

# Excel Introduction

## 1 Day (9am to 4pm)

### Course Description

This course shows you the basics of how Excel can calculate budgets and financial projections for you by teaching you how to create a small spreadsheet from the beginning of a blank page to the end of saving and printing a professional-looking document. If you've never used Excel before, or have only used it to fill in spreadsheets that other people have created for you, this is the course for you. This course is also suitable for people who are new to Microsoft Office in general and are looking for someplace to start.

**Course Prerequisite:** Knowledge of basic Windows use and ability to use keyboard and mouse.

### Topics Covered

#### Worksheet Entries

Rules For Entering Data  
Deleting Cell Contents  
Editing Cell Entries  
Moving Around A Worksheet  
Selecting Cells (Short Cuts)

#### Formulas

Entering A Basic Formula  
Operators  
Using Functions For Sum & Average

#### Spreadsheet Formatting

Setting Column Widths  
Setting Row Heights  
Choosing Number Formats  
Date Formats & Custom Date Formats  
Setting Decimal Places, Negative Display  
Aligning Entries In Cells – Left, Centre, Right  
Centering A Heading  
Using Paste Special

#### Copy, Move, & Fill

Drag & Drop  
Clipboard Cut, Copy, & Paste  
Using Paste Special  
Using Fill To Automate Entering Months, Days, Numbers, And To Copy Formulas

#### Inserting & Deleting

Columns  
Rows  
Partial Columns And Rows

#### Cell Formatting

Changing Font  
Bold, Italic, Underline, Font Colour, etc.  
Applying Borders  
Filling Cells with Colour

#### Files

Saving & Opening  
Working In More Than One File  
Closing & Creating New Files

#### Page Setup

Portrait & Landscape  
Scaling  
Paper Size  
Margins  
Centre On Page

#### Print & Print Preview

Page Breaks  
Page Break Preview (2007/2010 only)  
Preview  
Print Options

### More Information

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Classroom Locations: Toronto, North York, Mississauga, Newmarket



# Excel Intermediate Level 1

1 Day (9am to 4pm)

## Course Description

Simple spreadsheets are alright, but in a real-world business environment things are not usually simple. This course will take you through several techniques for handling more realistic complex situations, such as spreadsheets that are too big to work with easily, spreadsheets that are spread across multiple pages, and how to interact with other files created by other people in spreadsheets of your own.

**Course Prerequisite:** Understanding of Excel Introduction topics.

## Topics Covered

### Multiple Sheets

Switching From Page To Page  
Modifying Sheets & Sheet Tabs  
Moving and Copying Sheets  
Setting Defaults for All Sheets  
Changing the Number of Pages

### Format Sheet

Sheet Background  
Background Picture (2007/2010 only)

### Window Panes & Freezing Titles

Splitting a Window into 2 or 4 Panes  
See Widely Separated Areas  
Simultaneously  
Freezing Titles  
Unsplitting and Unfreezing  
View Side by Side (2007/2010 only)

### Views and Cell Comments

Full Screen Display  
Setting Zoom Levels  
Attaching Comments to Cells  
Editing, Deleting & Printing Comments

### Multiple Files

Opening Multiple Files  
Displaying Multiple Files  
Linking Cells Between Files (not formulas)  
Updating Links  
Closing All Files  
Setting This Equals That Links

### Range Names

Creating a Range Name  
Using Range Names For Navigation  
Using Names Already Entered as Headings  
Range Names as Bookmarks  
Filtering Range Names (2007/2010 only)

### Using AutoCorrect

### Using Format Painter to Copy Formats

### Sorting & Filtering

Setting Up A Database  
The Current Region  
Sorting Lists Alphabetically/Numerically  
Multiple Level Sorting  
Sorting by Colour/Icon (2007/2010 only)  
Using AutoFilter to Extract Information  
Custom Criteria  
And vs. Or  
Reapplying a Filter (2007/2010 only)

### Format as a Table (2007/2010 only)

The Design Tab  
Cell Styles & Themes

### The List Feature (2003 only)

Data Forms

### Find & Replace

Finding Text, Values, Functions  
Replacing Text  
Replacing Functions

### Advanced Page Setup and Printing

Headers and Footers  
Printing Column And Row Titles  
Printing Gridlines  
Page Order  
*Review Of Page Breaks And Printing*

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# Excel Formulas

## 1 Day (9am to 4pm)

### Course Description

Excel's core strength is its ability to perform calculations, and calculations are done with formulas. This course focuses on mathematical formulas (and so is often taken in conjunction with Computer Help's Excel Functions course). Beginning from one simple technique that makes simple formulas, you'll build up through more and more complex situations learning the correct way to integrate your numbers no matter where they're located.

**Course Prerequisite:** Excel Introduction and Intermediate Level 1 or equivalent knowledge. It is not a necessary to take Intermediate Level 2 before this course. The topics in this course are unrelated to Intermediate Level 2 topics.

### Topics Covered

#### Review of Basic Formulas

Using Operators  
Order of Calculation  
Formulas that Reference One Cell  
Copying and Filling Formulas

#### A Brief Introduction to Functions

Using Sum & Average  
Using AutoSum

#### Absolute Formulas

Partial Absolute Formulas

#### Date and Time Formulas

Using Today and Now  
Calculating Days Between Dates  
Calculating Years Between Dates  
Calculating Time Differences

#### Manipulating Formulas

Editing Formulas  
Converting Formulas to Values  
Printing Formulas in Place of Results  
Manual Calculation

#### Combining/Splitting Cell Contents

Concatenating Formulas  
Text To Columns

#### Referencing Cells Not On Sheet

Multiple Sheet Formulas  
Multiple File Formulas  
Linking Formulas  
Save and Open Workspace

#### Formulas And Range Names

Using Range Names in Formulas  
Using Range Names For Values  
Column/Row Headings in Formulas

#### Mapping Formulas with Auditing

Tracing Formulas  
The Auditing Toolbar (2003 only)  
Tracing Dependents and Precedents  
Step Into a Formula  
Watch Window

#### Text Formulas

Adding Text to Value Cells

#### Goal Seek

Have Excel Change Cell Value To Arrive At Desired Result

#### Formulas That Cannot Be Edited

Creating Array Formulas  
Editing Array Formulas

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# Excel Intermediate Level 2

1 Day (9am to 4pm)

## Course Description

A simple spreadsheet is often enough, but many times you need to make it look good too. This course's emphasis is on the visual aspects of an Excel spreadsheet. Whether it's something as simple as getting cells to colour themselves based on the values entered, to mid-level tricks like making in-cell menus, to complex topics like making a graph, you'll learn it here.

**Course Prerequisite:** Excel Introduction or equivalent knowledge. It is not a necessary to take Intermediate Level 1 before this course. The topics in this course are unrelated to Intermediate Level 1. However you must have a solid understanding of the basics in Excel (Introduction topics) before attempting this course.

## Topics Covered

### AutoFormat & Styles (2003 only)

AutoFormat a Spreadsheet  
Using Styles to Speed Repetitive Formatting  
Creating and Editing Styles

### Format as Table (2007/2010 only)

Using The Design Tab  
Design Your Own Table Style  
Creating and Editing Cell Styles  
Using Cell Styles in Other Workbooks

### Customizing Toolbars (2003 only)

Choosing Different Toolbars  
Creating Custom Toolbars  
Changing Toolbar Display

### Passwords

Protecting Sheets  
Protecting Workbooks  
Unprotecting Specific Cells  
Password Protect Files

### Data Validation

Setting the Validation Rules  
Setting the Allowable Values  
Choosing from a Drop-Down List  
Input Message  
Error Alert

### Conditional Formatting (2003 only)

Conditional Formats Based on Values  
Conditional Formats based on Formulas

### Conditional Formatting (2007/2010 only)

Highlight Cell Rules  
Top/Bottom Rules  
Data bars, Color Scales, Icon Sets  
Manage Rules  
Stop if True  
Clearing Rules

### Charts (Graphs)

Creating and Editing  
Formatting Items in a Chart  
Changing Chart Types  
Naming Charts  
Printing Charts  
Unlinking Charts From Data

### Drawing Tools

Lines, Arrows, Freehand  
Boxes, Circles, Arcs  
Text Boxes  
Group, Ungroup, Order  
Colours and Shadows  
Moving, Sizing, Formatting Objects  
Add Pictures and Clip Art (2007/2010 only)  
SmartArt Graphics (2007/2010 only)  
Adding ScreenShots (2010 only)  
Lines, Arrows, Freehand  
Boxes, Circles, Arcs  
Text Boxes  
Group, Ungroup, Order  
Colours and Shadows

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# Excel Functions

## 1 Day (9am to 4pm)

### Course Description

Functions are Excel formulas that make your computer do the heavy lifting of calculating rather than making you explain every step of the work. If you've looked at other peoples' spreadsheets full of words like IF, VLOOKUP, ROUND, and SUMIF and wondered how they worked, then this is the course you are looking for.

As well as teaching you how to create the most commonly used functions (with a special focus on IF and VLOOKUP), this course will also show you how to understand any complicated function formula you might encounter in future. Not only will you know many useful tricks by the end of the course, you'll have laid the foundation for future self-learning up to a very high level of complexity.

### Topics Covered

#### Creating a Basic Function

Typing Functions  
Using Insert Function

#### Review of Using AutoSum

4 Ways to Add up Numbers  
Sum and Average

#### Statistical Functions

Count  
CountA  
Large  
Small  
Rank  
Max  
Min  
Average  
Median  
Mode

#### Functions Across Multiple Ranges

Multiple Ranges on Same Sheet  
Multiple Ranges on Different Sheets  
Multiple Ranges in Different Files (Linking)

#### Math and Trig Functions

Product  
Roman  
Sum  
SumIf  
Round  
RoundUp  
RoundDown  
Ceiling  
Floor

#### Date and Time Functions

Today  
Now  
Date  
Value  
Day  
Month  
Year  
Weekday

#### Text Functions

Left  
Mid  
Right  
Len  
Search  
Trim  
Lower  
Upper  
Proper

#### Logical Functions

If  
Nesting If's  
And  
Or

#### Information Functions

IsErr  
NA  
IsText  
IsNumber  
IsBlank

#### Lookup Functions

Vlookup  
Hlookup  
Choose  
Transpose

#### Financial Functions

IRR  
FV  
PMT  
PV  
DB

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# Excel Advanced Level 1

1 Day (9am to 4pm)

## Course Description

Did you know that as well as being a calculating tool, Excel is also very good at analyzing lists of information? If you have to work with one or more employee lists, product lists, inventories, or transaction ledgers, this is the course for you. You will learn how to set up a your spreadsheet so that it is flexible as possible, particularly if your list gets new items added periodically, or you get an entirely new set of items on a regular basis. Once you know how to set it up, you'll learn how to work with your list in a way that maximizes the number of reports you can make while minimizing the time it takes. By the end of the course you will be able to make reports that contain only the information your readers want, break down lists into the categories you want, turn your results into attractive reports, and answer new questions on the fly.

**Course Prerequisite:** An Intermediate level knowledge of Excel is required before taking this course.

This includes the Excel Introduction course, or equivalent knowledge, plus Intermediate Level 1 *or* Level 2 *or* Formulas and/or Functions. It is *not* a necessary to take both Intermediate courses and the Formulas and Functions courses before this course. However, you must have a solid understanding of Excel before attempting this course.

## Topics Covered

### Morning

#### Pivot Tables

Creating a Pivot Table with the Wizard (2003)  
Creating a Pivot Table from scratch  
Using the Field List  
Using the Pivot Table Toolbar (2003)  
Choosing what Data to Display and Hide  
Creating Totals and Subtotals  
Creating Averages, Counts, etc.  
Pivot Table Formulas  
Refreshing Data

#### Changing the Layout of a Pivot Table

Rearranging Fields  
Move a Pivot Table  
Creating Groups  
Formatting a Pivot Table  
Using AutoFormat  
Selecting Elements within a Pivot Table  
Field Options  
Pivot Table Options

#### Basic Pivot Table Formatting

Selecting Shortcuts  
Pivot Table Styles  
Creating Groups

Creating Groups Based on Dates  
Collapse & Expand Fields

#### Calculations

Creating Totals and Subtotals  
Creating Averages, Counts, etc.  
Creating Calculated Fields  
Creating Calculated Items

#### Pivot Table Summaries

Creating Drill-Downs  
Show Report Filter Pages  
Filtering Pivot Table Fields

#### Pivot Table Slicers (2010 only)

Using Slicers  
Slicer Connections  
Slicer Styles & Other Slicer Settings

#### Creating Pivot Tables from External Data

Creating Pivot Tables from Multiple Consolidation Ranges  
Creating Pivot Tables from Other Pivot Tables

#### Creating Pivot Charts

Working with Pivot Charts  
Formatting Pivot Charts

### Afternoon

#### Advanced Filter

Setting Up the Ranges  
Setting Up the Criteria Range  
Performing the Filter  
Copy Unique Records to Another Location

#### Creating Database Functions

Using DSUM, DAVERAGE, DCOUNT, etc.  
Creating Criteria Ranges  
Editing Criteria to Change Formula Results  
Using Range Names in Database Functions

#### Group & Outline, & Subtotals

Grouping Rows/Columns on a Sheet  
Showing/Hiding Details in an Outline  
Display/Hide Outline Symbols

#### Using Subtotals

Adding Automatic Subtotals  
Adding Other Automatic Analysis (Average, Count, etc)  
Removing Subtotals

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# Excel Advanced Level 2

1 Day (9am to 4pm)

## Course Description

This course concentrates on using Excel in a group situation. As an advanced user, you're often the focus of several people, and need to develop spreadsheets that will be used by them as well as yourself. By the end of this course you'll be able to make pre-made forms and templates, build spreadsheets that can be accessed by several users simultaneously, and connect Excel to other sources of data such as Access databases and web pages.

**Course Prerequisite:** An Intermediate level knowledge of Excel is required before taking this course. This includes the Excel Introduction course, or equivalent knowledge, plus Intermediate Level 1 or Level 2 or Formulas and/or Functions. It is *not* necessary to take Advanced Level 1 before taking this course; however, you must have a solid understanding of Excel before attempting it.

## Topics Covered

### Templates

Using an Existing File as a Template  
Creating a Template  
Using In a New File  
Templates and Inserting Sheets  
Auto templates for default Books or Sheets

### Forms

Form Templates  
Designing the Form  
Tools-Combo Boxes, List Boxes, etc.  
Control Properties  
Protecting the Form

### Sharing Workbooks and Tracking Changes

Sharing workbooks on a network  
Multiple users in the same file  
Controlling which changes are saved

### Data Consolidation

Consolidate Multiple Worksheets into One  
Consolidate by Position  
Consolidate by Category  
Consolidate from Other Workbooks

### Importing and Exporting (2003 only)

Importing Text Files  
Importing Access Tables  
Exporting Data

### Importing Data (2007/2010 only)

From Another Spreadsheet  
Paste Link  
Insert Object

### Get External Data (2007/2010 only)

Importing from Access  
Importing Text Files  
Importing from Web  
Working with Connections  
Open External Files

### Customizing Excel

Changing Default Options  
Custom Lists

### Numeric Formats

Custom Numeric Formats  
Formatting Codes  
Custom Date & Time Formats  
Special Characters  
Codes That React To Different Number Types

### Scenarios

Creating and Saving the Scenario  
Displaying Scenarios  
Other Scenario Options-Edit, Merge, Summary, etc.

### Data Tables (2007/2010 only)

Creating  
Substitute Consecutive Values in a Formula

### Solver

Setting Objective/Target  
Specifying Variable Cells  
Specifying Constraints

### A Brief Introduction to Macros

What is a Macro?  
Recording a Macro  
Playing a Macro  
Relative Referencing  
Rerecording a Macro

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# Excel Macros & VBA Level 1

3 Days (9am to 4pm)

## Course Description

While Excel is a very powerful and complete tool, you'll sometimes encounter a situation where the program is missing some feature you really need. Whether it's the ability to massage a list of data a particular way or make a sophisticated spreadsheet that is nevertheless safe to hand off to beginner users, a macro is the way to go.

In this course you will learn the basic concepts of macros, from simple recorded macros to sophisticated written VBA macros. It is intended for students who either have repetitive work to do in Excel and would like to teach the program how to do it, or who are in an informal support role and create spreadsheets for less-sophisticated Excel users. It also lays the foundation for students who need more formal and complete understanding of large-scale Excel customization and are moving on to the Level 2 and 3 courses.

**Course Prerequisite:** Required: Solid understanding of all Excel Introduction, and Intermediate Levels I & II topics.  
Recommended: Knowledge of Excel Advanced topics.

## Topics Covered

### Basic Macro Concepts

Macros And Sub Procedures  
Limitations Of Recorded Macros

### Recording Macros

Relative Referencing  
Macro Options  
Storing Macros  
Editing A Macro  
Debugging A Macro  
Step Into, Step Over, Step Out  
Run To Cursor  
Seven Ways To Run A Macro; Adding To Toolbars, Creating Buttons, Etc.

### Visual Basic

Defining Projects, Modules, Sub Procedures, Statements, And Events  
The Visual Basic Editor  
Views And Icons  
Adding Comments  
Checking Syntax Errors  
Sub Procedures  
Structures Of Sub Procedures

### Objects

Working With  
Object Names  
Class

### Properties

Common Properties  
Using The With Command  
Properties That Are Objects

### Methods

Common Methods  
Events

### The Object Browser

Project/Library Box  
Classes

### Variables

Constants  
Variable Types  
String Variables  
Date Variables  
Declaring Several Variables

### User Interaction

Input Boxes  
Converting Input Box Answers  
Message Boxes  
Building Messages  
Special Characters To Sue When Concatenating  
Message Box For Input  
Status Bar Messages

### Flow Of Control

If ... Then Statements  
If ... Then ... Elseif  
Running Other Procedures From Within Procedures  
If Statements With Message Boxes  
For ... Next Loops  
Do While ... Loops

### Event Trapping

Auto\_Open And Auto\_Close  
On Error Go To  
Resume  
Application Event Properties  
Other Objects' Event Properties

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# Excel Macros & VBA Level 2

3 Days (9am to 4pm)

## Course Description

This course builds on Computer Help's Macros & VBA Level 1. In it you will focus on two main Excel tasks that are best handled by macros. First you'll look at the creation of custom dialog boxes and functions so that you can code sophisticated spreadsheets that are nevertheless still usable by basic Excel users. Second we'll learn how to interact with and manipulate data in the two most common places where data can be found: spreadsheet ranges whose size you don't necessarily know in advance, and completely separate files from the one in which the macro is running.

**Course Prerequisite:** Solid understanding of all Excel Macros & VBA Level I topics.

## Topics Covered

### Custom Functions

Why Create Functions  
Create And Edit Functions  
Declaring Functions  
Arguments In Functions  
Adding To Paste Function Dialog Box

### Public Vs Private Declarations

Extending the Scope of a Variable

### Arrays

Introduction To Array Concept  
Array Functions In Excel  
Ranges And Arrays  
Sorting An Array  
Using Arrays In VBA to Sort Sheets Alphabetically

### Working With Ranges

Move And Copy Fixed Or Variable Ranges  
Determining Next Empty Cell  
Determining Types Of Ranges  
Copying Ranges from Sheet to Sheet, File to File  
Returning Information About A Range  
Analyzing Cells In A Range  
Removing Empty Rows  
Removing Rows based on Content

Determining If A Range Is Contained In Another Range  
Procedure To Sort Worksheets

### Working With Files

Processing A Series Of Files  
Extracting File Information—Name,Path, etc.  
Using VBA to Process Text Files  
Using VBA to Delete Files

### Select Case

Using Case Instead of IF  
Select Case Constructs  
Nesting Case Statements

### Creating and Designing Forms and Custom Dialog Boxes

VBA Forms vs. Excel Forms  
Create a Custom Dialog Box form  
Combo Boxes  
List Boxes  
Check Boxes  
Option Buttons  
Labels  
Using Event Handling to Display Forms  
User Form Templates  
Multi – Page Forms

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# Excel Macros & VBA Level 3

3 Days (9am to 4pm)

## Course Description

This course is aimed at users who want to customize Excel so completely that it's essentially a custom program running on top of a spreadsheet. If you like Excel's calculation capabilities, but find that it's too generic to handle the kinds of projects you want to do, this is the course for you. This course also looks at tying Excel to other Windows programs so as to use any capabilities that are lacking in Excel itself.

**Course Prerequisite:** Solid understanding of all Excel Macros & VBA Levels I & II topics.

## Topics Covered

### Advanced UserForm List Boxes

Displaying Unique Items  
Using a Variable Range Source  
List Boxes with Changing Contents  
Multiple Column List Boxes  
List Boxes to Select Rows/Columns/Sheets

### Creating Wizards

Using Multiple UserForms  
Using 1 UserForm and MultiPage Control

### Advanced UserForms

Modeless Dialog Boxes  
Using Labels to Display Formula Results

### Examining a Text Utility

Seeing how Dialog Box can be made that will:

- Change text case
- Add text
- Remove Text
- Remove Spaces

### Using Excel Events

Sequence of Events  
Workbook Events (Activate/Deactivate, BeforeClose, BeforePrint, BeforeSave, NewSheet, Open, SheetActivate)  
Worksheet Events (BeforeRightClick, Change, SelectionChange)  
UserForm Events  
Application Events  
Timed Events  
Disabling events

### Working with Charts

Activating & Deleting  
Chart Formatting  
Converting Embedded Chart to Chart Sheet and Vice-Versa  
Looping Through All Charts  
Changing Chart Type Based on Selected Cell  
Displaying in UserForms

### Working with Pivot Tables

Creating a Pivot Table with VBA  
Modifying a Pivot Table  
Creating Multiple Pivot Tables

### Customizing Toolbars & Menus with VBA (Excel 2003)

Showing/Hiding  
Create and Customize Command Bars with VBA  
Making Toolbars Context-Sensitive  
Customizing Menus with VBA  
Adding/Deleting Menu Items  
Working with Shortcut Menus

### Working with Other Applications

Running Simple Applications – Character Map, Calculator  
Interacting with Microsoft Word

### Developing an Add-In

Testing Your Application  
Protecting Your Add-In  
Snooping Around a Protected Add-In

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# Excel Upgrade to 2007/2010

1 Day (9am to 4pm)

## Course Description

The release of Office 2007 brought a major change in the way Excel spreadsheets are made. With the new Ribbon interface both Office 2007 and 2010 approach many tasks, even the simplest ones, in a new way. If you're comfortable with older versions of Excel, you may find yourself floundering for some time before you can become proficient in these new versions. Why not save yourself time and trouble by taking this course and getting Computer Help to show you how to transition to the new Office, rather than having to figure it out on your own?

**Course Prerequisite:** This course is *not* intended for beginners. An Intermediate or better knowledge of Excel (versions 97, 2000, 2002 XP, or 2003) is essential.

## Topics Covered

### General

New Interface  
The Office Button (2007) and File Tab (2010)  
The Ribbon  
Customize Quick Access Toolbar  
Customize the Ribbon (2010)

### Creating & Editing Workbooks

Larger Spreadsheets  
Column & Row Headings  
Using Templates  
Using Themes and Styles  
Page Layout Options  
Headers and Footers  
Improved Spell & Grammar Checker  
Mark as Final for Read-Only  
Viewing Workbooks

### Formulas & Formatting

Basic Formatting  
Enhanced Conditional Formatting  
New Formatting as Table  
Total Row  
Improved Formula & Function tools  
Working with Range Names

### Sorting & Filtering

Improved Find & Replace  
Improved Sorting Options  
Improved Filters

### Charts & Graphics

Improved Look for Charts  
New Chart Formatting Tools  
Adding Graphics and Shapes  
Enhanced Formatting of Graphics and Shapes  
Professional Diagrams with SmartArt  
Sparklines (2010)

### Pivot Tables

More Levels of Undo  
Sorting & Filtering in Pivot Table  
Conditional Formatting  
Pivot Table Styles and Formats  
Pivot Table Slicers (2010)

### Productivity Tools

Sharing Workbooks  
Connections to Outside Sources, e.g. Currency Exchanges  
Enhanced Printing Options, including Page Layout View

### Saving and Converting

Converting Existing Workbooks to 2007/2010  
Converting 2007/2010 Workbooks to earlier versions  
Converting to Other Formats

## More Information

For a complete course schedule, including prices, course dates and locations, please visit our web site at: [www.Computer-Help.ca/Schedule.htm](http://www.Computer-Help.ca/Schedule.htm). To register for a course, call 416-494-4912 or register online at: [www.Computer-Help.ca/Registration.htm](http://www.Computer-Help.ca/Registration.htm)

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Classroom Locations: Toronto, North York, Mississauga, Newmarket

