



Microsoft Excel 2003, 2007 and 2010 Course Outlines

Excel Level 1

Getting Started

To begin, participants will learn the basics of Excel: how to open and close it, how to use the interface, how to create a basic SpreadSheet and workbook, how to save and open workbooks, and how to get help.

The New Interface

Next, participants will closely examine the new interface, including the Quick Access Toolbar and each of the default tabs.

Excel Basics

In this section, participants will learn more about creating and opening existing SpreadSheets including how to work with cells, columns, rows, and ranges; as well as basic Excel formulas.

Editing Your Workbook

Participants will learn how to change the way their data appears, including basic formatting.

Printing and Viewing your Workbook

This section will focus on using the View tab, Print Preview, and Excel's various printing commands.



Excel Level 2

Formatting and Charts

Participants will learn how to use Excel Options to change their user name, default font, default file format, and screen theme.

Participants will learn how to change the way their data appears, including using conditional formatting, the Format Painter, and styles. Participants will also learn how to create and edit charts (graphs)..

Working with Functions and Formulas

This section will take an in-depth look at Excel formulas and functions, absolute and relative cell references as well as the IF, AVERAGE, COUNT, MIN, and MAX functions. Array formulas and percentages are also explored.

Managing Tables

Believe it or not, you can actually use Excel 2007 as a basic database application. This section will explain how to do that through a discussion of tables, records, fields, filters, and sorting.

Enhancing your Workbook

Participants will learn how to add shapes, SmartArt, text boxes, WordArt, ClipArt, embedded objects, and signature lines to their workbook. We will also look at templates available and how to create your own templates.

Problem solving

Delegates will look at SpreadSheets and solve problems relating to SpreadSheets such as readability, presentation and accuracy.

Managing your workbooks

Participants will learn how to create and use shared workbooks; use custom AutoFill lists; and how to link, consolidate, and combine workbooks. Different views and splitting and view options will be explored.



Excel Level 3

Advanced Topics

Participants will also learn how to use formula troubleshooting tools, named ranges, AutoCalculate,

Getting the Most from your Data

This section will explore some of Excel's data analysis tools, including the outlining feature, subtotals, PivotTables and Pivot Charts, scenarios, and what-if analysis. Data validation and data integrity will also be explored.

Workbook consolidation

This section will look at some tools used to link Excel data including hyperlinks, using named ranges, macros and how to create forms.

Advanced Excel Formulas

The following functions will be explored:

SumIf, Round Down, Round Up, Even, ODD, Countif, CountA, Trend, Large, Small, FV, NPV, PMT, IPMT, NPER, PV, Rate, Upper, Lower, Proper, Concatenate, LookUp, Vlookup, Hlookup, IF (nested), AND, OR, NOT, TRUE, FALSE.

Formula auditing will be covered.

Finalizing your Workbook

This section will explore some of Excel's security tools, including the Protect Sheet command and the Lock command. Tools to import data will be explored. We will also look at using Excel data in Word, Access, and Outlook, and at saving Excel data in common formats (including PDF) to be read by non-Office applications.



Excel Level 4

Macros, VBA, and Excel Programming

This section will introduce participants to macros and Visual Basic programming.

Expert Topics To conclude the course, participants will learn how to use Excel to create and program forms, how to publish Excel data to a SharePoint server, and how to use advanced functions (including PMT, FV, and logical functions).

Excel Dashboard Reports

Excel Dashboard Reports

Essentially, a dashboard report is a way to visually present critical data in summary form so that you can make quick and effective decisions, in much the same way that a car dashboard

- How to display data from any number of sources, of any kind, using virtually any design...all in one report.
- How to create mini-charts for Dashboard reporting
- How to create figures that use both Charts and Worksheets
- How to use Excel's Camera Tool
- How to funnel data into Dashboard Reports
- How to use SpreadSheet databases for Dashboard Reporting
- How formulas in any number of high-quality Excel reports can link to general-purpose Excel databases, or to Excel-friendly OLAP databases.
- Updating reports in seconds...rather than minutes, or hours....
- How to create magazine-quality Excel reports.
- How to change the reports quickly, to respond to managers' changing information needs



Excel Functions and Formulas

Unit Standard Title: Use a graphical user interface based Spreadsheet application to solve a given problem (116940)

Credits: 6

NQF Level: 3

Pre-requisites: Delegates need to have completed an Excel Level 2 course (intermediate) or have understanding and experience using formulas.

Target Audience:

This course is aimed at people who would like to learn how to use the various functions within Excel to solve problems. We go into depth with over 140 functions to solve problems such as:

- Calculating Age
- Shortcut keys for formulas and graphs
- Filename Formula
- Percentages
- Splitting Names and Surnames
- Calculating Time
- Creating Time sheets for flexi time
- Working out your most frequent orders/sales
- Lookups
- Forecasting
- Automatic time/date updates



Function List

ABS	ISBLANK	STDEVP
ADDRESS	ISERR	SUBSTITUTE
Analysis ToolPak	ISERROR	SUM
AND	ISLOGICAL	AREAS
ISNA	AVERAGE	ISNONTEXT
CEILING	ISNUMBER	SUMIF
CELL	ISREF	UMPRODUCT
CHAR	ISTEXT	SYD
CHOOSE	LARGE	T
CLEAN	LEFT	TEXT
CODE	LEN	TIME
COMBIN	LOOKUP (Array)	TIMEVALUE
CONCATENATE	LOOKUP (Vector)	TODAY
CORREL	LOWER	TRANSPOSE
COUNT	MATCH	TREND
COUNTA	MAX	TRIM
COUNTBLANK	MEDIAN	TRUNC
COUNTIF	MID	UPPER
DATE	MIN	VALUE
MINUTE	VAR	DATEVALUE
MMULT	VARP	DAVERAGE
MOD	VLOOKUP	DAY
MODE	WEEKDAY	DAYS360
MONTH	YEAR	DB
N	DCOUNT	NA
DCOUNTA	NOT	DGET NOW
DMAX	ODD	DMIN OR
DOLLAR	PERMUT	DSUM
PI	BIN2DEC POWER	CONVERT
ERROR.TYPE	PRODUCT	DEC2BIN
EVEN	PROPER	DEC2HEX
EXACT	QUARTILE	DELTA
FACT	RAND	EDATE
FIND	RANK	EOMONTH
FIXED	REPLACE	GCD
FLOOR	REPT	GESTEP
FORECAST	RIGHT	HEX2DEC
FREQUENCY	ROMAN	ISEVEN
ROUND	ISODD	HLOOKUP
ROUNDDOWN	LCM	HOUR
ROUNDUP	MROUND	IF
SECOND	NETWORKDAYS	INDEX SIGN
QUOTIENT	INDIRECT	SLN
RANDBETWEEN INFO	SMALL	WORKDAY
INT	STDEV	YEARFRAC



Microsoft Excel Tips & Tricks

A specialised course covering some of Excel's most useful features. This class is designed for the experienced Excel user. It covers topics ranging from customising the Excel environment to using named ranges to fixing common problems with data imported from external sources to solving problems with array formulas. Participants will learn several practical techniques, including using custom number formats to solve a variety of everyday problems and using keyboard shortcuts in combination with the pointer to manipulate worksheet data quickly and efficiently.

Duration: 1 day

Introduction to custom number formats

- Understanding how custom number formats work
- Creating and deleting custom number formats
- Rounding numbers and aligning decimals

Creating special-purpose toolbars

- Putting your favourite commands right where you need them

Using named ranges

- Import an Access table
- Find and Fix Problem Text Data
- Find and fix Number Data Problems
- Importing a Text File into a Worksheet

Working with data problems

- Identifying and fixing problems with the TRIM and CLEAN functions
- Filling in the blanks to make table data useable
- Using the *Paste Special Multiply* technique to fix numbers stored as text

Lookups with data validation lists

- Creating compound VLOOKUP formulas
- Creating and using items lists to drive data analyses

Power lookups

- Beyond VLOOKUP with INDEX and MATCH functions
- Using array formulas for multiple-value lookups

Conditional statistical functions

- Using COUNTIFS, AVERAGEIFS and SUMIFS to analyze large datasets

Super shortcuts: columns and rows

- Four simple but amazingly powerful keyboard / pointer combinations for efficient Cut, Copy, Paste and Insert operations



Charting in Excel

Unit standard Number	116943
Title	Using a Graphical User Interface (GUI)-based spreadsheet application, enhance the functionality and apply graph /charts to a spreadsheet
Level	4
Credits	3
Field	Physical, Mathematical, Computer and Life Sciences.
Sub-field	Computing.
Domain	Information Technology and Computer Sciences
Purpose	People credited with this unit standard are able to:

- Create and edit a graph/chart.
- Load data from an external data source to produce a given spreadsheet result.
- Insert and edit objects in a spreadsheet.

Duration: 4 hours (09:00 – 14:00)

- Introduction to Charts
- Determining when charts are required
- Creating and modifying charts with wizards
- Adjusting chart layouts, title and labels
- Switching chart type or data source
- Editing Charts
- Importing data for Charts
- Pivot Tables
- Pivot Table Charts
- Exporting graphs into other applications