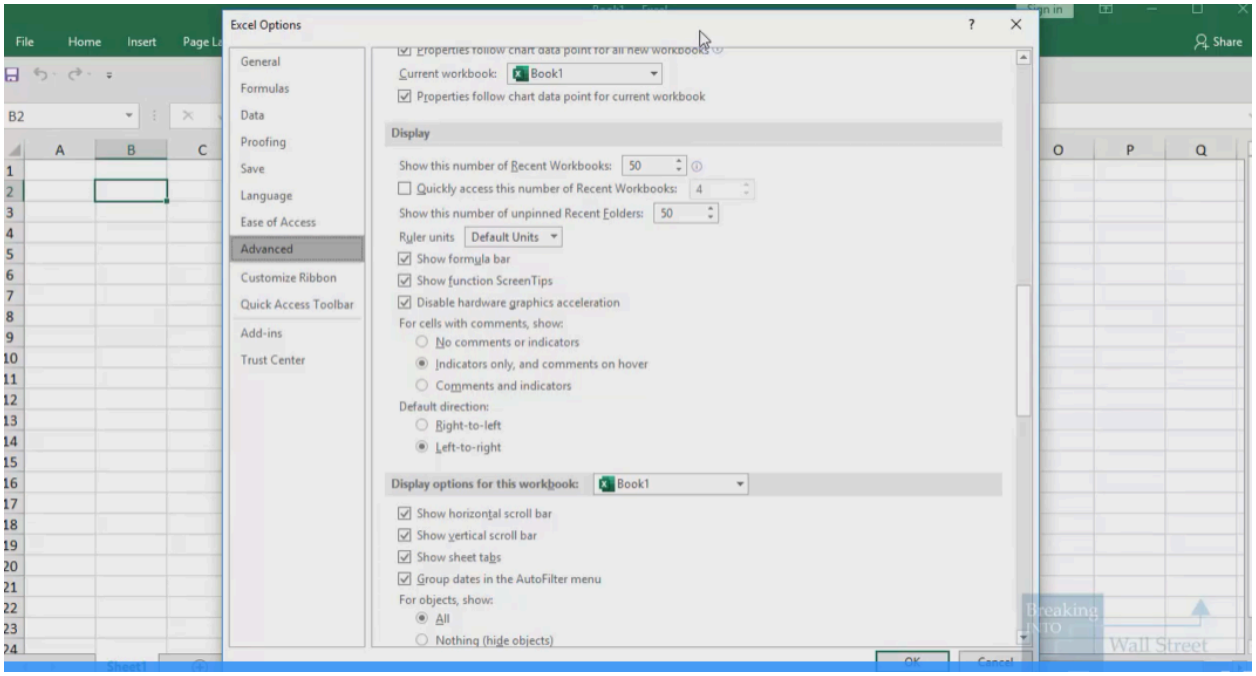
- **Setup:** Ideally, you'll use an **external keyboard and a mouse**; if not, at least get an external mouse

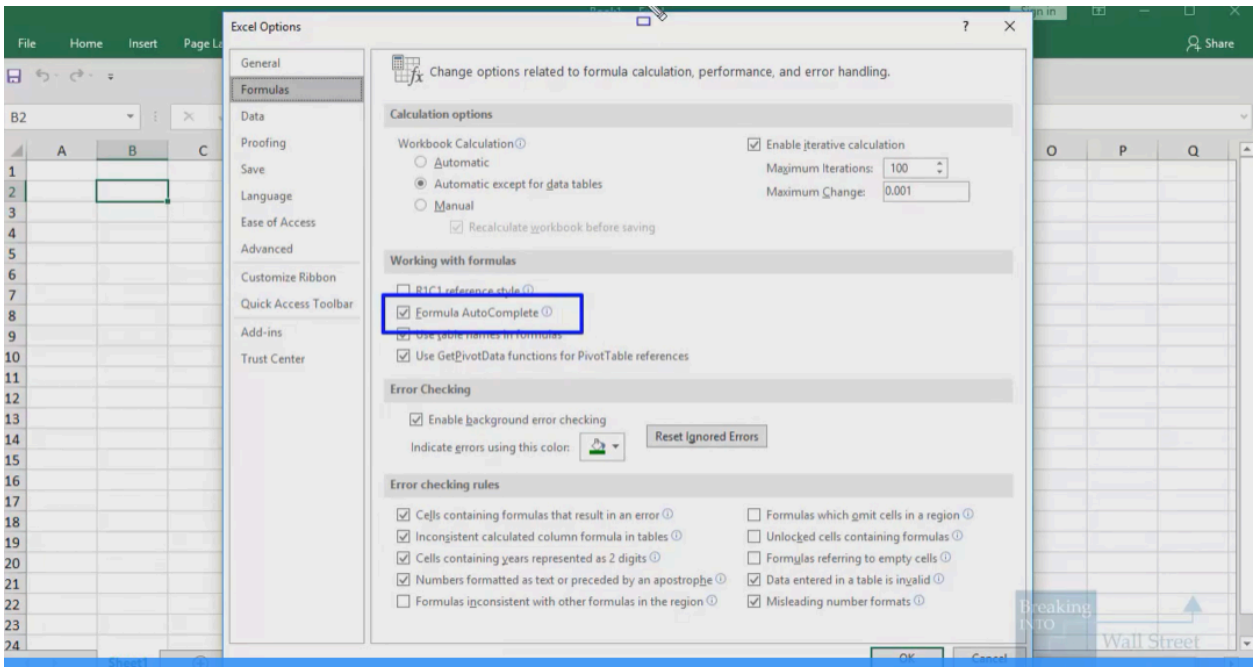


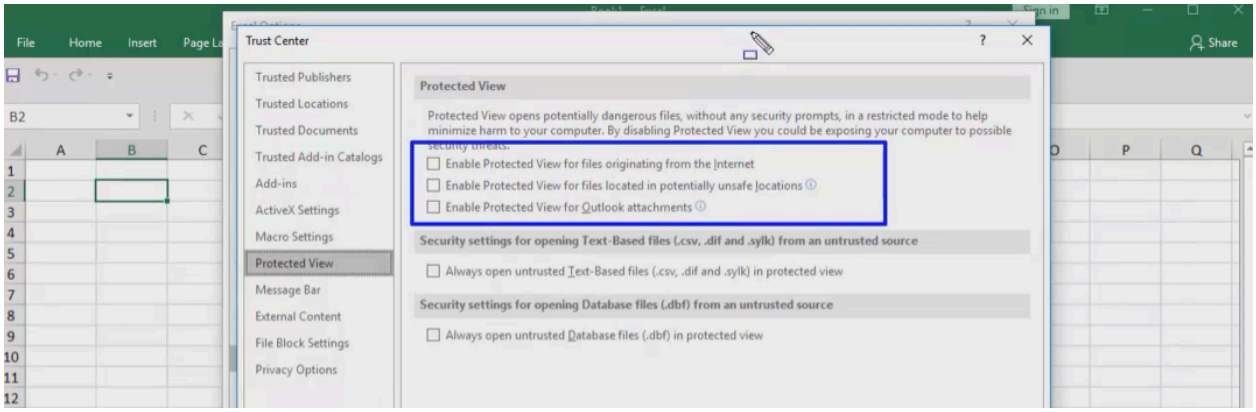
- **Parallels:** PC/Mac mix presents many issues – see the Quick Reference Guide for some setup tips

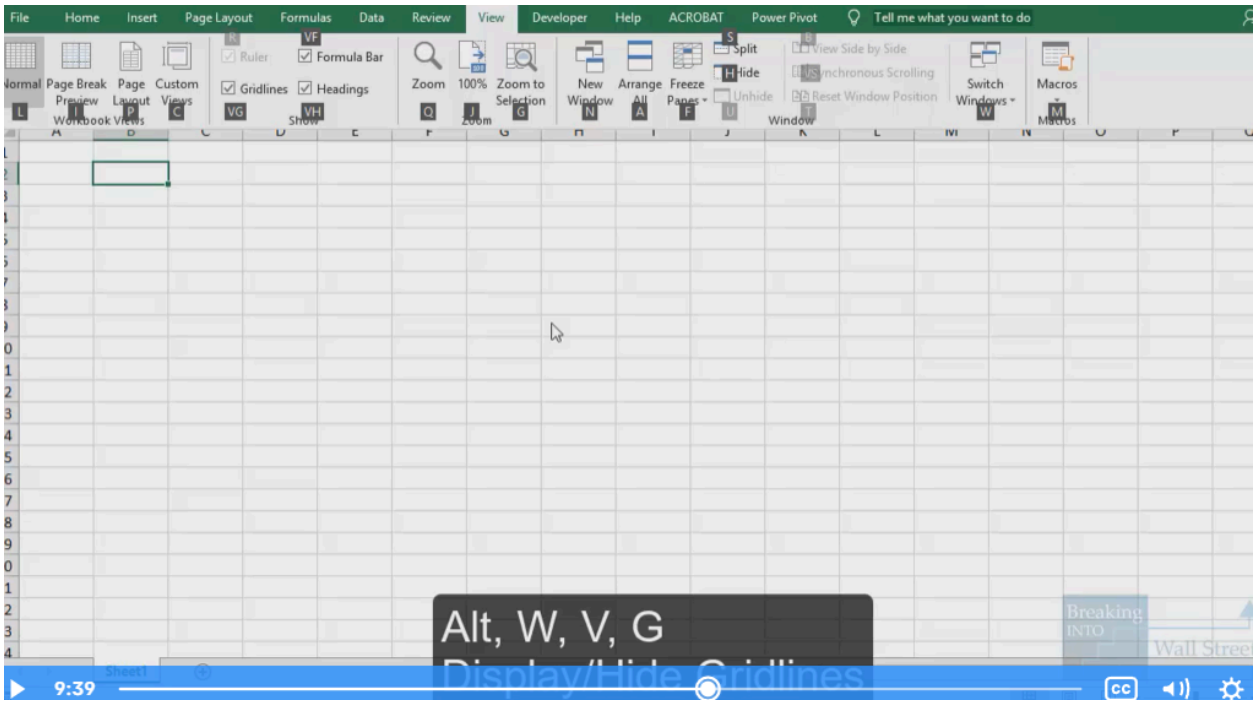





Excel Options
General
Formulas
Data
Proofing
Save
Language
Ease of Access
Advanced
Customize Ribbon
Quick Access Toolbar
Add-ins
Trust Center
Current workbook: Book1
Properties follow chart data point for current workbook
Display
Show this number of Recent Workbooks: 50
Quickly access this number of Recent Workbooks: 4
Show this number of unpinned Recent Folders: 50
Ruler units: Default Units
Show formula bar
Show function ScreenTips
Disable hardware graphics acceleration
For cells with comments, show:
No comments or indicators
Indicators only, and comments on hover
Comments and indicators
Default direction:
Right-to-left
Left-to-right
Display options for this workbook: Book1
Show horizontal scroll bar
Show vertical scroll bar
Show sheet tabs
Group dates in the AutoFilter menu
For objects, show:
All
Nothing (hide objects)
OK
Cancel

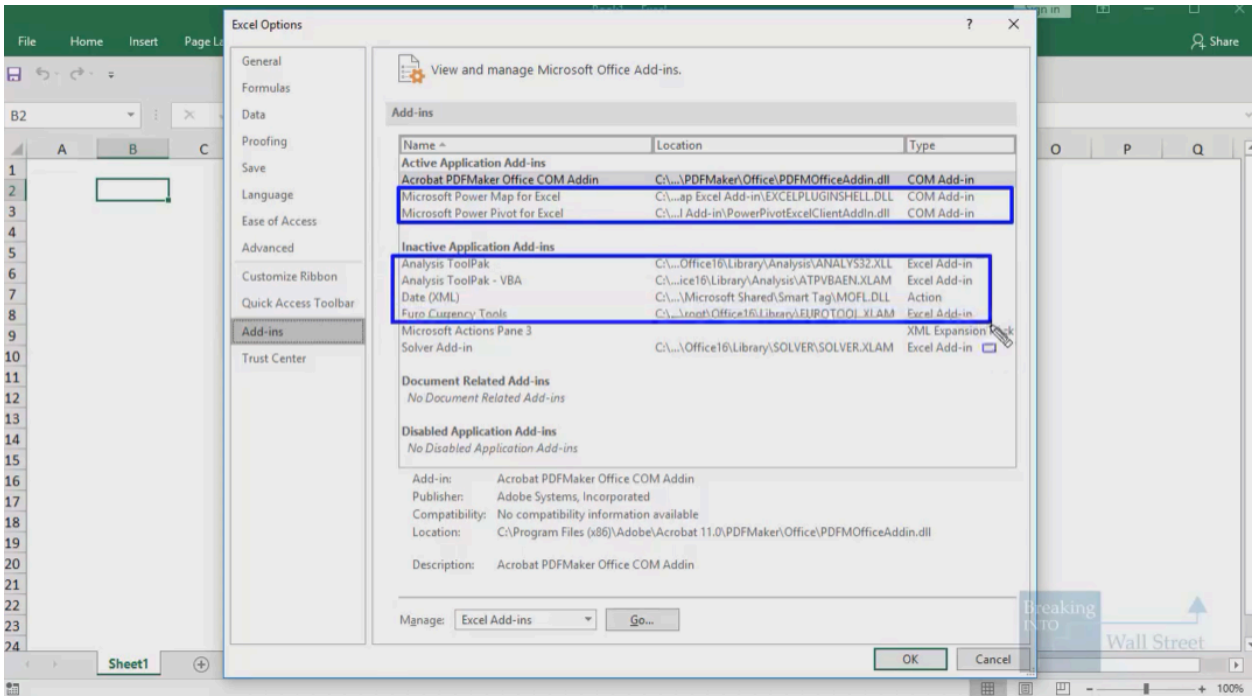

Excel Options
General
Formulas
Data
Proofing
Save
Language
Ease of Access
Advanced
Customize Ribbon
Quick Access Toolbar
Add-ins
Trust Center
Change options related to formula calculation, performance, and error handling.
Calculation options
Workbook Calculation
Automatic
Automatic except for data tables
Manual
Recalculate workbook before saving
Enable iterative calculation
Maximum Iterations: 100
Maximum Change: 0.001
Working with formulas
R1C1 reference style
Formula AutoComplete
Use GetPivotData functions for PivotTable references
Error Checking
Enable background error checking
Indicate errors using this color:
Reset Ignored Errors
Error checking rules
Cells containing formulas that result in an error
Inconsistent calculated column formula in tables
Cells containing years represented as 2 digits
Numbers formatted as text or preceded by an apostrophe
Formulas inconsistent with other formulas in the region
Formulas which omit cells in a region
Unlocked cells containing formulas
Formulas referring to empty cells
Data entered in a table is invalid
Misleading number formats
OK
Cancel


File
Home
Insert
Page La
Share
Trust Center
Trusted Publishers
Trusted Locations
Trusted Documents
Trusted Add-in Catalogs
Add-ins
ActiveX Settings
Macro Settings
Protected View
Message Bar
External Content
File Block Settings
Privacy Options
Protected View
Protected View opens potentially dangerous files, without any security prompts, in a restricted mode to help minimize harm to your computer. By disabling Protected View you could be exposing your computer to possible security threats.
Enable Protected View for files originating from the Internet
Enable Protected View for files located in potentially unsafe locations
Enable Protected View for Outlook attachments
Security settings for opening Text-Based files (.csv, .dif and .sylk) from an untrusted source
Always open untrusted Text-Based files (.csv, .dif and .sylk) in protected view
Security settings for opening Database files (.dbf) from an untrusted source
Always open untrusted Database files (.dbf) in protected view


File
Home
Insert
Page Layout
Formulas
Data
Review
View
Developer
Help
ACROBAT
Power Pivot
Tell me what you want to do
Normal
Page Break Preview
Page Layout
Custom Views
Workbook Views
Ruler
Gridlines
Formula Bar
Headings
Show
Zoom
100%
Zoom to Selection
Zoom
New Window
Arrange All
Freeze Panes
Split
Hide
Unhide
View Side by Side
Synchronous Scrolling
Reset Window Position
Window
Switch Windows
Macros
Alt, W, V, G
Display/Hide Gridlines
9:39

Excel Setup 101: Excel Settings

- **Settings (Alt, T, O)** – Under Formulas, set Workbook Calculation to "Automatic except for data tables" and enable iterative calculations
- **Others:** Disable Hardware Acceleration, don't move cursor after entering something, Autocomplete for Formulas, disable "Protected View" within Trust Center, and disable Gridlines (Alt, W, V, G)
- **Add-Ins / Plugins:** We are not going to teach external add-ins for Excel in this course – yes, they can be useful, but they also have some downsides and may create problems / bad habits



Excel Setup 101: Excel Settings

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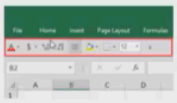
- **Add-Ins / Plugins:** We are not going to teach external add-ins for Excel in this course – yes, they can be useful, but they also have some downsides and may create problems / bad habits

- **But:** You will learn how to *create your own* add-ins later on

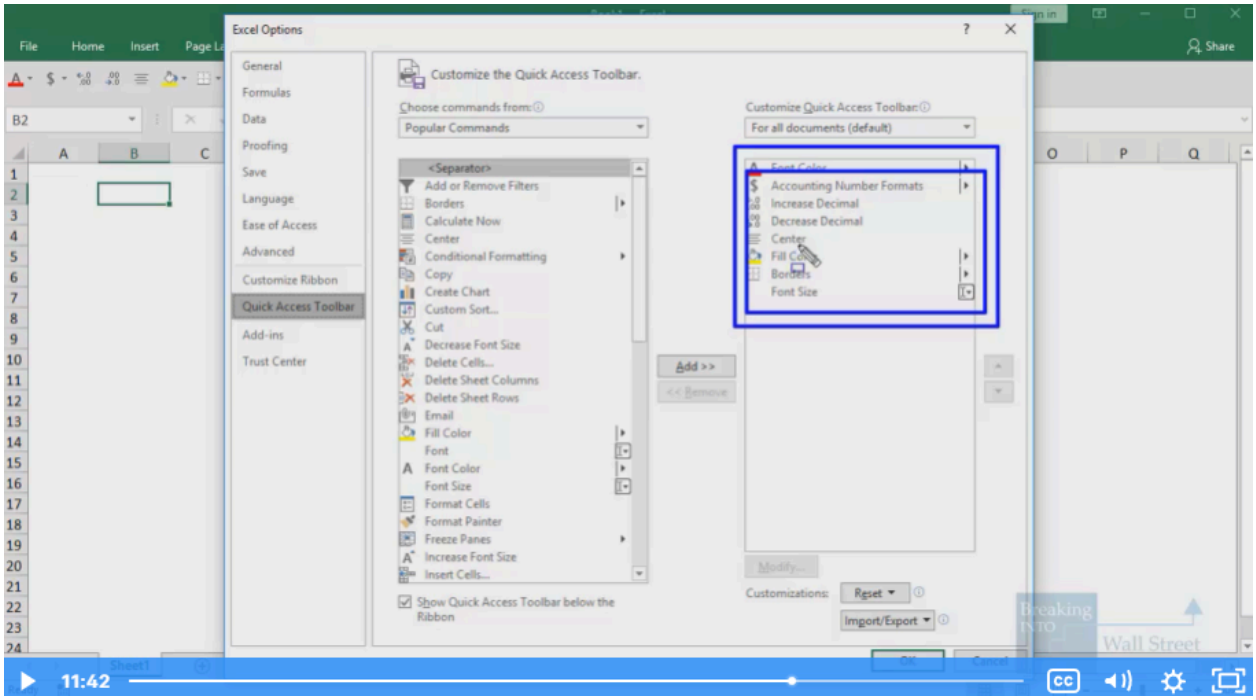
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Quick Access Toolbar: How to Set It Up

- **Quick Access Toolbar (QAT):** Lets you build *faster / shorter* versions of cumbersome shortcuts or commands that lack shortcuts

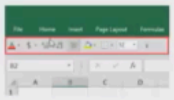


- **Options (Alt, T, O) → Quick Access Toolbar:** Modify it here



Quick Access Toolbar: How to Set It Up

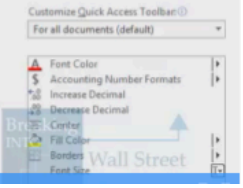
- **Quick Access Toolbar (QAT):** Lets you build *faster / shorter* versions of cumbersome shortcuts or commands that lack shortcuts



- **Options (Alt, T, O) → Quick Access Toolbar:** Modify it here

- **Download Our Version:** Excel-QAT-Export.exportedUI and then Import it into your version of Excel

- **If It Doesn't Work:** Set it up yourself! Go to Options, Quick Access Toolbar, display "All Commands," and add them manually



Quick Access Toolbar: How Much Does It Help?

- **Font Color:** Alt, H, F, C → Alt, 1
- **Accounting Number Format:** Alt, H, N, A → Alt, 2
- **Increase Decimal:** Alt, H, 0 → Alt, 3
- **Decrease Decimal:** Alt, H, 9 → Alt, 4
- **Center / Uncenter:** Alt, H, A, C → Alt, 5
- **Fill Color:** Alt, H, H → Alt, 6
- **Borders:** Alt, H, B → Alt, 7
- **Font Size:** Alt, H, F, S → Alt, 8

- This may not seem like much, but imagine entering these shortcuts *thousands of times **per day*** – it adds up!

Breaking INTO Wall Street

Recap and Summary

1. **This Course:** Who's it for, what you'll learn, and the best way to complete lessons, test yourself, and retain the information



2. **Excel Setup 101:** Key points for Windows/PC system setup and settings within Excel (but refer to the Quick Reference Guide!)



3. **Quick Access Toolbar:** How to set up custom keyboard shortcuts that will save you hours of time… with about 5 minutes of work

