

| <b>MICROSOFT EXCEL INTRODUCTION (LEVEL 1)</b>   |  |
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| A one-day course to introduce you to Excel and show you the basic functions of the program. |  |
| <b>Prerequisite</b> – Introduction to Windows   |  |
|   |  |
| <b>LESSON 1:</b>  |  |
| Understand The Principles Of Spreadsheets   |  |
| Microsoft Excel Introduction  |  |
| Access Excel  |  |
| Exit Excel  |  |
| The Excel Window  |  |
| The Worksheet Window  |  |
| The Mouse   |  |
| Help  |  |
| Using Excel Help  |  |
| Formative Assessment 1:   |  |
| <b>LESSON 2:</b>  |  |
| Working In Microsoft Excel  |  |
| Learning Outcome 2 And 3  |  |
| Workbooks   |  |
| Create A Workbook   |  |
| Open An Existing Workbook   |  |
| Close A Workbook  |  |
| Save A Workbook   |  |
| Delete A Workbook   |  |
| Move Around A Worksheet   |  |
| Cells And Ranges  |  |
| Enter Data  |  |
| Edit Data   |  |
| Formative Assessment 2  |  |
| Formative Assessment 3:   |  |
| <b>LESSON 3:</b>  |  |
| Working In A Microsoft Excel Spreadsheet  |  |
| Spell Check Text  |  |
| Autocorrect   |  |
| Copy Data   |  |
| Move Data   |  |
| <b>LESSON 4:</b>  |  |
| Format A Worksheet  |  |
| Set Column Widths   |  |
| Insert Columns And Rows   |  |
| Delete Rows And Columns   |  |
| Formative Assessment 4  |  |

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| <b>LESSON 5:</b>                             |  |
| Enter Formula In A Spreadsheet               |  |
| Formula                                      |  |
| Simple Addition Of Cells                     |  |
| Subtraction Of Cells                         |  |
| Multiplication Of Cells                      |  |
| Division Of Cells                            |  |
| Calculate Percents                           |  |
| Edit Formula                                 |  |
| Copy Formula                                 |  |
| Functions                                    |  |
| Sum  |  |
| Average                                      |  |
| Minimum                                      |  |
| Maximum                                      |  |
| Formative Assessment 5:                      |  |
| <b>LESSON 6:</b>                             |  |
| Format Data In A Microsoft Excel Spreadsheet |  |
| Format Data                                  |  |
| Bold   |  |
| Italic                                       |  |
| Underline                                    |  |
| Font And Font Size                           |  |
| Text Colour                                  |  |
| Align Data                                   |  |
| Number Format                                |  |
| Lines And Borders                            |  |
| Shading                                      |  |
| Clear A Format                               |  |
| Formative Assessment 6:                      |  |
| <b>LESSON 7:</b>                             |  |
| Page Setup And Print A Spreadsheet           |  |
| Print Multiple Copies                        |  |
| Views  |  |
| Normal And Page Layout View                  |  |
| Zoom   |  |
| Page Layout                                  |  |
| Paper Size                                   |  |
| Margins                                      |  |
| Page Orientation                             |  |
| Printing                                     |  |
| Print Preview                                |  |
| Print  |  |
| Formative Assessment 6:                      |  |
| <b>FINAL EXERCISES</b>                       |  |
| <b>APPENDIX</b>                              |  |

## MICROSOFT EXCEL INTERMEDIATE (LEVEL 2)

Microsoft Excel Intermediate is a one-day course. Prerequisite: Microsoft Excel Introduction.

### LESSON 1:

Insert Formula And Functions Into A Spreadsheet

Formula

Calculating Percentages

Editing Formula

Copying Formula

Absolute Value

Functions

Sum

Autosum Tool

Average

Minimum

Maximum

Count

Date Functions

Common Errors

Formative Assessment 1

### LESSON 2:

Working With Multiple Worksheets In A Microsoft Excel Workbook

Working With Multiple Worksheets

Inserting A Worksheet In A Workbook

Deleting A Worksheet In A Workbook

Copy Worksheets

Move Worksheets

Renaming A Worksheet

Moving Between Worksheets

Group Sheets

Ungroup Sheets

Working With Groups

Colour Tabs

### LINKING

Linking Cells Across Sheets

Linking Using =

Linking Using Copy, Paste Special, Link

Calculating Across Worksheets

Formula Across Worksheets

Calculating Ranges Across Worksheets

Notes About Linking

Formative Assessment 2

|  |  |
|--|--|
| <b>LESSON 3:</b>                           |  |
| Create And Edit A Chart                    |  |
| Charts In Excel                            |  |
| Creating Charts                            |  |
| Move A Chart                               |  |
| Resize A Chart                             |  |
| Chart Sheets And Embedded Charts           |  |
| Chart Type                                 |  |
| Types Of Charts                            |  |
| Editing A Chart                            |  |
| Change The Source Data                     |  |
| Chart Layout                               |  |
| Change The Order Of The Series             |  |
| Add Chart Titles                           |  |
| Add Axis Titles                            |  |
| Gridlines                                  |  |
| Legends                                    |  |
| Data Labels                                |  |
| Data Table                                 |  |
| Chart Styles                               |  |
| Change The Colour/Pattern Of A Series      |  |
| Formatting Parts Of A Chart                |  |
| Changing An Axis Scale                     |  |
| Change The Value Axis (Usually The Y Axis) |  |
| Formatting Titles                          |  |
| Formatting Chart Background                |  |
| Adding Text                                |  |
| Adding Objects                             |  |
| Print A Chart                              |  |
| Copy, Paste And Link                       |  |
| Formative Assessment 3                     |  |
| <b>LESSON 4:</b>                           |  |
| Insert And Edit Objects                    |  |
| Graphics                                   |  |
| Inserting Clip Art                         |  |
| Insert A Picture From File                 |  |
| Adding Text                                |  |
| Adding Objects                             |  |
| Working With Graphics                      |  |
| Formative Assessment 4                     |  |
| <b>LESSON 5:</b>                           |  |
| Additional Copy Options And Custom Lists   |  |
| Additional Copy Features                   |  |
| Copying And Pasting Multiple Selections    |  |
| Fill Series                                |  |
| Custom Lists                               |  |

|                                  |  |
|----------------------------------|--|
| <b>LESSON 6:</b>                 |  |
| Working With Lists /Records      |  |
| Working With List (Records)      |  |
| Creating A List Of Records       |  |
| Sort Records                     |  |
| Filtering Information            |  |
| Manipulating Data                |  |
| Transpose                        |  |
| Text To Columns                  |  |
| Text To Value                    |  |
| Value To Text                    |  |
| Remove Duplicate                 |  |
| Concatenate                      |  |
| Left                             |  |
| Right                            |  |
| Mid                              |  |
| Subtotals And Grandtotal         |  |
| Views                            |  |
| Zoom                             |  |
| Freeze Titles                    |  |
| Clear Titles                     |  |
| Splitting Windows                |  |
| Printing                         |  |
| Page Setup                       |  |
| Set Print Areas And Print Titles |  |
| Headers And Footers              |  |
| Formative Assessment 6:          |  |

## MICROSOFT EXCEL ADVANCED (LEVEL 3)

Microsoft Advanced Excel is a one day course. Prerequisite: Microsoft Excel Intermediate

### LESSON 1:

Calculating Across Workbooks In Excel

Calculating Across Workbooks

Calculating Across Two Workbooks

Linking Cells

Linking Using =

Linking Using Copy, Paste Special, Link

Moving Worksheets To Other Workbooks

Copying Worksheets To Other Workbooks

Moving/Copying Worksheets To A New Workbook

Opening A Workbook Containing Links

Notes About Linking

Consolidating Information

Formative Assessment

### LESSON 2:

Named Ranges And Functions

Named Ranges

Naming Ranges Using The Menu

Creating Name Ranges Using Column Or Row Headings

Naming Ranges Using The Formula Bar

Applying Named Ranges

### FUNCTIONS

Select A Function

If Function

Nested If Function

Combining If Function With Other Functions

The If Function Can Be Combined With Many Other Functions.

And / Or

Ifsum

Rounding Numbers

=Round(Sum())

Is Functions

Isnumber

Istext

Iserror

Lookup Functions

Vlookup

Common Errors

Formative Assessment

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|---|--|
| <b>LESSON 3:</b>                          |  |
| Advanced Formatting, Styles And Templates |  |
| Additional Formatting                     |  |
| Setting Default Fonts                     |  |
| Shrink To Fit                             |  |
| Wrapping Text                             |  |
| Merging Cells                             |  |
| Copy Formats                              |  |
| Templates                                 |  |
| Creating A Template                       |  |
| Using A Template                          |  |
| Editing A Template                        |  |
| Delete A Template                         |  |
| Protecting Your Worksheet                 |  |
| Styles                                    |  |
| Applying An Existing Style                |  |
| Creating A Style                          |  |
| Creating A Style From An Existing Format  |  |
| Applying A Style                          |  |
| Copying Styles                            |  |
| Editing Styles                            |  |
| Deleting A Style                          |  |
| Conditional Formatting                    |  |
| Apply Conditional Formatting              |  |
| Clear Conditional Formatting              |  |
| Edit A Conditional Formatting Rule        |  |
| Formative Assessment                      |  |
| <b>LESSON 4:</b>                          |  |
| Advanced Filter And Pivot Tables          |  |
| Advanced Filter                           |  |
| Clear The Filter                          |  |
| Pivot Tables                              |  |
| Editing The Pivot Table                   |  |
| Rearranging Fields                        |  |
| Field Settings                            |  |
| Show Or Hide Subtotals And Grand Totals   |  |
| Insert A Calculation                      |  |
| Updating Pivot Tables                     |  |
| Display Or Hide Detail                    |  |
| Group And Ungroup                         |  |
| Formatting Pivot Tables                   |  |
| Report Layout Options                     |  |
| Number Format                             |  |
| Pivot Table Options                       |  |
| Pivotchart Reports                        |  |
| Formative Assessment                      |  |

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|---|--|
| <b>LESSON 5:</b>                            |  |
| Advanced Charts                             |  |
| Advanced Charts                             |  |
| Creating A Chart From Non-Contiguous Ranges |  |
| Chart Type                                  |  |
| Types Of Charts                             |  |
| Charts Templates                            |  |
| Applying A Template                         |  |
| Combination Charts                          |  |
| Changing The Data Range                     |  |
| Changing Individual Series                  |  |
| Copy, Paste Special, Paste Link             |  |
| Formative Assessment                        |  |
| <b>LESSON 6:</b>                            |  |
| Toolbars And Hyperlinks                     |  |
| Customising The Quick Access Toolbar        |  |
| Hyperlinks                                  |  |
| Html Files                                  |  |
| Formative Assessment                        |  |



## EXCEL SUPER USER (LEVEL 4) DAY 1

A one day course.

**Prerequisite:** Delegates should have completed the Excel Advanced Course.

### PIVOT TABLES

CREATE A PIVOT TABLE

PREDESIGNED PIVOT TABLES

EDITING THE PIVOT TABLE

ANALYZE

DESIGN

CHANGE DATA SOURCE

REARRANGING FIELDS

PIVOT TABLE FIELD LIST

DEFER UPDATE

REFRESHING PIVOT TABLES

EDITING THE PIVOT TABLE

REPORT LAYOUT OPTIONS

REPEAT ALL ITEMS

INSERTING BLANK ROWS AFTER ITEMS

SHOW OR HIDE SUBTOTALS

SORTING AND FILTERING

SORTING

FILTER

FILTERING PIVOT TABLES USING WITH SLICERS

FIELD SETTINGS

NUMBER FORMAT

INSERT A CALCULATION

GROUP AND UNGROUP

GROUP DATA

UNGROUP DATA

SHOW ITEMS WITH A COUNT OF ZERO

DISPLAY OR HIDE DETAIL / DRILL DOWN AND DRILL UP

SHOW ITEMS WITH A COUNT OF ZERO

DISPLAY OR HIDE DETAIL / DRILL DOWN AND DRILL UP

HIDE AND DISPLAY THE + / -.

CALCULATED FIELDS AND A CALCULATED ITEM

INSERT A CALCULATED FIELD

EXAMPLE: INSERT A CALCULATED FIELD

INSERTING A CALCULATED ITEM

EXAMPLE: INSERTING A CALCULATED ITEM

REFERENCING CELLS WITHIN A PIVOT TABLE

FORMATTING PIVOT TABLES

APPLY A STYLE

REMOVE A STYLE

CONDITIONAL FORMATTING

APPLY CONDITIONAL FORMATTING TO PIVOT TABLE

CLEAR CONDITIONAL FORMATTING

EDIT A CONDITIONAL FORMATTING RULE

PIVOT TABLE OPTIONS

|  |  |
|--|--|
| CREATE A PIVOT TABLE FOR EACH GROUP        |  |
| PIVOTCHART REPORTS                         |  |
|  |  |
| <b>EXCEL TABLES</b>                        |  |
|  |  |
| <b>NAMED RANGES</b>                        |  |
| TO INSERT A NAMED RANGE IN A FORMULA       |  |
| 3D NAMED RANGES                            |  |
|  |  |
| <b>FUNCTIONS</b>                           |  |
| SUMIF                                      |  |
| NESTED IF FUNCTION                         |  |
| COMBINING IF FUNCTION WITH OTHER FUNCTIONS |  |
| AND / OR                                   |  |
| IS FUNCTIONS                               |  |
| ISNUMBER                                   |  |
| ISTEXT                                     |  |
| ISERROR                                    |  |
| LOOKUP FORMULA                             |  |
| HLOOKUP                                    |  |
| HLOOKUP                                    |  |
| NESTED VLOOKUP                             |  |
| Nested IFNA and Vlookup                    |  |
| LOOKUP FUNCTION                            |  |
|  |  |
| <b>APPENDIX</b>                            |  |
| ADDITIONAL FUNCTIONS                       |  |
| FILL IN BLANK CELLS                        |  |
| CONVERT TEXT DATES TO DATES                |  |
| ARRAYS                                     |  |
| FORECAST                                   |  |
| FINANCIAL FUNCTIONS                        |  |

## EXCEL SUPER USER (LEVEL 4) DAY 2

A one day course.

**Prerequisite:** Delegates should have completed the Excel Advanced Course.

### MACROS

EXAMPLES

CREATING MACROS

RECORDING A MACRO

RELATIVE AND ABSOLUTE MACROS

PERSONAL MACRO WORKBOOK

RUN A MACRO

EDITING A MACRO

SAVING MACROS

STOPPING A MACRO

ASSIGN OR CHANGE A KEY STROKE FOR A MACRO

ASSIGNING A MACRO TO THE QUICK ACCESS TOOLBAR

ASSIGNING A MACRO TO A DRAWING OBJECT OR PICTURE

### DATA VALIDATION

VALIDATING A DATE

INSERT A DROP DOWN LISTS

VALIDATING A NUMBER

### CHARTS

PIE CHARTS

PIE OF PIE /BAR OF PIE

FLOATING CHARTS

TRENDLINES

### WHAT IF ANALYSIS

GOAL SEEKER

SCENARIOS

APPLYING A SCENARIO

EDITING A SCENARIO

CREATING A SCENARIO REPORT

### ANALYSING YOUR WORKSHEET

USING THE "GO TO SPECIAL" COMMAND

FINDING PRECEDENT AND DEPENDENT CELLS

COMPARING CELLS

AUDITING WORKSHEETS

Tracing Precedents

Tracing Dependents

Tracing Errors

### MANAGING YOUR WORK

WORKSHEET NOTATION

CELL COMMENTS

SHARING YOUR WORKBOOK

TRACKING CHANGES

# MICROSOFT EXCEL DASHBOARDS DAY 1

**Prerequisite:** Delegates should have completed the following courses: Excel Introduction, Intermediate, Advanced and Super User day 1 and 2.

## WHAT IS A DASHBOARD?

## PRINCIPLES OF DESIGNING A DASHBOARD

## DESIGNING A DASHBOARD

## CREATING A DATA MODEL

Data

Analysis Sheet

Dashboard

## FUNCTIONS USED TO BUILD YOUR DATA MODEL

If, Nested If

AND and OR

SUMIFS

COUNTIFS

CHOOSE

LOOKUP FUNCTIONS (VLOOKUP, HLOOKUP, LOOKUP, MATCH, INDEX)

SUMPRODUCT

## EXCEL TABLES

## BUILDING BASIC DASHBOARD COMPONENTS

## TABLES

Design and Formatting tables

Conditional Formatting

Sparklines

## PIVOT TABLES

Overview of Pivot Reports

Useful Pivot Reports for Dashboards

## CREATING CHARTS FOR THE DASHBOARD

Create Trend Charts

## THE CAMERA TOOLS

## MICROSOFT EXCEL DASHBOARDS DAY 2

|  |  |
|--|--|
|  |  |
| <b>ADVANCED CHARTS</b>                   |  |
|  | Top and Bottom Displays                  |
|  | Histograms                               |
|  | Performance against Target               |
|  | Progress Charts                          |
|  | Bullet Charts                            |
|  |  |
| <b>ADVANCED PIVOT TABLES</b>             |  |
|  | Pivot Reports                            |
|  | Pivot Slicers                            |
|  | Powerpivots (2013)                       |
|  |  |
| <b>CREATING DYNAMIC DASHBOARDS</b>       |  |
|  |  |
| <b>MACROS</b>                            |  |
|  | Create Macros to Automate your Dashboard |
| <b>INTERACTIVE FORM CONTROLS</b>         |  |
|  | Drop Down Lists                          |
|  | Buttons                                  |
|  | Check boxes                              |
|  |  |
| <b>AUTOSHAPES AND DYNAMIC TEXT BOXES</b> |  |
|  |  |
|  |  |
| <b>SHARING THE DASHBOARD</b>             |  |