

Introduction, 1 Day

Course Description

This course introduces participants to the Microsoft Excel program. The objective is to make the student comfortable with spreadsheet concepts like columns, rows, cells, sheets, and creating formulas. At the end of the course, students can begin creating their own spreadsheets and be comfortable enough to pursue the more sophisticated topics covered in the Intermediate and Advanced courses.

Prerequisites

Participants should already be familiar with basic Windows use. No prior experience with Excel is necessary

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
- 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 Fill To Automate Entering Months, Days, Numbers, And To Copy Formulas

Inserting & Deleting

- Columns
- Rows
- Partial Columns And Rows

Cell Formatting

- Attributes
- Changing Font
- Applying Borders
- Using Colour For Shading And Reverse Video

Files

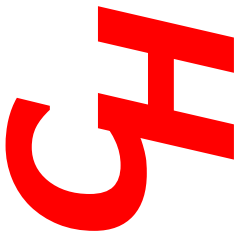
- Saving & Opening
- Working In More Than One File
- Closing & Creating New Files

Page Setup

- Portrait & Landscape
- Scaling
- Paper Size
- Margins
- Centre On Page

Print & Print Preview

- Page Breaks
- Page Break Preview (2007 only)
- Preview
- Print Options



Intermediate Level 1, 1 Day

Course Description

After learning the basics in the Introduction course, this course is an absolute must to get the most out of Excel. You will learn important features that will save you time and make you much more efficient with the program.

Prerequisites

Excel Introduction or equivalent knowledge.

Topics Covered

Multiple Sheets

- Switching From Page To Page
- Modifying Sheets
- Moving and Copying Sheets
- Setting Defaults for All Sheets
- Changing the Number of Pages
- Background Picture (2007 only)

Window Panes And Freezing Titles

- Splitting a Window into 2 Or 4 Panes
- See Widely Separated Areas of a Spreadsheet Simultaneously
- Freezing Titles
- Unsplitting and Unfreezing
- View Side by Side (2007 only)

Views and Cell Comments

- Full Screen Display
- Setting Zoom Levels
- Attaching Comments to Cells
- Editing and Deleting Comments

Multiple Files

- Opening Multiple Files
- Displaying Multiple Files
- Linking Cells Between Files (not formulas)
- Closing All Files

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 only)

Using AutoCorrect

Database Tools

- Setting Up A Database
- The Current Region
- Sorting Lists Alphabetically/Numerically
- Sorting by Colour/Icon (2007 only)
- Using AutoFilter to Extract Information

The List Feature (Excel 2003)

- Data Forms

Format as Table (2007 only)

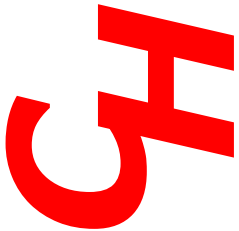
- The Design Tab
- Cell Styles & Themes

Find & Replace

- Finding Text, Values, Functions
- Replacing Text
- Replacing Functions

Advanced Page Setup and Printing

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



Excel Formulas, 1 Day

Course Description

This course is designed for Excel users who would like to learn more about creating formulas, as well as brushing up on math skills.

Prerequisites

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

Absolute Formulas

- Partial Absolute Formulas

Formulas And Range Names

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

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

Text Formulas

- Adding Text to Value Cells

Date and Time Formulas

- Calculating Days Between Dates
- Calculating Years Between Dates
- Calculating Time Differences

Referencing Cells Not On Sheet

- Multiple Sheet Formulas
- Multiple File Formulas
- Linking Formulas

Auditing

- Tracing Formulas
- The Auditing Toolbar
- Tracing Dependents and Precedents
- Displaying Formulas

Goal Seek

- Have Excel Change Cell Value To Arrive At Desired Result

Formulas That Cannot Be Edited

- Creating Array Formulas
- Editing Array Formulas

Intermediate Level 2, 1 Day

Course Description

This course examines features of Microsoft Excel which assist in working with larger spreadsheets, as well as creating graphs and using drawing tools.

Prerequisites

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 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 List
Input Message
Error Alert

Conditional Formatting (2003 only)

Conditional Formats Based on Values
Conditional Formats based on Formulas

Conditional Formatting (2007 only)

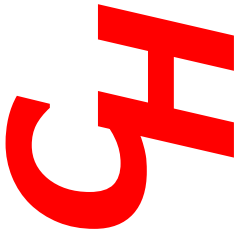
Highlight Cell Rules
Top/Bottom Rules
Data bars, Color Scales, Icon Sets
Manage Rules
Stop if True
Clearing Rules

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 only)
SmartArt Graphics (2007 only)
Lines, Arrows, Freehand
Boxes, Circles, Arcs
Text Boxes
Group, Ungroup, Order
Colours and Shadows



Excel Functions, 1 Day

Course Description

This course is designed for Excel users who would like to learn more using the various functions available in Excel.

Prerequisites

Excel Introduction and Formulas courses or equivalent knowledge. Excel Intermediate Level 1 and Intermediate Level 2 courses are not required before taking this course, although knowledge of the topics covered in them is strongly recommended.

Topics Covered

Review of Using AutoSum

Typing Functions
Using Insert Function

Statistical Functions

Count / CountA
Large / Small
Rank
Max / Min
Average
Median
Mode

Logical Functions

If
And
Or

Math and Trig Functions

Product
Roman
Sum
SumIf
Round
RoundUp
RoundDown

Date and Time Functions

Today, Now
Date
Value, Day
Month
Year
Weekday

Text Functions

Left / Mid / Right
Len
Search
Trim
Lower / Upper / Proper

Information Functions

IsErr
NA
IsText / IsNumber / IsBlank
Info

Lookup Functions

Vlookup
Choose
Transpose

Financial Functions

IRR
FV
PMT
PV
DB

Advanced Level 1, 1 Day

Course Description

This course looks at some of the advanced features in Excel that assist in the summarizing of large spreadsheets. Topics covered will help to make sense out of the data and allow for the creation of sophisticated summary reports. (Half of this course is spent learning how to create Pivot Tables.)

Prerequisites

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

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
- 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
- Creating Groups
- Formatting a Pivot Table
- Using AutoFormat
- Selecting Elements within a Pivot Table
- Field Options
- Pivot Table Options

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

Group & Outline, & Subtotals

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

Using Subtotals

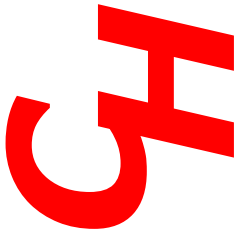
- Adding Automatic Subtotals
- Adding Other Automatic Analysis (Average, Count, etc)
- Removing Subtotals

Creating Database Functions

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

Advanced Filter

- Setting Up the Ranges
- Performing the Filter
- Setting Up the Criteria Range



Advanced Level 2, 1 Day

Course Description

This course looks at some more of the advanced features in Excel. Topics covered will speed up repetitive actions, and further customize Excel.

Prerequisites

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

- 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

Importing and Exporting (2003 only)

- Importing Text Files
- Importing Access Tables
- Exporting Data

Importing Data (2007 only)

- From Another Spreadsheet
- Paste Link
- Insert Object

Get External Data (2007 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
- Dates & Times
- 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 (version 2007 only)

- Creating
- Substitute Consecutive Values in a Formula

A Brief introduction to Macros

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

Macros & VBA Level 1, 3 Days

Course Description

This course explores creating, editing, and using Excel Macros and provides a good introduction to the relationship between macros and Visual Basic.

Prerequisites

Advanced Level Excel knowledge is needed before taking this course.

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

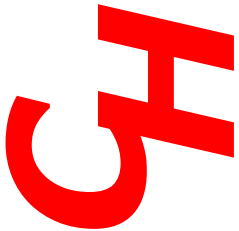
If ... Then Statements
If ... Then ... Elseif
Running Other Procedures From
Within Procedures
If Statements With Message Boxes
For ... Next Loops
Do While ... Loops

Event Trapping

Auto_Open And Auto_Close
On Error Go To
Resume
Application Event Properties
Other Objects' Event Properties

Working With Other Programs

Opening / Sending Commands To
Linking Up With Libraries



Macros & VBA Level 2, 3 Days

Course Description

This course builds on the topics covered in the first Macros course, and covers further techniques and examples for programming Excel with VBA

Prerequisites

Excel Macros & VBA Level 1 or equivalent knowledge is essential before taking this course.

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

- Function Declarations
- Procedure Declarations

Arrays

- Introduction To Array Concept
- Array Functions In Excel
- Using Arrays In VBA

Working With Ranges

- Move And Copy Fixed Or Indefinite Ranges
- Determining Next Empty Cell
- Determining Types Of Ranges
- Returning Information About A Range
- Analyzing Cells In A Range
- Determining If A Range Is Contained In Another Range
- Ranges And Arrays
- Sorting An Array
- Procedure To Sort Worksheets

Working With Files

- Processing A Series Of Files
- Extracting File Information–Name,Path, etc.
- Using Relative Sheet References In Custom Functions

Select Case

- Using Case Instead of IF
- Select Case Constructs

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

Macros & VBA Level 3, 3 Days

Course Description

This course builds on the topics covered in the second Macros course, and covers further techniques and examples for programming Excel with VBA

Prerequisites

Excel Macros & VBA Level 2 or equivalent knowledge is essential before taking this course.

Topics Covered

Advanced UserForms & Dialog Boxes

- Advanced List Boxes
- Creating New List Box from Selected Items in Another
- Move Items
- List Boxes to Select Rows/Columns/Sheets

Developing Text Utilities

- Creating a Dialog Box that will:
 - Change text case
 - Add text
 - Remove Text
 - Remove Spaces

Working with Charts

- Activating & Deleting
- Chart Formatting
- 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

Using Excel Events

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

Working with Other Applications

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

Customizing Toolbars & Menus with VBA (Excel 97 to 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

Creating Wizards

- Using the MultiPage Control to design Wizards