

Microsoft Excel 2007

Level 3 - Advancing with Excel

This course focuses on the more advanced features of Excel 2007. Advanced analysis tools, especially pivot tables, Solver, outlining and summarising are covered, as are some key automation features such as Macros.

Who should attend

This course is designed for users who are already familiar with basic Excel features and operations and who are now ready to explore more of the advanced analysis and automation tools in Excel.

Prerequisites

This course assumes a good general understanding of the software and experience in the construction and modification of workbooks. The participant should be able to copy within Excel, create charts, and create basic formulas. It would be beneficial to have a general understanding of personal computers and the Windows operating system environment.

Course duration

This is a 1 day course. Typically, courses run from 9:00am to 4:30pm, allowing for morning, afternoon and lunch breaks. Start, finish and break times can be modified to suit your organisation.

What you'll need to bring

Training manuals, course training files and writing materials are provided to all participants. No other items are required. Additional copies of the course files can be obtained after the course at no extra charge.

Course customisation

On the following page you'll find a detailed breakdown of the topics covered in this course. If you wish to incorporate topics from one of our other Excel courses, contact us and we'll be able to customise this courseware so that the additional material is included.

Learning outcomes

At the completion of this course participants will be able to:

- use a range of lookup and reference functions
- modify Excel options
- create and use labels and names in a workbook
- protect data in worksheets and workbooks
- summarise data using subtotals and relative range naming
- use data linking to create more efficient workbooks
- use the Data Consolidation feature to combine data from several workbooks into one
- understand and create simple PivotTables
- construct and operate PivotTables using some of the more advanced techniques
- use goal seeking to determine the values required to reach a desired result
- group cells and use outlines to manipulate the worksheet
- use Solver to solve more complex and intricate problems
- create recorded macros in Excel
- use the macro recorder to create a variety of macros

The training room and facilities

When training on-site at your premises, we require only that each participant has access to their own computer or laptop, with Microsoft Excel 2007 installed.

Internet and networking facilities are not required. A data projector is required, and if your training room or board room is not equipped with one, we're able to provide one at no extra cost.

Other questions?

Contact us on (03) 8676 0655, or email us at enquiries@exceldimensions.com.au

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Lookup Functions

- Understanding Data Lookup Functions
- Using CHOOSE
- Using VLOOKUP
- Using VLOOKUP For Exact Matches
- Using HLOOKUP
- Using INDEX
- Using MATCH
- Understanding Reference Functions
- Using ROW And ROWS
- Using COLUMN And COLUMNS
- Using ADDRESS
- Using INDIRECT
- Using OFFSET

Setting Excel Options

- Understanding Excel Options
- Personalising Excel
- Setting The Default Font
- Setting Formula Options
- Understanding Save Options
- Setting Save Options
- Setting The Default File Location
- Setting Advanced Options

Chart Object Formatting

- Understanding Chart Object Formatting
- Selecting Chart Elements
- Using Shape Styles To Format Objects
- Changing Column Colour
- Changing Pie Slice Colour
- Changing Bar Colours
- Changing Chart Line Colours
- Using Shape Effects
- Filling The Chart Area And The Plot Area
- Filling The Background
- The Format Dialog Box
- Using The Format Dialog Box
- Using Themes

Labels And Names

- Understanding Labels And Names
- Creating Names Using Text Labels
- Using Names In New Formulas
- Applying Names To Existing Formulas
- Creating Names Using The Names Box
- Using Names To Select Ranges
- Pasting Names Into Formulas
- Creating Names For Constants
- Creating Names From A Selection
- Scoping Names To The Worksheet
- Using The Name Manager
- Documenting Range Names

Protecting Data

- Understanding Data Protection
- Providing Total Access To Cells
- Protecting A Worksheet
- Working With A Protected Worksheet
- Disabling Worksheet Protection
- Providing Restricted Access To Cells
- Password Protecting A Workbook
- Opening A Password Protected Workbook
- Removing A Password From A Workbook

Summarising And Subtotaling

- Creating Subtotals
- Using A Subtotalled Worksheet
- Creating Nested Subtotals
- Using Subtotals With AutoFilter
- Installing and Using The Conditional Sum Wizard
- Creating Relative Names For Subtotals
- Using Relative Names For Subtotals

Data Linking

- Understanding Data Linking
- Linking Between Worksheets
- Linking Between Workbooks
- Updating Links Between Workbooks

Data Consolidation

- Understanding Data Consolidation
- Consolidating With Identical Layouts
- Creating An Outlined Consolidation
- Consolidating With Different Layouts

PivotTables

- Understanding Pivot Tables
- Creating A PivotTable Shell
- Dropping Fields Into A PivotTable
- Filtering A PivotTable
- Clearing A Report Filter
- Switching PivotTable Labels
- Formatting A PivotTable

PivotTable Techniques

- Using Compound Fields
- Counting In A PivotTable
- Formatting PivotTable Values
- Working With PivotTable Grand Totals
- Working With PivotTable SubTotals
- Finding The Percentage Of Total
- Finding The Difference From
- Grouping In PivotTables
- Creating Running Totals
- Creating Calculated Fields
- Providing Custom Names
- Creating Calculated Items

PivotCharts

- Creating A PivotChart Shell
- Dragging Fields For The PivotChart
- Changing The PivotChart Type
- Using The PivotChart Filter Pane
- Moving PivotCharts To Chart Sheets

Goal Seeking

- Goal Seek Components
- Using Goal Seek

Grouping And Outlining

- Understanding Grouping And Outlining
- Creating An Automatic Outline
- Working With An Outline
- Creating A Manual Group
- Grouping By Columns

Solver

- Understanding How Solver Works
- Setting Solver Parameters
- Adding Solver Constraints
- Performing The Solver Operation
- Running Solver Reports
- Refining Solver Answers

Recorded Macros

- Understanding Excel Macros
- Setting Macro Security
- Saving A Document As Macro Enabled
- Recording A Simple Macro
- Running A Recorded Macro
- Relative Cell References
- Running A Macro With Relative References
- Viewing A Macro
- Editing A Macro
- Assigning A Macro To The Toolbar
- Running A Macro From The Toolbar
- Assigning A Keyboard Shortcut To A Macro
- Deleting A Macro
- Copying A Macro
- Tips For Developing Macros

Recorder Workshop

- Preparing Data For An Application
- Recording A Summation Macro
- Recording Consolidations
- Recording Divisional Macros
- Testing Macros
- Creating Objects To Run Macros
- Assigning A Macro To An Object

Need more information?

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