

Course Title: Workers in Transition Technology Program – Excel 2007 Level 1

Course Subtitle: Part of the “Transitioning to a New Job and Office 2007” Training Series

Course Number: 70-602-1

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Course Length: 4 ½ Hours

Course Description: Not just for accountants, Excel has become a ubiquitous technology tool used in a wide variety of roles, across all departments and disciplines and within organizations of all types. This is a 4 ½ hour course that helps students develop a proper foundation in the use of this important tool and addresses user needs:

- Fundamentals - In a “hands-on” approach, both novice and experienced students will establish or confirm a clear understanding of basic features, functions and correct approaches to the use of this tool.
- Transition - The course is designed to assist all students with the transition from earlier versions of Excel (97-2003) to the most current versions (2007/2010). The student learns to prepare for both the continued evolution of this product and for advancement into more sophisticated usage.
- Certification - For those students seeking to obtain certification in this product, this course content (along with the successive courses in this series) dovetails with skills measured in Exam 70-602, offered by the official Microsoft testing organization for the Office product line ([Certiport](#)).
- Verification – Those students not intending to obtain certifications still get verification of their continuing coursework with their Office products. Students get course certificates, attesting to their attendance in these sessions, under a Microsoft Certified Trainer. This assists users in fulfilling personal development requirements, and may aid in Microsoft Office skillset workplace competency.

Course Instructors: All instructors are, at a minimum, Microsoft Office Specialists in the products on which they instruct, and are required to have several years of teaching experience, in addition to several years of business experience.

The principal instructor, Robert E. Gwin, has been a Microsoft Office Specialist Master Instructor (certified in Word, Excel, Outlook, PowerPoint, and Access) on all versions from '97 through 2007 and is a Microsoft Certified Trainer. He has over 15 years of technology training delivery experience, in addition to more than 10 years as a law firm administrator, project manager and consultant. Publicly available endorsements from clients, students and colleagues for his work can be readily viewed on his [LinkedIn profile](#).

Intended Audience: This course is designed for both novice and experienced technology users, and specifically for those who need to understand how to use Excel to plan, create, edit, format, and distribute (print) basic Microsoft Office Excel 2007 worksheets, focusing on the matrix structure (using a budget example).

Novice users should expect to get a correct foundation for use of this tool. Experienced users should see some things they already know, but will also have the chance to both close up “gaps” in understanding, as well as any “workarounds” they may have developed (if they haven’t taken formal training). Thus, information workers and those who manage them will both profit from these sessions.

Those needing a more comprehensive understanding will move from this basic class to any of several additional sessions, each of which will focus on an expansion of features or functions introduced in Level 1 or features and functions not covered in the earlier course.

Prerequisites: Participants should have some general computer experience and be comfortable using the mouse or track pad.

Course Goals: The course focuses on the planning and development of a spreadsheet application using a “budget model” as the context for understanding fundamental features and functions of Microsoft Excel 2007. This also sets the stage for Level 2, which expands on topics and approaches in Level 1.

Course Progression:

- Explore the Microsoft® Office Excel® 2007 environment (including how to transition to the new Fluent Users Interface from earlier versions)
- Review considerations in planning a spreadsheet application
- Enter and edit content (labels, values, formulas and objects) addressing common features, functions and approaches
- Prepare a spreadsheet for printing or other method of distribution
- Access and review support and other resources for post class use
- Lab Examples designed to reinforce and extend classroom activities. These are conducted at the end of the class and after the class.

Course Content

1 The Microsoft Excel 2007 environment

1.1 What is the transition to Office 2007?

1.1.1 Pros

1.1.2 Cons

1.2 The Fluent User Interface

1.2.1 Office button

1.2.2 Quick Access Toolbar

1.2.3 Ribbon

1.2.4 Contextual Tabs

1.2.5 Live Preview

1.2.6 Mini Toolbar

2 Planning and Creating a Basic Worksheet

2.1 Overview of Considerations (See the In Class Scenario under References and Notes)

2.1.1 Purpose

2.1.2 Audience

2.1.3 Information Sources

2.1.4 Security

2.1.5 Privacy

2.1.6 Confidentiality

2.1.7 Auditing or Proofing

2.1.8 Method of Distribution

2.1.9 Documentation

2.1.10 Availability of Templates or Pre-Existing Examples

2.1.11 And more ...

2.2 Templates / Example Analysis Purpose

2.2.1 The Difference between the Default "Blank" Template and Others

2.2.2 Issues in Utilizing Templates

3 Inserting Content

3.1 See Selection Technique, Input Methods and Shortcuts Click and drag

3.1.1 Ctrl + Click (Selects Non Adjacent Cells)

3.1.2 Shift + Click (Selects Cells from a Starting Cell to and Ending Cell)

3.1.3 Enter Range from Name Box (Enter Starting Cell Reference: Ending Cell Reference)

3.1.4 Right Click (Produces the Shortcut (or Context) Menu)

3.1.5 Dialog Boxes (Enables Control for the Title of the Dialog Box)

3.1.6 Select Row Header, Column Header (Selects Entire Row or Column)

3.1.7 Ctrl + A (Select All)

3.1.8 F4 (Repeat Key)

3.1.9 Ctrl + Home (Go to First Cell in Worksheet)

3.1.10 Ctrl + End (Go to Last Cell in Worksheet)

3.1.11 Shift Ctrl + End (Selects Cells from a Starting Cell to and Ending Cell in Spreadsheet)

3.1.12 Shift Ctrl + Down/Up/Right (Selects Cells from a Starting Cell to and Ending Cell Down/Up/Right)

3.1.13 Resize/Auto Resize (Resizes/Auto Resizes Column Width ... Can Also Be Used on Row Heights)

3.1.14 Microsoft Complete [Reference on Excel Keyboard Shortcuts](#)Labels

3.2 Values

- 3.3 Formulas
- 3.4 Arithmetic Operators (+, -, /, *)
- 3.5 Functions (Sum, Average, Max, Min)
- 3.6 Absolute v. Relative References
- 3.7 Objects
- 4 Insertion / Editing Methods**
- 4.1 Original typing
- 4.2 Copy/Paste (techniques + the clipboard and auto fill)
- 4.3 Find/Replace
- 4.4 Modify cell contents and formats
- 4.5 Smart Tags
- 5 Preparation and progression of the spreadsheet (including formula creation and auditing)**
- 5.1 Inserting Objects Generally
- 5.2 Clip Art and Pictures
- 5.3 Smart Art
- 5.4 Charts
- 6 Formatting**
- 6.1 Step by Step Incremental Formatting (Formatting Cells)
- 6.2 Format Painter
- 7 Views**
- 7.1 Document Views (Normal v Layout v Print Preview)
- 7.2 Zoom
- 8 Page Setup Dialog Box**
- 8.1 Page Break Preview
- 8.2 Margins vs. Scale vs. Orientation
- 8.3 Set Print Area vs. Titles
- 8.4 Insert or Edit Headers/Footers
- 9 Proofing, Saving and Distribution Options**
- 9.1 Spell Check
- 9.2 Show /Hide Formulas
- 9.3 Insert Documentation (Text Boxes)
- 9.4 Determine Correct File Type for Recipients
- 10 Post Class Resources**
- 10.1 [Microsoft Office Online](#)
- 10.2 [Office Blogs](#)
- 10.3 [Office Labs](#)
- 10.4 [Office for IT Pros](#) (TechNet, Including Forums and Experts)
- 10.5 [Microsoft Communities](#)
- 10.6 [Microsoft Training Portal](#)
- 10.7 [Microsoft Exam 70-602 Preparation Materials](#)
- 11 Labs**
- 11.1 Extend formatting to include the use of "Styles", Including Creation of Styles.
- 11.2 Extend formatting to include "Format as Table", including reverting to Range.
- 11.3 Extend formula creation to include use of additional "functions" in an Analysis and Variables Region.
- 11.4 Extend chart creation to include a comparison of expense sources over the period.
- 11.5 Extend Smart Art creation to modify the organizational chart through Smart Art styles.

12 References and Notes

12.1 In Class Scenario

Class exercises are based on the following scenario (all names are fictional):

Your firm is Bamford GSG, LLC which needs to present its current financial information to potential funding sources. As a member of this start up organization, you've been asked to create a 6 month pro forma budget for presentation to the firm's executive team and then to provide follow up modification requested by them before presentation to funding sources. There is, as yet, no dedicated finance group, so you've been asked to create a foundation for the eventual presentation budget using the following information.

The firm has first month revenues and expenses. The firm's economic advisors have indicated that they expect the firm to be able to grow at a rate of 10% each month after the first month, while constraining expenses to 5%. The executive team wants a flexible spreadsheet design that will permit a changing of the growth assumptions, if necessary. Additional requirements include the inclusion of the firm's logo, a chart comparing revenue sources for the six month period, and an explanation, in graphic form, of the current organizational chart.

The spreadsheet format should be simple, uncomplicated, but highlight key categories. The spreadsheet should contain appropriate headers and footers and be sized correctly for immediate printing by any reviewer.

Data for the spreadsheet includes:

Revenue Sources	Expenses
Source A - \$5,000	Expense 1 - \$3,000
Source B - \$3,000	Expense 2 - \$2,000
Source C - \$2,000	Expense 3 - \$1,000
	Expense 4 - \$900
	Expense 5 - \$80

12.2 Student Comments and Feedback

This section is for feedback from students about the course. If you have some comments that you think will contribute to making this a more effective Level 1 class, put them here and email them to:

Robert.Gwin@eGwin.com.

12.3 Microsoft Certification Exam 70-602 Topic Coverage (as of Thursday, August 05, 2010)

This table provides the current listing of exam topics for the relevant Microsoft certification in Excel 2007. Please check those requirements from time to time, as they may change. I've marked those topics treated in some fashion in this course, (in the instructor's opinion).

Exam Skills/Topics	Covered in Class
Creating and Manipulating Data	
Insert data by using AutoFill.	X
Ensure data integrity.	
Modify cell contents and formats.	X
Change worksheet views.	X
Manage worksheets.	
Formatting Data and Content	
Format worksheets.	X
Insert and modify rows and columns.	X
Format cells and cell content.	X
Format data as a table.	
Creating and Modifying Formulas	
Reference data in formulas.	X
Summarize data by using a formula.	X
Summarize data by using subtotals.	
Conditionally summarize data by using a formula.	
Look up data by using a formula.	
Use conditional logic in a formula.	
Format or modify text by using formulas.	
Display and print formulas.	
Presenting Data Visually	
Create and format charts.	X
Modify charts.	X
Apply conditional formatting.	
Insert and modify illustrations.	X

Outline data.	
Sort and filter data.	
Collaborating on and Securing Data	
Manage changes to workbooks.	X
Protect and share workbooks.	
Prepare workbooks for distribution.	X
Save workbooks.	X
Set print options for printing data, worksheets, and workbooks.	X